

Chapter 2

Creating Projects

Learning Objectives

After completing this chapter, you will be able to:

- *Understand the Enterprise Project Structure*
- *Create a project*
- *Copy and delete a project*
- *Understand the Project Details Window*
- *Understand the OBS*



INTRODUCTION

Planning is the foremost important function of management. It is required at every stage of management. Planning provides direction and facilitates decision making. It also reduces the risks of uncertainty, overlapping and wasteful activities. The business activities will not be successful in the absence of planning.

In this chapter, you will learn how to start planning and creating projects. Also, you will learn to structure and add projects to the hierarchy. The process of setting up the EPS and OBS and to use these methods for planning and managing project information is also explained in this chapter.

SETTING THE ENTERPRISE PROJECT STRUCTURE(EPS)

The EPS of an organization contains the hierarchical structure of all the projects in its database. The hierarchical structure is designed to show various levels required to represent the work on various projects in an organization. The EPS forms the initial grouping of the portfolios of the projects. It helps in managing multiple projects from the individuals to the highest levels of the organization. An organization has a large database that contains information about all the current projects and other related things. For efficient management of the projects within an organization the EPS should be structured in such a way that allows all the individuals to access the concerned project data.

The EPS can be further sub-divided into many nodes or levels as required. The EPS nodes and the procedure of adding the nodes are described next.

Understanding EPS Nodes

The EPS nodes represent the levels within the projects. The number of EPS nodes and their structure depends upon the scope of the projects and on the method of reviewing the data. The highest node in the EPS is the root node. The root node may have further divisions such as zones, area construction, supervising team, and so on. Figure 2-1 shows an example of the EPS and the EPS nodes in which the **Innovative Construct** node is the EPS which includes a lower level EPS node called **Facilities**.

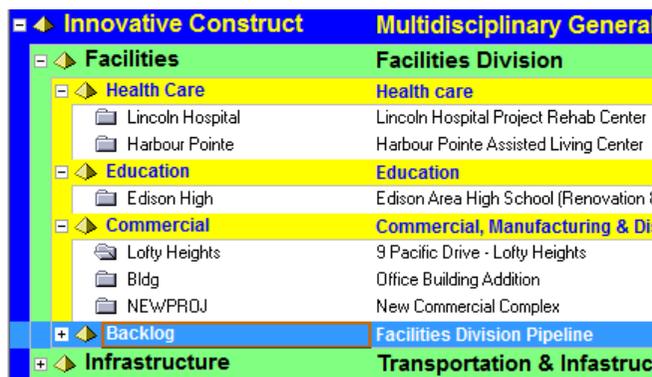


Figure 2-1 The hierarchy showing nodes in an EPS

The **Facilities** node has three subnodes, namely **Health Care**, **Education**, and **Commercial**. Each of these sub-nodes contains projects that are a part of the **Facilities** node. For example,

the **Health Care** node contains the **Lincoln Hospital Project Rehab Center** and **Harbour Pointe Assisted Living Center** sub-nodes. You can add as many projects required to complete the desired work and which fall within the scope set by the operation executives and program managers or engineers in the organization. Multiple levels in the EPS helps you to manage projects separately while securing the data and summarizing it to the higher levels. For example, you can outline the data information up to each node in the EPS and also top-down budgeting can be checked from the top node to the lower node through their low-level projects for control.

Adding EPS Nodes

Menu Bar: Enterprise > Enterprise Project Structure

In Primavera P6, for assigning the EPS nodes to all the projects of an organization, choose the **Enterprise Project Structure** option from the **Enterprise** menu in the menubar; the **Enterprise Project Structure (EPS)** dialog box will be displayed, as shown in Figure 2-2. In this dialog box, select the node under which you want to add a new EPS node. Then, choose the **Add** button from the right pane of the dialog box; a new EPS subnode will be added under the selected node. You can also assign a unique ID and name to the new subnode under the **EPS ID** and **EPS Name** columns, respectively, refer to Figure 2-2.

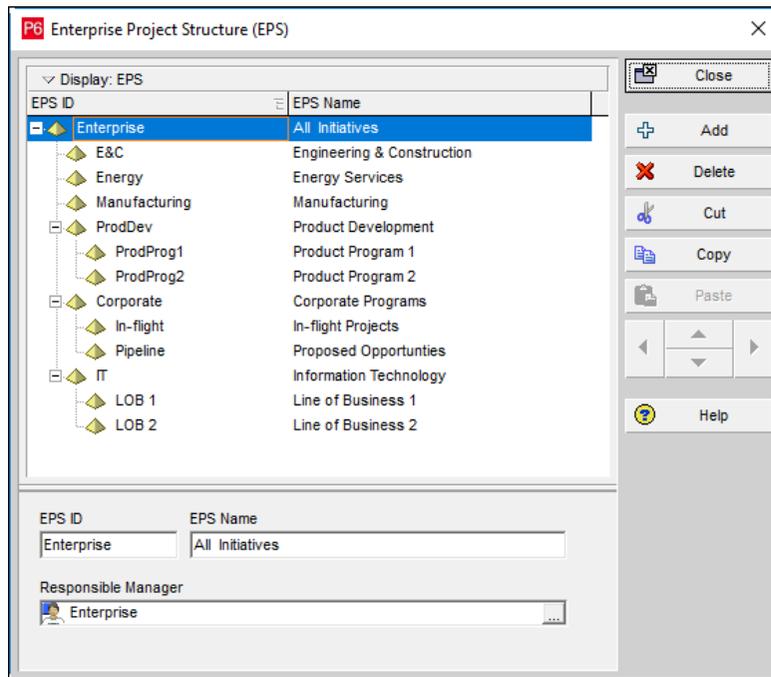
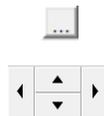


Figure 2-2 The Enterprise Project Structure (EPS) dialog box

In the **Responsible Manager** edit box, specify a responsible manager for the created node or choose the Browse button adjacent to it and select a different OBS element for the node. You can use the arrow keys available in the right pane of the **Enterprise Project Structure (EPS)** dialog box to indent/outdent a node to mark its placement in the EPS or to move a node up or down in the hierarchy.



You can categorize many levels in the EPS hierarchy by including more than one root node. To do so, add an EPS root node in the same way as you added an EPS node, but outdent the root to the left most position in the hierarchy. Choose the **Close** button to exit the dialog box. Select the **Projects** tool from the **Enterprise** menu in the menubar; the **Projects** window will be displayed. In this window, the EPS will be displayed, as shown in Figure 2-3. The EPS nodes that contain subnodes and projects are identified by a pyramid symbol. If there are more nodes or projects rolled up beneath the selected subnodes then the EPS will be symbolized by an additional symbol. Click on this symbol or double click on the node to display the additional nodes or levels in the hierarchy.

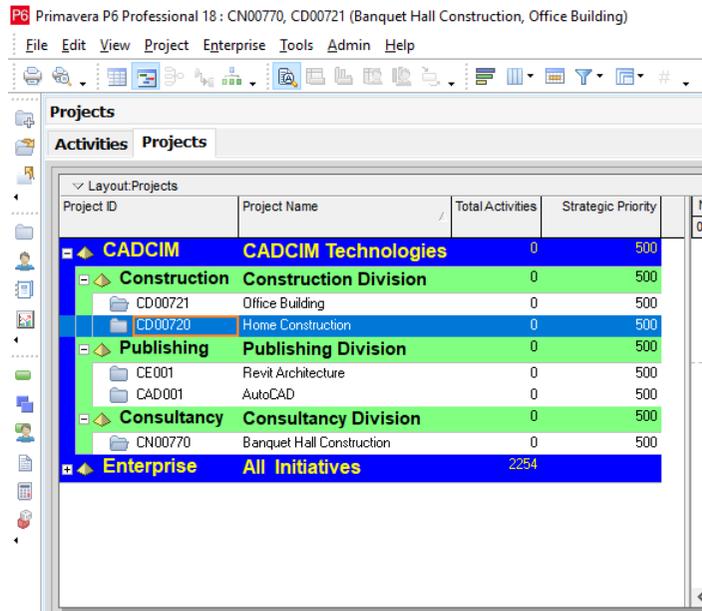


Figure 2-3 The Projects window displaying the EPS containing the EPS nodes and sub-nodes

You can open an EPS node to open all the projects in it or you can open the projects individually. In the next section, you will learn to work with the project and also to add a project.

WORKING WITH PROJECTS

A project is a temporary group activity which is designed to perform different tasks and constitutes a plan for creating a product or service. Being temporary, all the projects have a definitive start and finish dates. A project can involve a single person, a single organizational unit, or multiple organizational units.

An organization may have several projects to work on and each project has its own resource assignments. Similarly, each project has its own specific calendars, reports, and activity codes. Working as a program manager in an organization, an individual has to manage one or more higher level projects in the organization. Therefore, it would become convenient, if all such projects are added under an EPS node.

