Primavera P6 Campus User Guide

UC/CSU/IOU 2009-2011 Energy Efficiency Partnership

Version 1.2

In the 2009-11 UC/CSU/IOU Partnership Program Cycle it will be mandatory for all campuses to maintain project schedules in the web-based project scheduling tool, Primavera P6.

This document serves as a guide to schedule management in Primavera P6. It contains instructions for logging on, creating a project schedule from existing templates, and updating the progress of projects.

For questions about Primavera or project scheduling requirements please contact:

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User Guide Overview

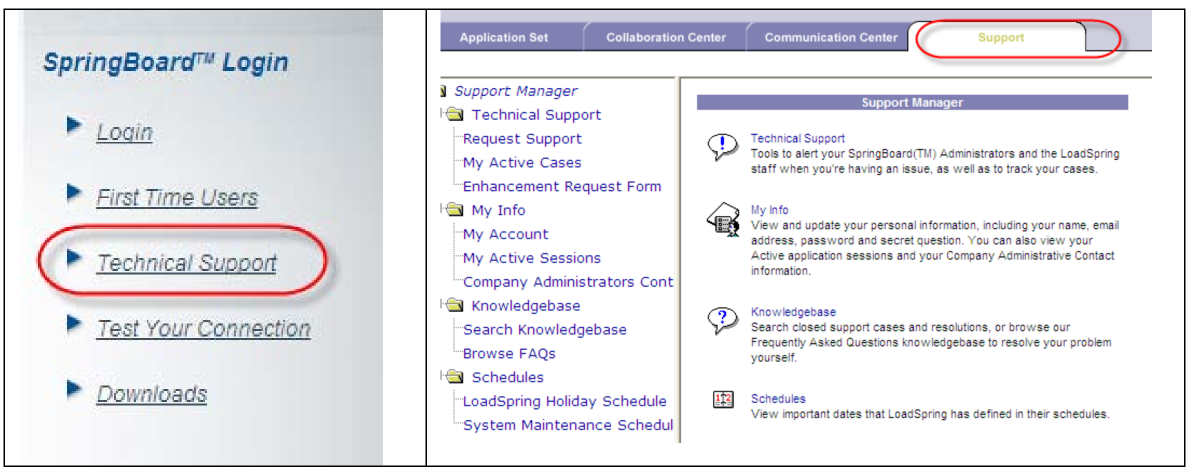
This document has been developed to assist with the UC/CSU/IOU Partnership Program Management project reporting web site. The Partnership has implemented the Primavera P6 project controls solution to track and manage the partnership projects.

The User Guide provides information on the following topics:

1. Web Site Login
2. Dashboards (Project-level information for each system, campus, and utility)
    a. My Reports
    b. Project Notebooks
3. Open a Project Schedule
4. Create a New Project
5. Update the Project Schedule
    a. Activities Views
    b. Baselines
6. Help Section

Contact Information

LoadSpring Solutions hosts the application and database. If you have problems accessing the application, contact them through the LoadSpring Console Login screen, or if you are already logged in, you can access the Support tab to request Support



The Newcomb Anderson McCormick program support team should be your first contact for assistance.