Adding a Project

To add a new project, open the **Projects** window by choosing the **Projects** tool from the **Enterprise** menu in the menubar. In the **Projects** window, select the **EPS** node to which you want to add the project and choose the **Add** button from the Command bar; the **Create a New Project** wizard with the **Select EPS** page will be displayed, as shown in Figure 2-4.

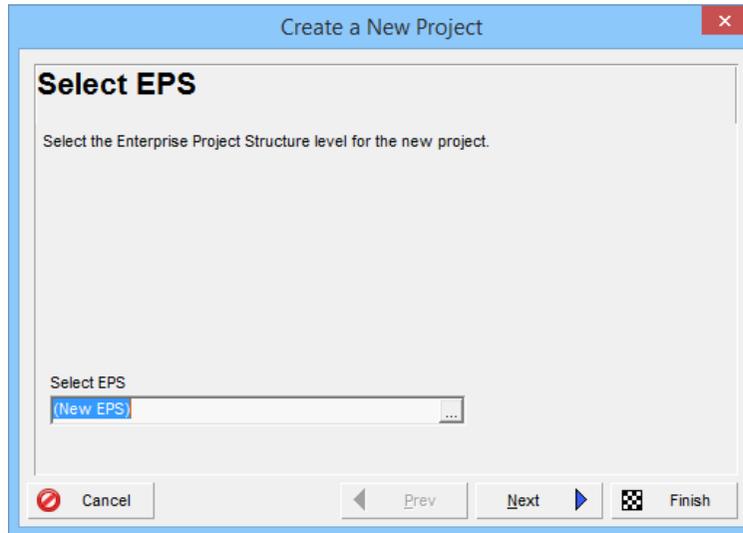


Figure 2-4 The Select EPS page of the Create a New Project wizard

In the **Select EPS** page of the **Create a New Project** wizard, the selected EPS name will be displayed in the **Select EPS** edit box. You can change the existing EPS to the required EPS by choosing the **Browse** button. On doing so, the **Select EPS to add into** dialog box will be displayed. In this dialog box, select the EPS to be assigned and then choose the **Select** button from the right pane of the dialog box; the **Select EPS to add into** dialog box will be closed and  the selected EPS will be assigned to the project.

Now, choose the **Next** button; the **Project Name** page of the **Create a New Project** wizard will be displayed, as shown in Figure 2-5. In this page, you can specify the id and name of the project in the **Project ID** and **Project Name** edit boxes, respectively. Note that the project id is a short and unique identifier of the project.

The screenshot shows a window titled "Create a New Project" with a red close button in the top right corner. The main heading is "Project Name". Below the heading, there is instructional text: "Enter the Project ID and Project Name. The Project ID is a short, unique identifier for your project." There are two input fields: "Project ID" containing the text "NEWPROJ-1" and "Project Name" containing "(New Project)". At the bottom of the window, there are four buttons: "Cancel" (with a red circle and slash icon), "Prev" (with a left arrow icon), "Next" (with a right arrow icon), and "Finish" (with a checkered icon).

Figure 2-5 The Project Name page of the Create a New Project wizard

Once you have specified the project id and project name in the **Project Name** page, choose the **Next** button; the **Project Start and End Dates** page of the **Create a New Project** wizard will be displayed, as shown in Figure 2-6.

The screenshot shows a window titled "Create a New Project" with a red close button in the top right corner. The main heading is "Project Start and End Dates". Below the heading, there is instructional text: "Specify the planned start date and must finish by date for the project. The Must Finish By date is the date by which all project activities must finish. If entered, it is used as the project late finish date by the project scheduler." There are two date input fields: "Project Planned Start" containing "28-Dec-18" and "Must Finish By" which is empty. Both fields have a browse button (three dots) to the right. At the bottom of the window, there are four buttons: "Cancel" (with a red circle and slash icon), "Prev" (with a left arrow icon), "Next" (with a right arrow icon), and "Finish" (with a checkered icon).

Figure 2-6 The Project Start and End Dates page of the Create a New Project wizard

The **Project Start and End Dates** page of the wizard is used to specify the starting date and desired ending date for the project. In the **Project Planned Start** edit box of this page, you can specify the date on which you are planning to start your project. To specify a date, choose the Browse button in the **Planned Start** edit box; the calendar to specify the date will be displayed. Select a date from the calendar and then choose the **Select** button; the calendar will be closed

and the date is specified in the **Planned Start** edit box. Similarly, in the **Must Finish By** edit box, you can specify the date on which you want your project to get finished. Specify the **Must Finish By** date to enable you to track the project delay.

After specifying the start and finish date in the **Project Start and End Dates** page, choose the **Next** button; the **Responsible Manager** page of the **Create a New Project** wizard will be displayed.

In this page, you can assign a responsible manager to the project which is an OBS element and is selected from the OBS structure. To specify the responsible manager, click on the Browse button in the **Responsible Manager** edit box; the **Select Responsible Manager** dialog box will be displayed, as shown in Figure 2-7. In this dialog box, select the OBS name from the list that you want to assign as the responsible manager for your project. To do so, click on the desired name and then choose the **Select** button displayed on the right side of the **Select Responsible Manager** dialog box. 

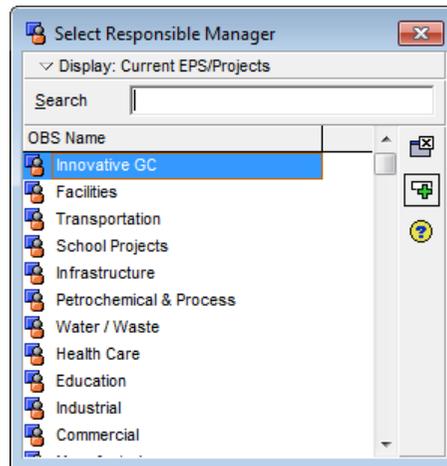


Figure 2-7 The Select Responsible Manager dialog box

After specifying the responsible manager in the **Responsible Manager** page, choose the **Next** button; the **Assignment Rate Type** page of the **Create a New Project** wizard will be displayed, as shown in Figure 2-8.

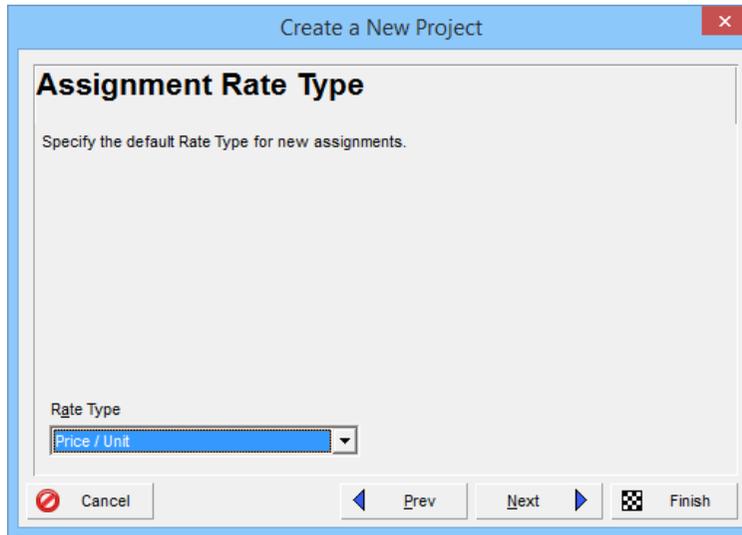


Figure 2-8 The Assignment Rate Type page of the Create a New Project wizard

The **Assignment Rate Type** page is used to specify the rate type you want to use to calculate costs for the assignments in your project. To specify the rate type, choose the desired price per unit from the **Rate Type** drop-down list. After specifying the rate type in the **Assignment Rate Type** page, choose the **Next** button; the **Congratulations** page will be displayed with a message that the project has been created as shown in Figure 2-9. Choose the **Finish** button in the **Congratulations** page; the **Create a New Project** wizard will be closed and the new project will be added under the selected EPS node.

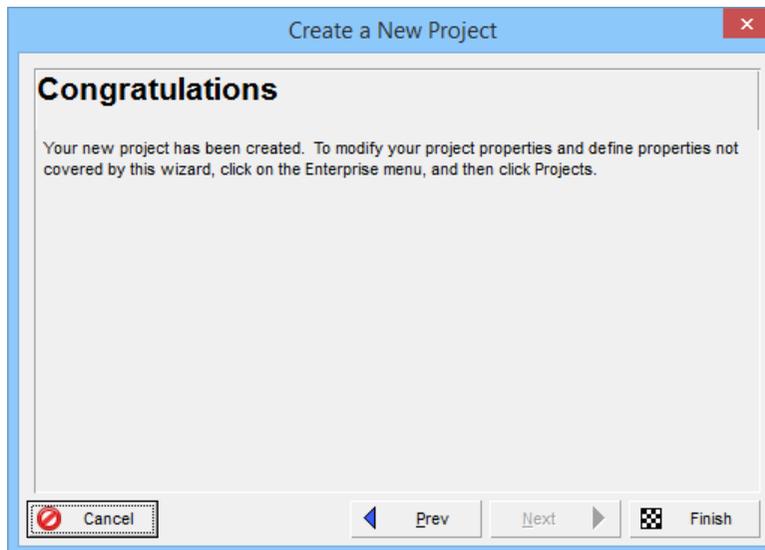


Figure 2-9 The Congratulations page of the Create a New Project wizard

Defining the Project Status

The status of a project shows whether the project is completed or is still in progress. This will help you to organize and summarize the information. If the project is a completed project then it will be marked active and when it gets completed its status is changed to Inactive. You can also assign a What-if status to a copied project.