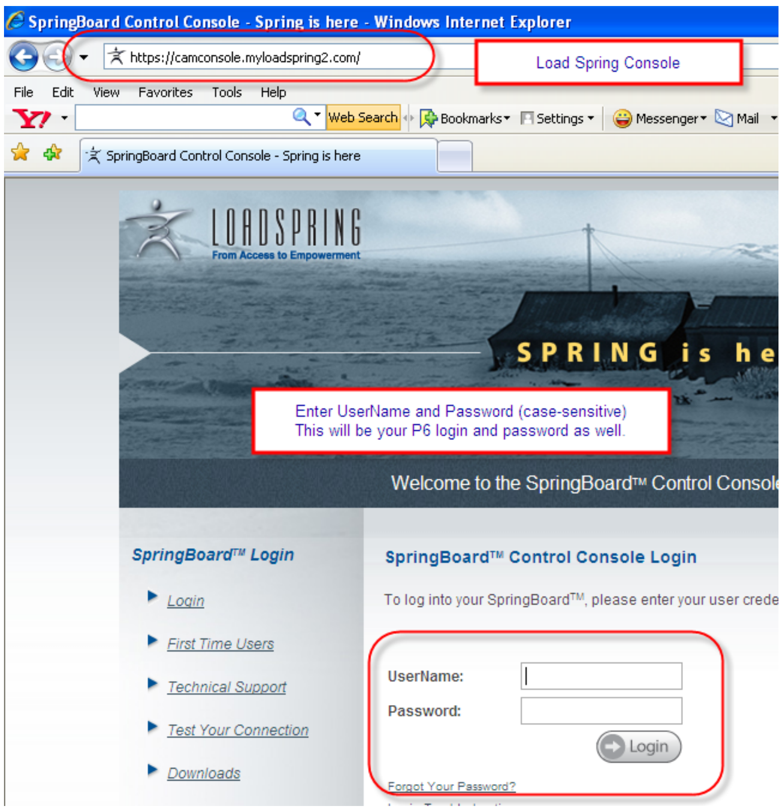
Your SpringBoard(TM) Administrator(s) should be your first contact for technical support. We recommend using the Request Support tool to notify them of your issue. If your administrator(s) is unable to help you, please contact LoadSpring Solutions, Inc. Technical Support.

Administrative Contacts			
Administrator	**E-mail Address**	**Phone Number**	**Administrator Type**
Carmen King	carmen_king@newcomb.cc	415-290-2721	Company Admin
Russell Driver	russell_driver@newcomb.cc	415-896-0300	Company Admin

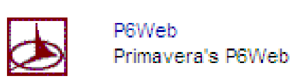
Login to the Application

The Primavera application is accessible through the LoadSpring web site. The user name and password for LoadSpring is the same as the Primavera login/password.

https://camconsole.myloadspring2.com/

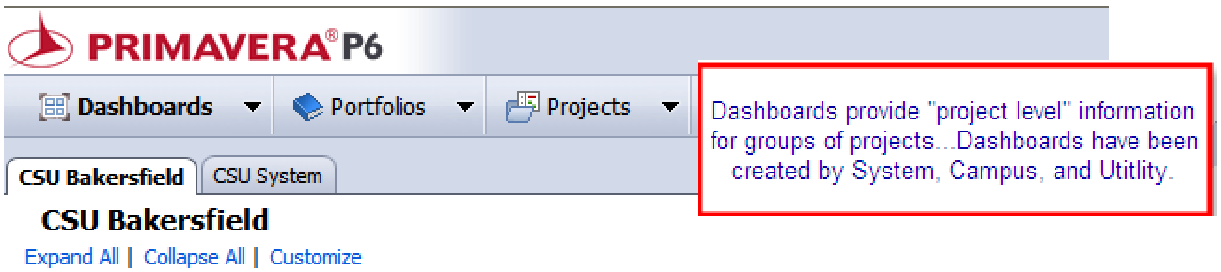


Click on the P6 Web application. Enter the login and password. Click "Login"