To assign a status to a project choose the required project or the EPS node from the **Projects** window; the details of the selected project will be displayed in different tabs of the **Project Details** table. In the **Project Details** table, choose the **General** tab and select the desired status for your project from the **Status** drop-down list, as shown in Figure 2-10. The **Active** status is selected by default in this drop-down list.

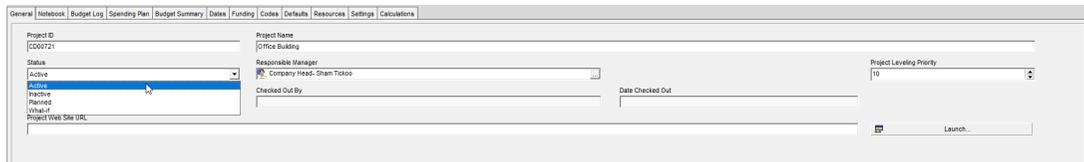


Figure 2-10 Selecting the status from the **Status** drop-down in the **General** tab

If you want the status of the project other than the **Active** status then place the project under separate root node in the EPS. Note that the project will still remain part of the hierarchy but will not be considered as the part of that EPS when you budget, schedule, and level your active projects. To place a project under separate root node, choose the **Enterprise Project Structure** option from the **Enterprise** menu in the menubar; the **Enterprise Project Structure (EPS)** dialog box will be displayed. In this dialog box, place the desired status root node at the bottom of the EPS to keep it separated from the rest of the hierarchy. To designate the separated node as the root node move the node to the left in the **Projects** window by using the **Shift Left** arrow button.

You can view projects with specific status. To do so, choose **Filter By > Customize** option from the **View** menu; the **Filters** dialog box will be displayed, as shown in Figure 2-11. In the **Filters** dialog box, select the desired check boxes corresponding to the desired status. Choose the **OK** button; the projects with the specified status will be displayed in the **Projects** window.

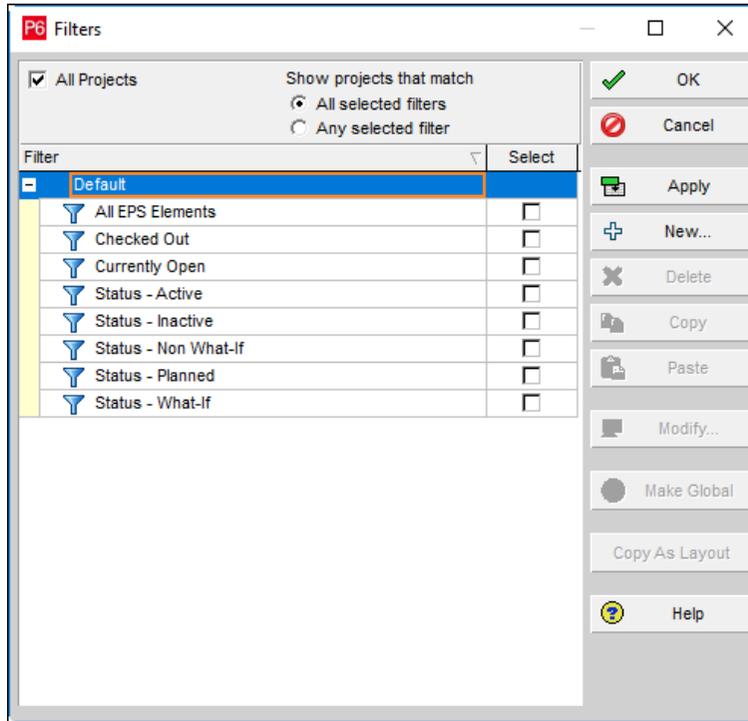


Figure 2-11 The Filters dialog box

Copying a Project

You can copy an existing node or project by using the template of that node or project. The copied node or project then can be used as a template. When you copy a project in the EPS, you can also copy the related links to the WBS documents, OBS, and other related elements. To start with the copying process of a node or project, select the node or project you want to copy and choose the **Copy**, **Paste** buttons from the Command bar; the **Copy Project Options** dialog box will be displayed, as shown in Figure 2-12.

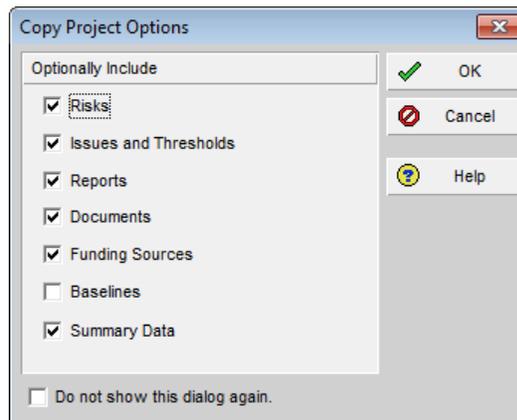


Figure 2-12 The Copy Project Options dialog box

To specify the attributes for your new project or node, select the required check boxes in the **Copy Project Options** dialog box. Choose the **OK** button; the **Copy WBS Options** dialog box will be displayed. In this dialog box, select the check boxes to select the attributes of the WBS that you want to associate with your project, and then choose the **OK** button; the **Copy Activity Options** dialog box will be displayed, as shown in Figure 2-13.

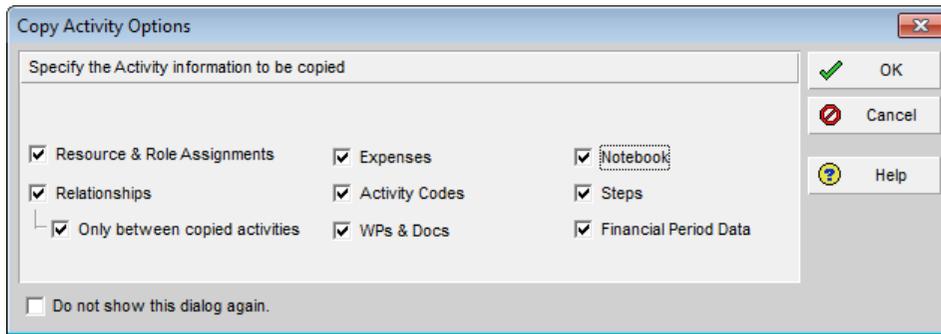


Figure 2-13 The Copy Activity Options dialog box

Select the check boxes corresponding to the desired option(s) in the **Copy Activity Options** dialog box and choose the **OK** button; the dialog box is closed and the EPS node or project will be copied and added to the **Projects** window.

Deleting a Project

You can also delete an EPS node or project. To do so, select the EPS node or project to be deleted and then choose the Delete button from the Command bar; the **Primavera P6 Professional 18** message box with a warning will be displayed, as shown in Figure 2-14.

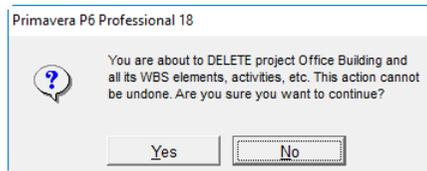


Figure 2-14 The Primavera P6 message box displayed

This message box warns that if you delete this node or the project then all its related data which include the **WBS** elements, activities, and so on will also get deleted and deleted cannot be recovered. If you choose the **Yes** button in this message box, the selected EPS node or project will be deleted.



Note

When you delete an EPS node, all the projects under that branch of hierarchy will also be removed. So, if you do not want to delete those projects, copy and paste them to some other area in the hierarchy or under some other EPS node.

Understanding Project Details Table

The **Project Details** table, as shown in Figure 2-15, is displayed under the **Projects** window. If not displayed by default, choose **View > Show on Bottom > Details** from the menubar.

Figure 2-15 The Project Details table

The **Project Details** table contains various tabs having options to define an EPS or a project. You can customize the details table by right clicking anywhere in the table; a menu will be displayed. In this menu, select the **Customize Project Details** option; the **Project Details** dialog box will be displayed. In this dialog box, you can shift the required options from the **Available Tabs** list to the **Display Tabs** list. Some of the tabs and their options in the **Project Details** table are discussed next.

General

The **General** tab helps you to view and edit general information such as ID, name, status, responsible manager, risk level, project leveling priority for the selected node or project. If applicable, you can enter the project web site address in the **Project Web Site URL** edit box.

Dates

The **Dates** tab helps you to edit time table information for the selected project or node. This information includes the planned start date, must finish date, data date and finish date. Also, you can specify the anticipated start and finish date for the selected project.

Notebook

The **Notebook** tab helps you in assigning notebook topics, details, and description to the selected node or project.

Defaults

The **Defaults** tab enables you to specify the default settings or information for the selected project. This information includes the default cost account for resource assignments to activities, default automatic activity numbering, default activity calendar, duration type, and percent complete type.

Resources

The **Resources** tab helps you to specify resources essential for the project and project level resource permission for the time sheet application. These permissions include allowing resources to assign themselves to activities and to report their activities and assignments when completed. The options in the **Specify the default Rate Type for new assignments** drop-down list of this tab are used to calculate cost for activities that have labor/non-labor units with no assigned resources/ roles and do not have prices.

Settings

The **Settings** tab enables you to view and specify the summarized information and project-level settings for the selected node or project. You can use the options in different fields of this tab to summarize data for an EPS or a project and to automatically perform summary calculations using summary services. This tab also includes the settings for the first month of the fiscal calendar, the character for separating code fields for the WBS hierarchy, and also the settings to define the critical activities.

Calculations

The **Calculations** tab enables you to calculate the cost and estimate usage of resources when the activities in the selected project are updated. In this tab, the **Resource Assignments** area has two radio buttons for keeping track of your budget. If you select the **Add Actual to Remaining** radio button, then the amount will be at true complete units/costs. If you want to keep track of the amount remaining before you exceed your budget, select the **Subtract Actual from At Completion** radio button.

Select the **Recalculate Actual Units and Cost when duration % complete changes** check box to automatically update the actual units and costs when the duration % complete is updated. To recalculate units when costs are updated for resource assignments, select the **Update units when costs change on resource assignments** check box. If you want to store past period actuals in the **Store Period Performance** dialog box, then select the **Link actual to date and actual this period units and costs** check box.



Note

You need to specify the details in other tabs also. Specify all necessary information about the project in these tabs.

WORKING WITH THE OBS

The OBS, Organizational Breakdown Structure, is a hierarchical division of different project responsibilities between different managers in an organization. The OBS reflects the management structure of an organization from top-level personnel down, as shown in the Figure 2-16.

Before starting a project, you need to identify the tasks included in a project and the individuals or team who will carry out those tasks. The OBS is an intermediate step in this process, it helps in identifying the employees who will be responsible for the project work.

In Primavera P6, the OBS elements are associated with the EPS nodes and projects. Access and privileges are assigned to the WBS/Projects/ EPS nodes through the OBS. Typically, an OBS is set up with a project manager at the project level to oversee, coordinate and manage the entire project. You can associate the responsible managers with their areas of the EPS in either nodes or individual projects. A responsible manager associated to an EPS node by default gets associated to the projects under the branch of the EPS.

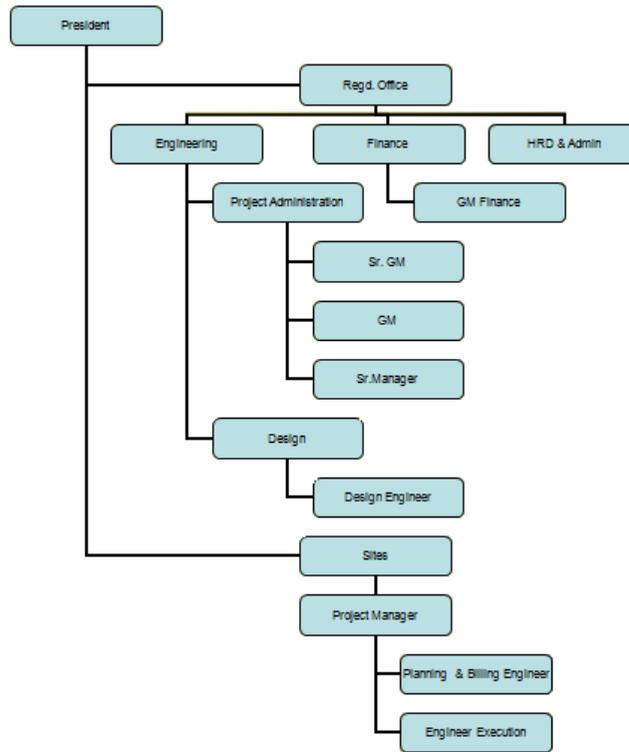


Figure 2-16 The flowchart displaying the hierarchy of a typical organization setup



Note

In Primavera P6, an OBS can have only one root element.

Adding OBS

Menu Bar: Enterprise > OBS

To create, view, and edit an OBS in Primavera P6, invoke the **Organizational Breakdown Structure** dialog box by choosing the **OBS** option from the **Enterprise** menu in the menubar. In this dialog box, you can view a list of the OBS elements which can be used in any desired project. You can display the OBS elements in two different ways, either by chart or table. Figure 2-17 shows the **Organizational Breakdown Structure** dialog box displaying the OBS in a tabular form.

You can create a new OBS by selecting the existing OBS element or node immediately above or at the same hierarchy level. To add a new element, choose the **Add** button; the new OBS element will be added under and at the same hierarchy level as of the selected OBS node.

You can specify all the information related to the created OBS by using the options available in the **General**, **Responsibility** tabs of the **Organizational Breakdown Structure** dialog box. These tabs are discussed next.

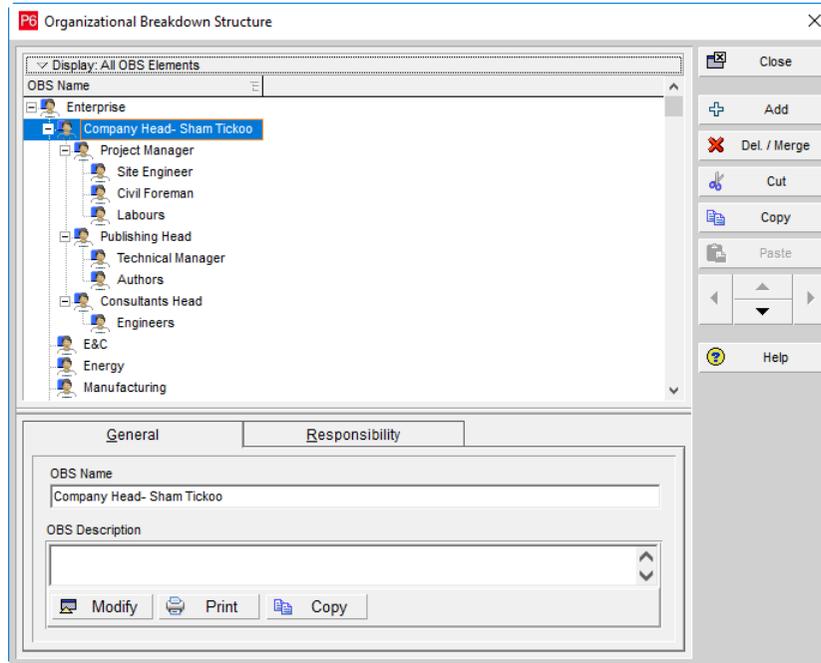


Figure 2-17 The *Organizational Breakdown Structure* dialog box

General

In the **General** tab, you can specify the name of the created OBS in the **OBS Name** edit box and if required you can provide description of the OBS in the **OBS Description** edit box. The editing tools displayed under the **OBS Description** edit box are used to format text, insert pictures, copy, and paste information from other document files, and to add hyper links.

Users

In the **Users** tab, you can view the users and corresponding security profiles affiliated with the OBS element. Also, if you have proper access rights then you can assign users to the OBS.

Responsibility

In this tab, the **Project ID/WBS Code** column lists the project ID/WBS code for which the selected OBS element is responsible. The **Project Name / WBS Name** column lists the project name and WBS name for which the selected OBS element is responsible.

You can also copy, paste, and delete an OBS. To do so, select the desired OBS element, choose the **Copy** button; the desired OBS will be copied and then select the OBS to which you want to add the copied OBS element and choose the **Paste** button. The copied OBS element will be added to the desired OBS. Similarly, you can cut and paste an OBS element.



You can also delete an OBS element. To do so, select the required OBS and choose the **Del. /Merge** button from right pane of the **Organizational Breakdown Structure** dialog box; the selected OBS element will be deleted.



TUTORIALS

Tutorial 1

Creating EPS and OBS

In this tutorial, you will create EPS and OBS for a project.

(Expected time: 30 min)

The following steps are required to complete this tutorial:

- a. Open the **Projects** window.
- b. Create EPS.
- c. Assign OBS.
- d. Create a new project.

Opening the Projects Window

1. Open Primavera P6 and invoke the **Projects** window by choosing the **Projects** option from the **Enterprise** menu in the menubar.