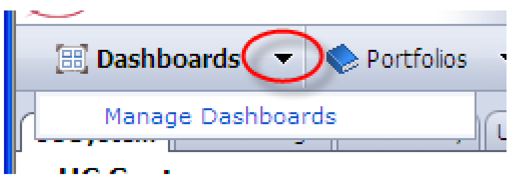


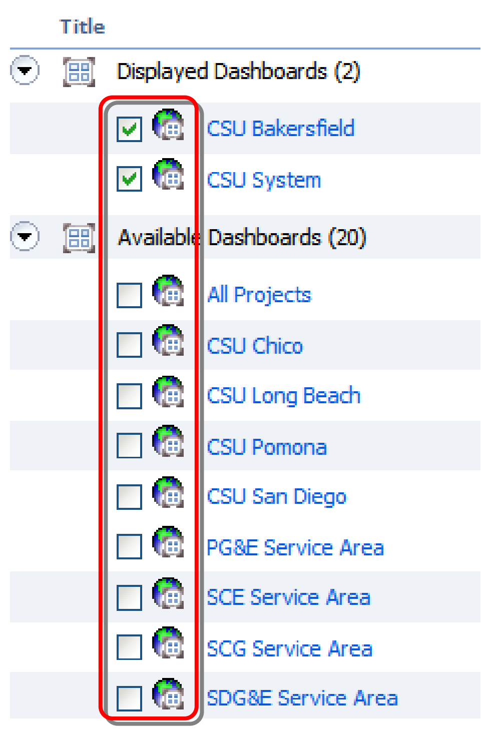
Dashboards

The Dashboards Home page displays portlets that contain information about the portfolios, projects, resources, and activities specific to you. The information you can view is controlled by licensing and security settings, administrator configuration and user interface view settings, your assignments to activities, your filtering criteria, and the customized content and layout you select.

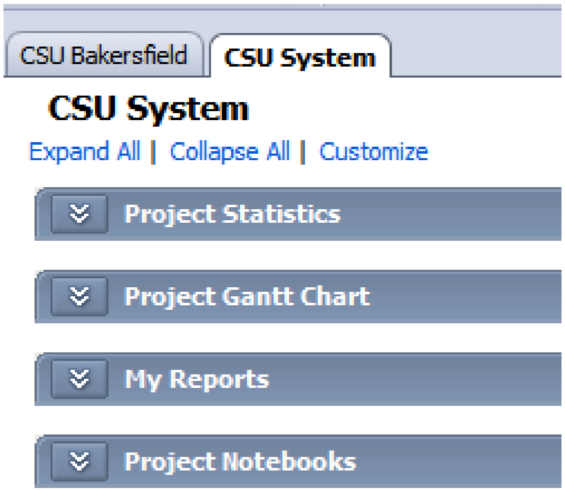


Dashboards have been created for each System, Campus, and Utility. Dashboards are available to all users, however, data is available based on project security levels. Click the drop-down next to the Dashboards Menu to “Display” or “Hide” dashboards.





The standard dashboard contains the following portlets of information.



Project Statistics columns contain project information such as Project App Number, Project Manager, Program Year, etc.

Project Gantt Chart is a single summary bar showing start and finish dates for the project. Expand the project to show Project Milestones.

My Reports allows the user to schedule and view pre-defined "tabular" reports. The data in the reports is based on the dashboard filter.

Project Notebook allows user to write notes about a project by assigning various notebook topics. Notes can be used to provide details about progress updates, explain schedule delays, etc.

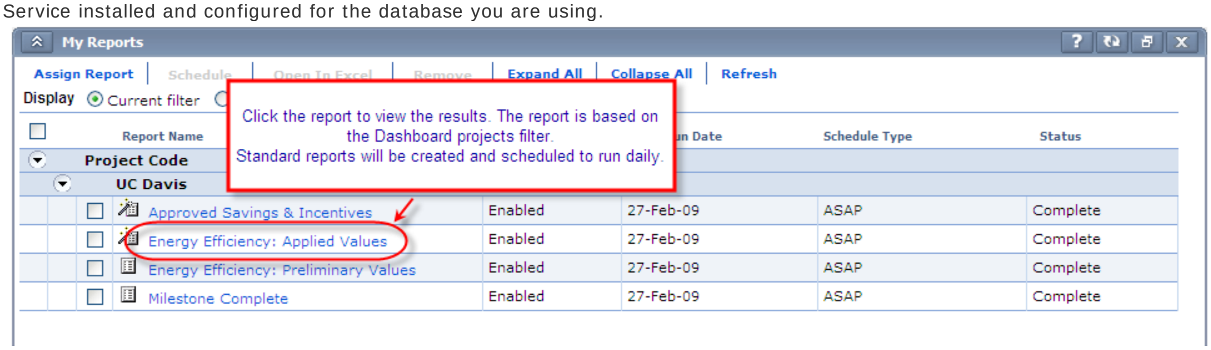
My Reports

The My Reports portlet enables you to add an unlimited number of reports created in the Project Management module to the portlet. Once added, you can schedule reports to run at specific time intervals, and then view reports in HTML format or in Microsoft® Excel.

Tip: The "No data available" message is displayed when you have not added any reports to the portlet.

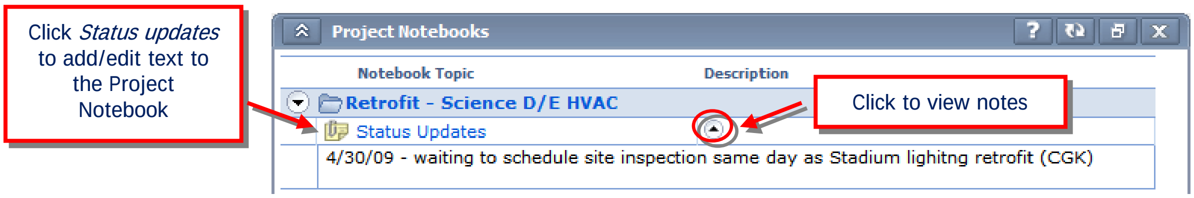
You can schedule recurring reports that run periodically at a certain date, or you can schedule a report to run once. When you schedule a report, the portlet submits the job request to the Primavera Job Service. The Job Service processes the request at the scheduled time and runs the report. Keep in mind that the Job Service runs the reports by logging in as the user who schedules the report. Thus, user security and access settings always apply, and the same report might not return the same data for users with different privileges.

Tip: To schedule reports, you must have the required security privilege and you must also have the Primavera Job Service installed and configured for the database you are using.



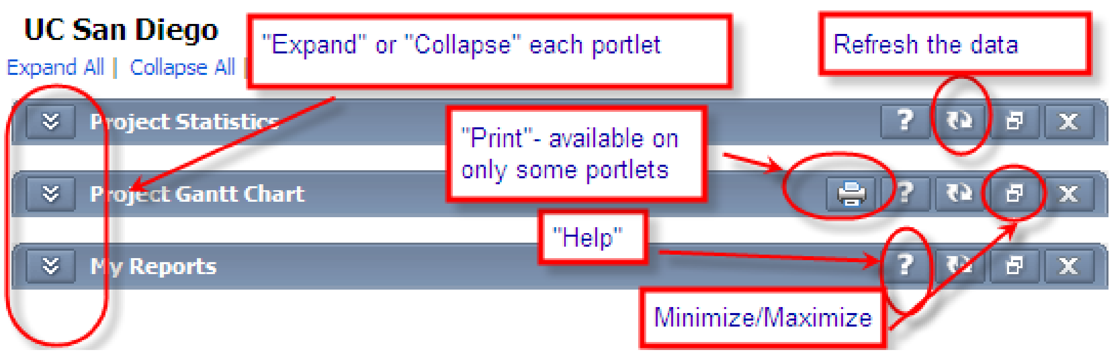
Project Notebooks

The "Project Notebooks" portlet enables you to view/edit notes for each project. See section on Assign Notebook Topics for information for how to create a project notebook.