Creating EPS

1. Choose the **Enterprise Project Structure** option from the **Enterprise** menu in the menubar; the **Enterprise Project Structure (EPS)** dialog box is displayed.
2. In the **Enterprise Project Structure (EPS)** dialog box, select the topmost EPS node under which the new EPS element is to be added.
3. Next, choose the **Add** button from the right pane of the **Enterprise Project Structure (EPS)** dialog box; a new EPS with the name **NEWEPS** is added to the topmost EPS node, as shown in Figure 2-18.

Opening the Projects Window

1. Open Primavera P6 and invoke the **Projects** window by choosing the **Projects** option from the **Enterprise** menu in the menubar.

Creating EPS

1. Choose the **Enterprise Project Structure** option from the **Enterprise** menu in the menubar; the **Enterprise Project Structure (EPS)** dialog box is displayed.
2. In the **Enterprise Project Structure (EPS)** dialog box, select the topmost EPS node under which the new EPS element is to be added.
3. Next, choose the **Add** button from the right pane of the **Enterprise Project Structure (EPS)** dialog box; a new EPS with the name **NEWEPS** is added to the topmost EPS node, as shown in Figure 2-18.

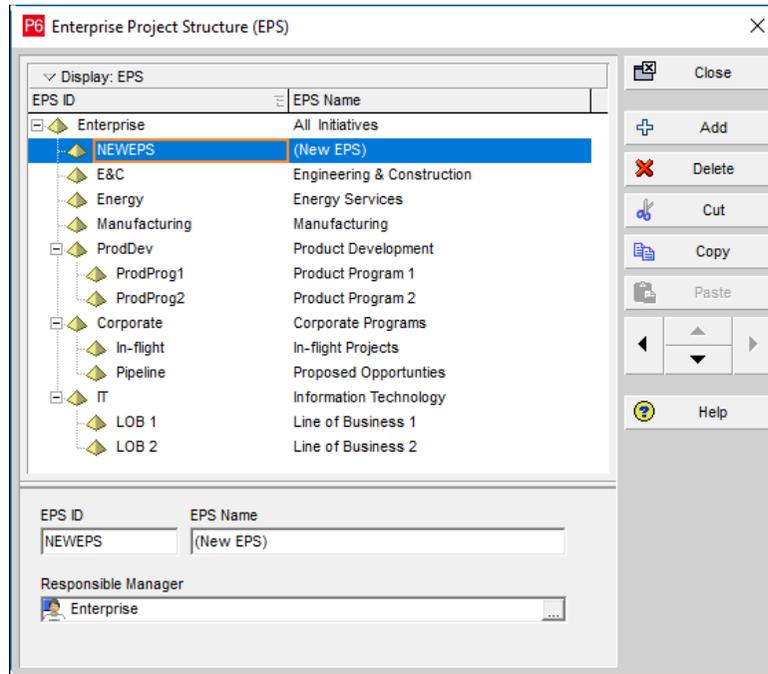


Figure 2-18 A new EPS added under the topmost EPS node in the Enterprise Project Structure (EPS) dialog box

4. Click on **NEWEPS** in the **EPS ID** column and rename it to **CADCIM**. Change the name of the **EPS** in the **EPS Name** column to **CADCIM Technologies** and press ENTER.
5. Ensure that the **CADCIM** EPS is selected and then choose the **Shift Left** button from the Command bar; the **CADCIM** EPS node is now an independent node.
6. Next, choose the **Shift Up** button from the Command bar; the node is shifted on top, as shown in Figure 2-19.
7. Ensure that the **CADCIM** EPS is selected and then choose the **Add** button; a new EPS node is added under the **CADCIM** EPS.
8. Double-click on the **NEWEPS** node in the **EPS ID** column and change the ID of the created EPS to **Construction** and **EPS Name** to **Construction Division**.
9. Similarly, add two more EPSs under the **CADCIM** head with the **EPS ID** as **Publishing**, and **Consultancy** respectively and the **EPS Name** as **Publishing Division**, and **Consultancy Division** respectively, refer to Figure 2-20.
10. Choose the **Close** button from the right pane of the dialog box to close the **Enterprise Project Structure (EPS)** dialog box.

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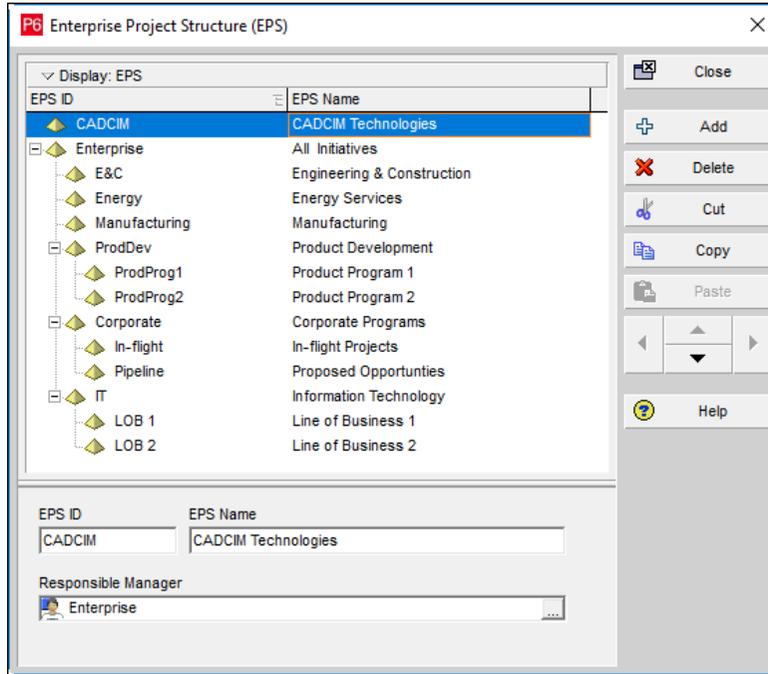


Figure 2-19 The CADCIM EPS node displayed at the top

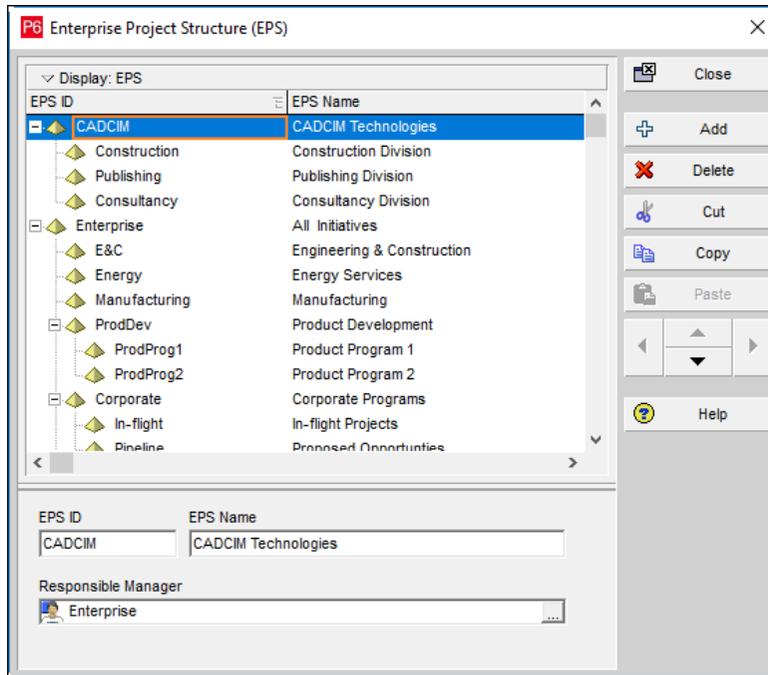


Figure 2-20 The CADCIM EPS node with further subnodes displayed

Creating OBS

1. Choose the **OBS** option from the **Enterprise** menu in the menubar; the **Organizational Breakdown Structure** dialog box is displayed.
2. Select the **Filter By > All OBS Elements** option from the **Display** drop-down list; all the OBS elements are displayed in the dialog box.
3. In this dialog box, select the topmost node and then select the **Add** button from the Command bar, a new OBS with the name **NEW OBS** is created.
4. Choose the **Shift Up** button to shift the newly created OBS to the top.
5. Rename the created OBS as **Company Head- Sham Tickoo** in the **OBS Name** edit box.
6. Choose the **Add** button, a new OBS is created. Choose the **Shift Right** button to shift the OBS to the right.
7. Add three more OBS under Company Head and ensure that all the added OBS are shifted to the right.
8. Rename the added OBS as **Project Manager**, **Publishing Head**, and **Consultants Head**, as shown in Figure 2-21.

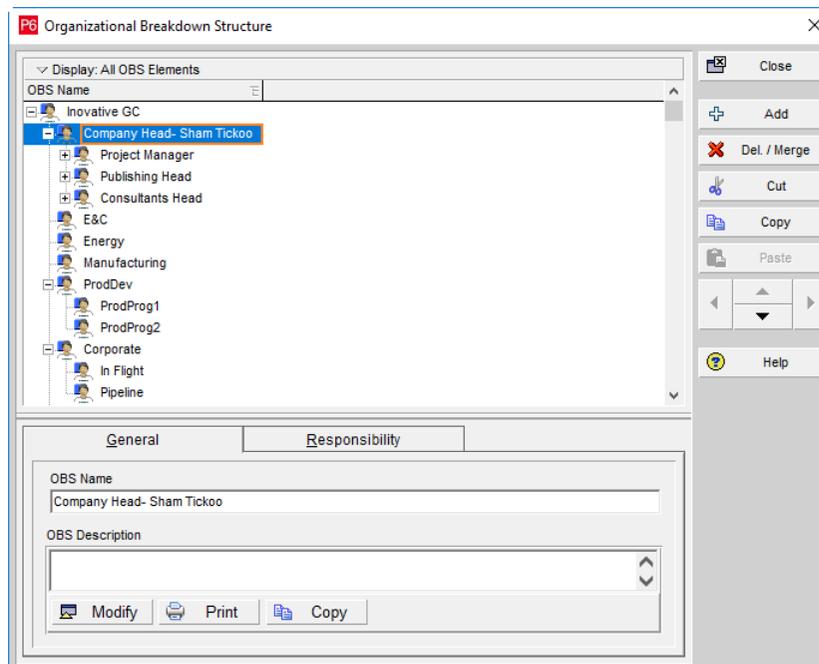


Figure 2-21 Organizational Breakdown Structure displayed with the structured OBS elements

9. Similarly, add more OBS in the order, as shown in Figure 2-22.

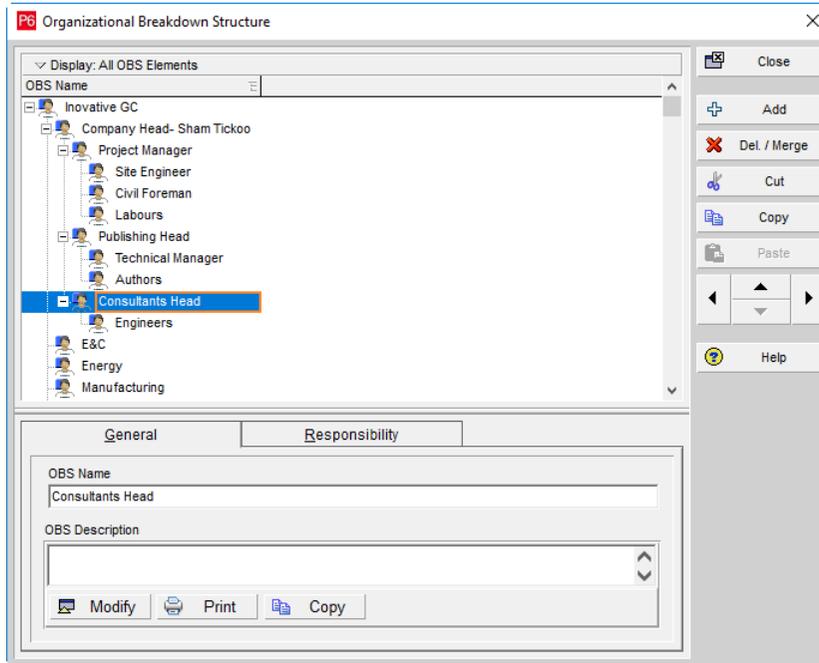


Figure 2-22 The Organizational Breakdown Structure is displayed with the complete structured OBS

10. Next, choose the **Close** button; the **Organizational Breakdown Structure** dialog box is closed and the **Projects** window is displayed.
11. Ensure that the **Construction Division** node is selected in the **Projects** window.
12. Now, choose the browse button adjacent to the **Responsible Manager** edit box in the **General** tab of the **Project Details** table; the **Select Responsible Manager** dialog box is displayed.
13. In this dialog box, select the **Company Head- Sham Tickoo** node from the OBS Name list.
14. Choose the **Select** button from the Command bar; the responsible manager is assigned to the construction division.
15. Similarly, assign **Company Head-Sham Tickoo** as the OBS to the **Publishing** and **Consultancy** division node.

The EPS and OBS are created and are saved in the Primavera P6.

Tutorial 2

Creating a Project

In this tutorial, you will create a project and will assign the OBS to the project. You must complete tutorial 1 before performing this tutorial. (Expected time: 45 min)

The following steps are required to complete this tutorial:

- a. Open the **Projects** window.
- b. Create a Project
- c. Export a Project.

Opening the Projects Window

1. Open Primavera P6 and invoke the **Projects** window by choosing the **Projects** option from the **Enterprise** menu in the menubar.

Creating a Project

1. In the **Projects** window, select the **Construction** EPS node from the **CADCIM** head. Choose the **Add** button from the Command bar; the **Create a New Project** wizard with the **Select EPS** page is displayed, as shown in the Figure 2-23.

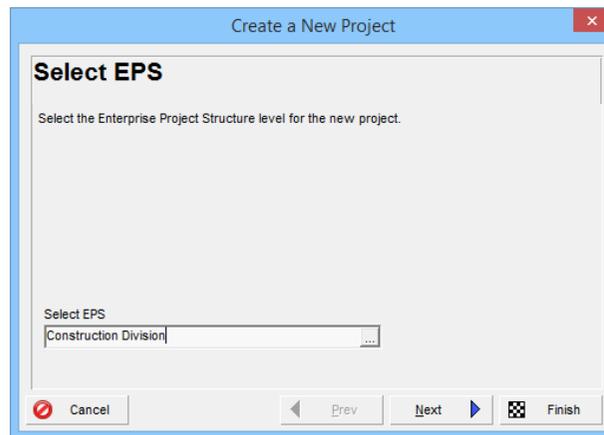


Figure 2-23 The Create a New Project wizard with the Select EPS page

2. In this **Select EPS** page, the **Construction Division** EPS is chosen by default. Keep the default settings in this page and choose the **Next** button; the **Project Name** page of the **Create a New Project** wizard is displayed.
3. In this page, specify **CD00720** as the project id and **Home Construction** as the project name in the **Project ID** and **Project Name** edit boxes, respectively.
4. Choose the **Next** button; the **Project Start and End Dates** page is displayed.

5. In the **Project Start and End Dates** page, choose the browse button located adjacent to the **Project Planned Start** edit box; a flyout calendar is displayed.
6. Using the flyout calendar, set the start date for the project to **29-Sep-18** and choose the **Select** button from the flyout.
7. Choose the **Next** button; the **Responsible Manager** page is displayed, as shown in Figure 2-24.

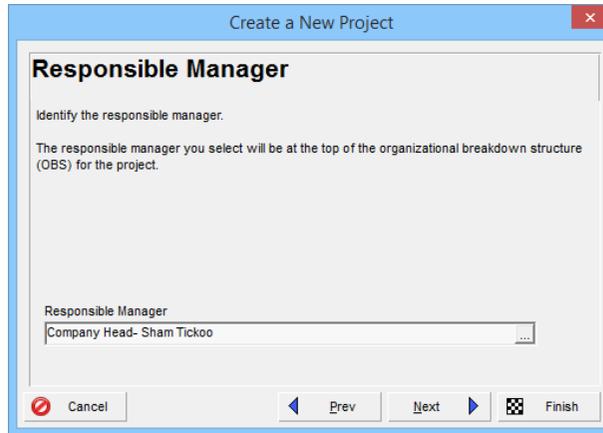


Figure 2-24 The Responsible Manager page of the Create a New Project wizard

8. Choose the browse button adjacent to the **Responsible Manager** edit box of this page; the **Select Responsible Manager** dialog box is displayed, as shown in Figure 2-25.

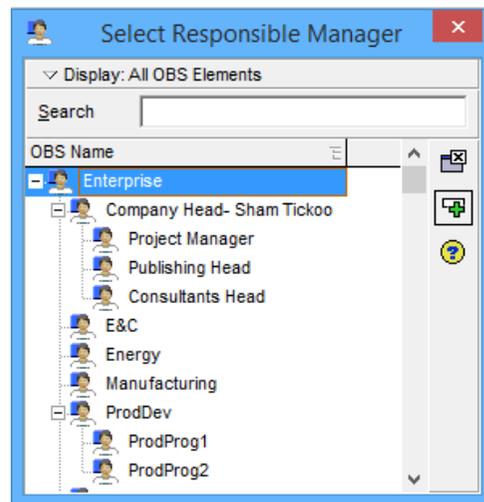
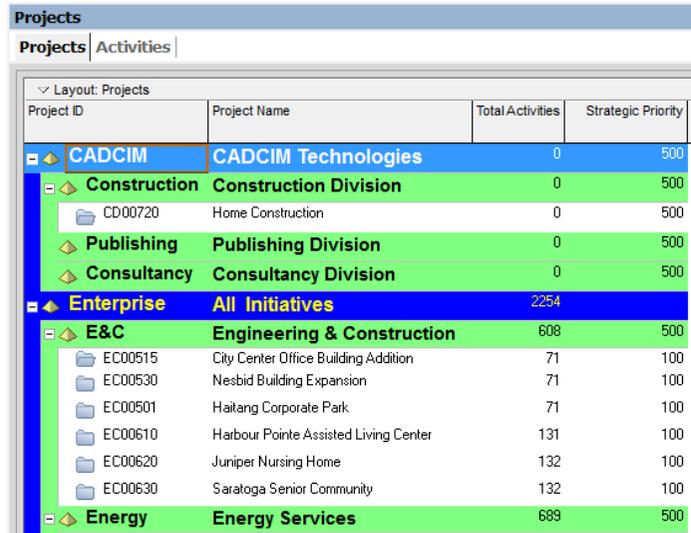


Figure 2-25 The Select Responsible Manager dialog box

9. If the elements are not displayed in this dialog box by default, select **Filter By > All OBS Elements** option from the **Display** drop-down list.

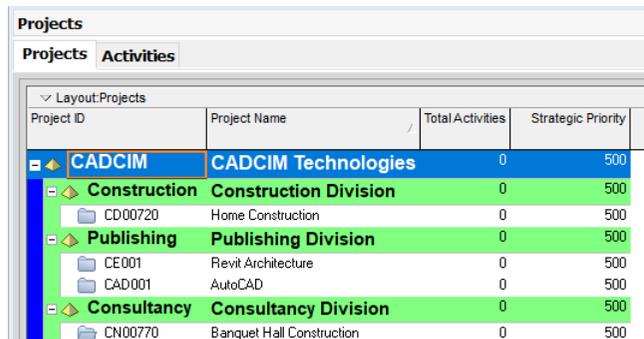
10. Select the **Project Manager** option in the **OBS Name** list and choose the **Select** button  from the right pane of the dialog box.
11. Choose the **Next** button in the **Responsible Manager** page of the **Create a New Project** wizard; the **Assignment Rate Type** page is displayed.
12. Retain all the default settings in this page and choose the **Next** button; the **Congratulations** page is displayed with the message that your new project has been created.
13. Choose the **Finish** button; the **Create a New Project** wizard is closed and the **Home Construction** project is added to the **Construction EPS**, as shown in Figure 2-26.



Projects			
Layout: Projects			
Project ID	Project Name	Total Activities	Strategic Priority
▶ CADCIM	CADCIM Technologies	0	500
▶ Construction	Construction Division	0	500
CD00720	Home Construction	0	500
▶ Publishing	Publishing Division	0	500
▶ Consultancy	Consultancy Division	0	500
▶ Enterprise	All Initiatives	2254	
▶ E&C	Engineering & Construction	608	500
EC00515	City Center Office Building Addition	71	100
EC00530	Nesbid Building Expansion	71	100
EC00501	Haitang Corporate Park	71	100
EC00610	Harbour Pointe Assisted Living Center	131	100
EC00620	Juniper Nursing Home	132	100
EC00630	Saratoga Senior Community	132	100
▶ Energy	Energy Services	689	500

Figure 2-26 The Home Construction project added under the CADCIM EPS

Similarly, create more projects for the **Publishing** and **Consultancy Division**, refer to Figure 2-27.



Projects			
Layout: Projects			
Project ID	Project Name	Total Activities	Strategic Priority
▶ CADCIM	CADCIM Technologies	0	500
▶ Construction	Construction Division	0	500
CD00720	Home Construction	0	500
▶ Publishing	Publishing Division	0	500
CE001	Revit Architecture	0	500
CAD001	AutoCAD	0	500
▶ Consultancy	Consultancy Division	0	500
CN00770	Banquet Hall Construction	0	500

Figure 2-27 All projects added under the CADCIM EPS

14. Repeat the procedure followed in step 1 through step 13 and assign **15 December, 2018** as the start date and **31 July, 2018** as end date to the projects under the **Publishing Division** node.

16. For **Consultancy Division** project, enter **5th November, 2018** in the **Project Planned Start** edit box.
17. In the **General** tab of the **Projects** page, choose the **Browse** button next to the **Responsible Manager** edit box and assign **Author** as **Responsible Manager** for the **Publishing Division** and **Engineers** for the **Consultancy Division**.

Primavera P6 automatically saves the created EPS and project.

Exporting Projects

Export projects to save the project file for future reference.

1. To export the **Home Construction** project, ensure that the **Home Construction** project is opened in Primavera P6. If not, then select the **Home Construction** project from the **Projects** window and right-click; a menu is displayed. Choose the **Open Project** option from the menu.
2. Now, choose the **Export** option from the **File** menu; the **Export** wizard with the **Export Format** page is displayed.
3. In this page, ensure that the **Primavera PM - (XER)** radio button is selected and then choose the **Next** button; the **Export Type** page is displayed.
4. In this page, ensure that the **Project** radio button is selected and then choose the **Next** button; the **Projects To Export** page is displayed.
5. Make sure the **Home Construction** project is displayed in this page, as shown in Figure 2-28. Choose the **Next** button; the **File Name** page is displayed.

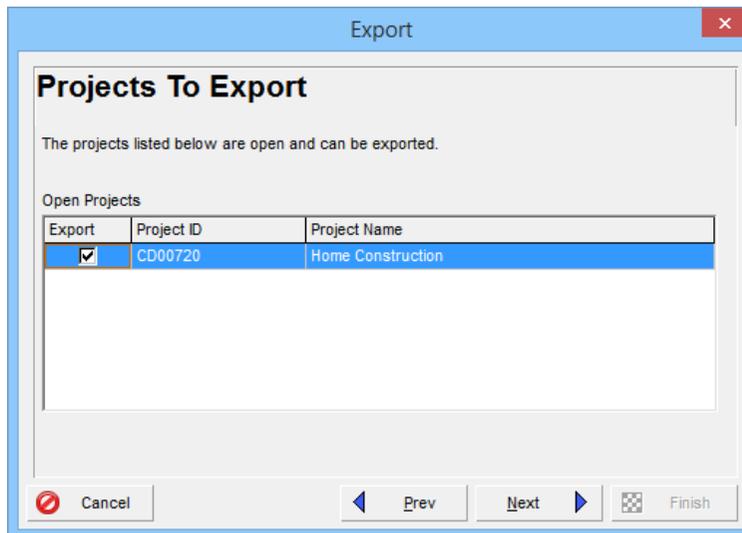


Figure 2-28 The Home Construction project displayed in the Projects To Export page

6. In this page, choose the Browse button adjacent to the **File Name** edit box; the **Save File** dialog box is displayed, as shown in Figure 2-29.

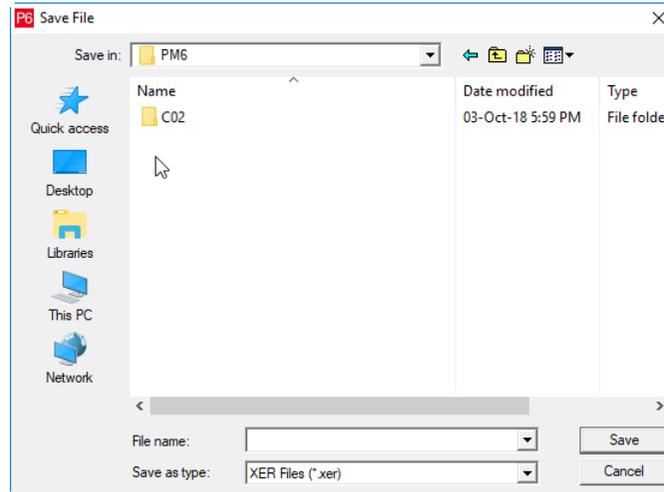


Figure 2-29 The Save File dialog box

7. In this dialog box, browse to the C drive and then create a folder with the name *PM6*.
8. Open the folder *PM6* and then create a sub-folder with the name **c02**. Next, open the created folder and save the file with the name *c02_CONS_Home_tut02* and then choose the **Save** button.
9. Choose the **Finish** button; the **Export Result** page is displayed with the message that the export was successful.
10. Choose the **Close** button; the file is exported.
11. Similarly, export other projects and save them at the same location with the name as mentioned below.
- AutoCAD- **c02_PUB_CAD_tut02**
 Revit Architecture- **c02_PUB_Archi_tut02**
 Banquet Hall Construction- **c02_CN_BNQT_tut02**

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 tabs of the **Organizational Breakdown Structure** dialog box, you can specify the name and description of the OBS?
- (a) **General** (b) **Users**
 (c) **Responsibility** (d) none of the above

2. In the **Project Details** table, which of the following tabs enables you to view and specify the summarization information and project-level settings for the selected node or project?

(a) Resources	(b) Notebook
(c) Settings	(c) Calculations
3. In which page of the following pages of the **Create a New Project** wizard, you can specify the project's proposed start and finish dates?

(a) Select EPS	(b) Responsible Manager
(c) Project Name	(d) Project Start and End Dates
4. In the **Project Details** table, which of the following tabs enables you to specify resources essential for the project?

(a) Notebook	(b) Budget Log
(c) Codes	(d) Resources
5. An EPS can further be sub-divided into many _____ according to work in the organization.
6. The _____ page of the **Create a New Project** wizard specifies the rate type you want to use to calculate costs for the assignments in your project.
7. On choosing the **Paste** button from the Command bar, the _____ dialog box is displayed.
8. The nodes in the EPS represent the levels within the projects. (T/F)
9. In Primavera P6, access and privileges to the WBS/Projects/ EPS nodes are assigned through the OBS. (T/F)
10. The status of a project is shown by marking it **Active** if it is not completed and **Inactive** when it gets completed. (T/F)

Review Questions

Answer the following questions:

1. In the **Project Details** window, which of the following tabs helps you in assigning notebook topics, details, and description to the selected node or project?

(a) Calculations	(b) Notebook
(c) Defaults	(d) General
2. You can invoke the **Organizational Breakdown Structure** dialog box by choosing the **OBS** option from the _____ menu in the menubar.

3. In the _____ page of the **Create a New Project** wizard, you can specify the **EPS** under which you want to add the project.
4. To invoke the **Enterprise Project Structure** dialog box, choose the _____ option from the **Enterprise** menu in the menubar.
5. The **EPS** nodes that contains subnodes and projects are identified by a _____ symbol.
6. You can use the _____ button from the Command bar of the **Enterprise Project Structure (EPS)** dialog box to indent/outdent a node to mark its placement in the **EPS** and to move a node up and down in the hierarchy.
7. The **Calculations** tab enables you to calculate cost and estimate resources to be used when you update activities in the selected project. (T/F)
8. You can add activities to your new project by using the methodologies available in **Methodology Management** module of Primavera P6 by running the project architect. (T/F)
9. When you delete an **EPS** node, all the projects under that branch of hierarchy will also be removed. (T/F)
10. You can use the template of an existing node or project to create a new one by copying the existing node or project. (T/F)

EXERCISES

Exercise 1

Create an Enterprise Project Structure (EPS), as shown in Figure 2-30 and Figure 2-31 and Organizational Breakdown Structure, as shown in Figure 2-32 for an enterprise of construction department. Assume the name of the enterprise as ABC Technologies. **(Expected time: 30 min)**

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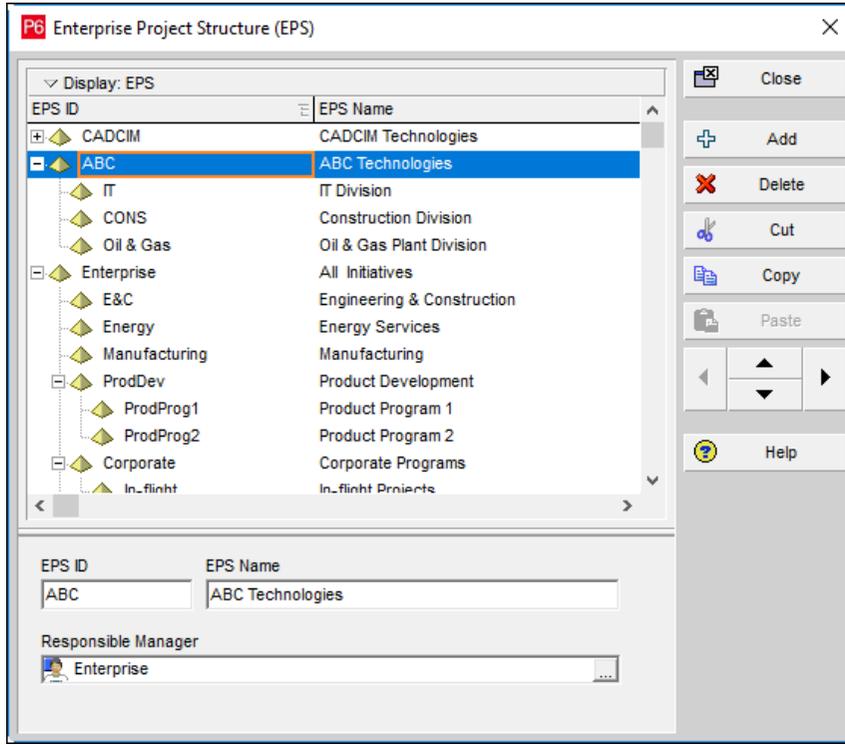


Figure 2-30 The Enterprise Project Structure (EPS) dialog box with the ABC EPS

Project ID	Project Name	Total Activities	Risk Level	Strategic Priority
CADCIM	CADCIM Technologies	0	3 - Medium	500
ABC	ABC Technologies	0	3 - Medium	500
IT	IT Division	0	3 - Medium	500
CONS	Construction Division	0	3 - Medium	500
Oil & Gas	Oil & Gas Plant Division	0	3 - Medium	500

Figure 2-31 The EPS created in the Projects window

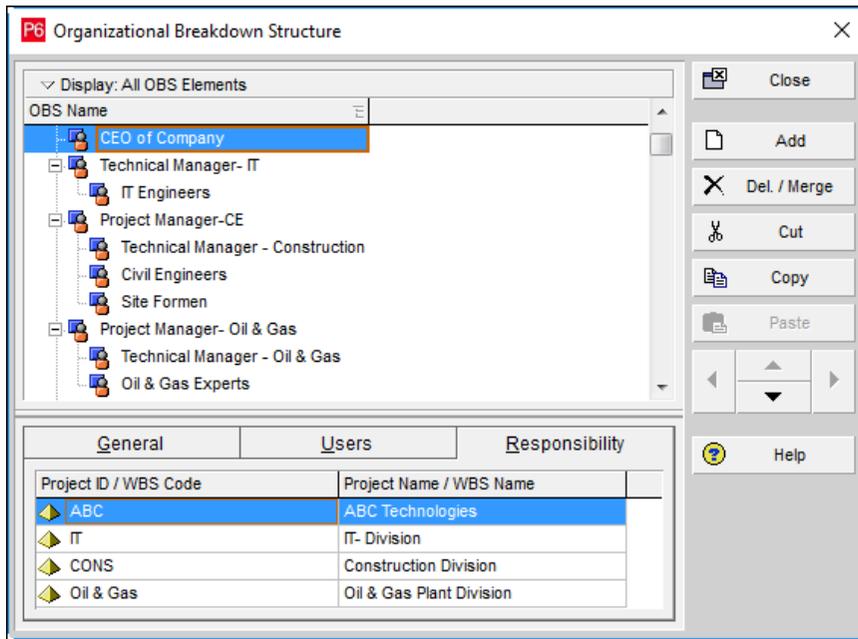


Figure 2-32 The OBS created for ABC Technologies project

Exercise 2

Create projects for the ABC Technologies under different EPS, as shown in Figure 2-33. You can download project files related to these projects from the www.cadcim.com.

(Expected time: 45 min)

1. IT Division

- a. Project I
 - Project Name** Android Application Development
 - Project ID** AAD001
 - Project Start Date** 22-Sep-18
 - Responsible Manager** IT Engineers
 - Save File** c02_IT_App_ex02

- b. Project II
 - Project Name** Web Designer Java
 - Project ID** WD002
 - Project Start Date** 25-Aug-18
 - Responsible Manager** IT Engineers
 - Save File** c02_IT_WEB_ex02

2. Construction Division

- Project Name** Hospital Building Project
- Project ID** CD00770
- Project Start Date** 05-Nov-18
- Responsible Manager** Technical Manager - Construction
- Save File** c02_CONS_HOSP_ex02

3. Oil & Gas Power Plant

- a. Project I **Project Name** XYZ Oilfield project
 Project ID XYZ004
 Project Start Date 15-Dec-18
 Responsible Manager Technical Manager- Oil & Gas
 Save File c02_O&G_XYZ_ex02
- b. Project II **Project Name** CSZ Gasfield project
 Project ID CSZ005
 Project Start Date 20-Oct-18
 Responsible Manager Technical Manager- Oil & Gas
 Save File c02_O&G_CSZ_ex02

Project ID	Project Name	Total Activities	Risk Level	Strategic Priority
ABC	ABC Technologies	0	3 - Medium	500
IT	IT- Division	0	3 - Medium	500
WD002	Web Designer Java	0	3 - Medium	500
AAD001	Android Application Designer	0	3 - Medium	500
CONS	Construction Division	0	3 - Medium	500
CNO0770	Hospital Building Project	0	3 - Medium	500
Oil & Gas	Oil & Gas Plant Division	0	3 - Medium	500
CSZ005	CSZ Gasfield	0	3 - Medium	500
XYZ004	XYZ Oilfield	0	3 - Medium	500

Figure 2-33 The projects created in the Projects window

Answers to Self-Evaluation Test

1. a, 2. c, 3. d, 4. d, 5. nodes, 6. Assignment Rate Type, 7. Copy Project Options, 8. T, 9. T, 10. T