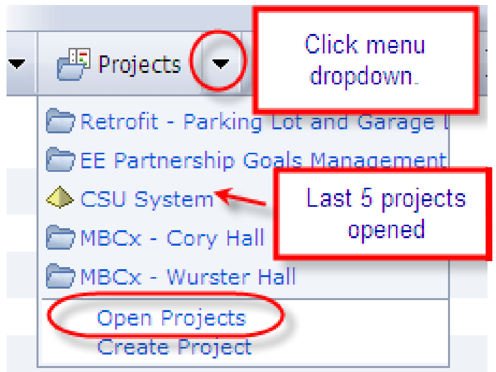
Dashboard Portlet Navigation Command

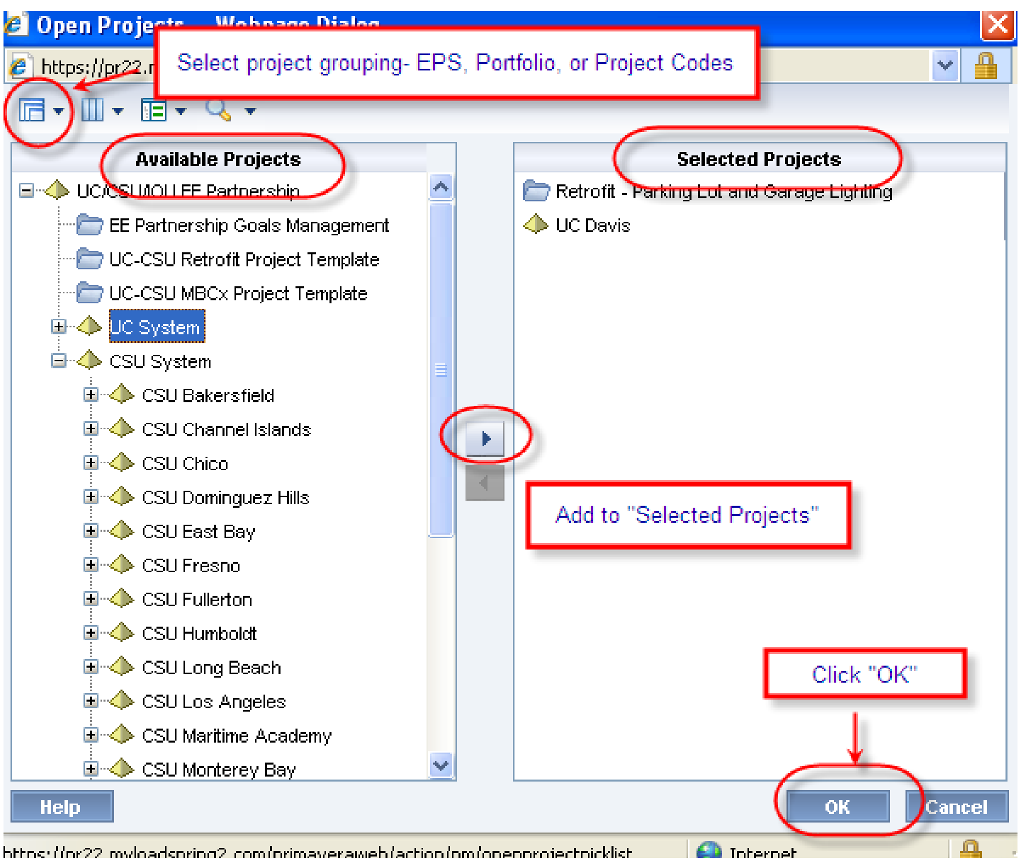
Each "portlet" of information contains basic navigation commands to improve the manner in which the information is displayed.



Open Project Schedule

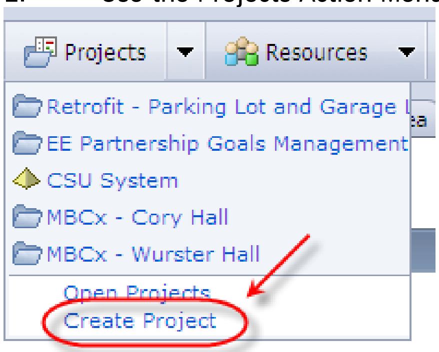
The dashboard provides "project-level" information only. If you want to view data on a specific project or multiple projects, you will need to "open" those projects. The projects action drop-down will display the last 5 projects opened, or you can open other projects through the selection dialog box. Selection of a "node" (System or Campus) will open all projects within that "node".



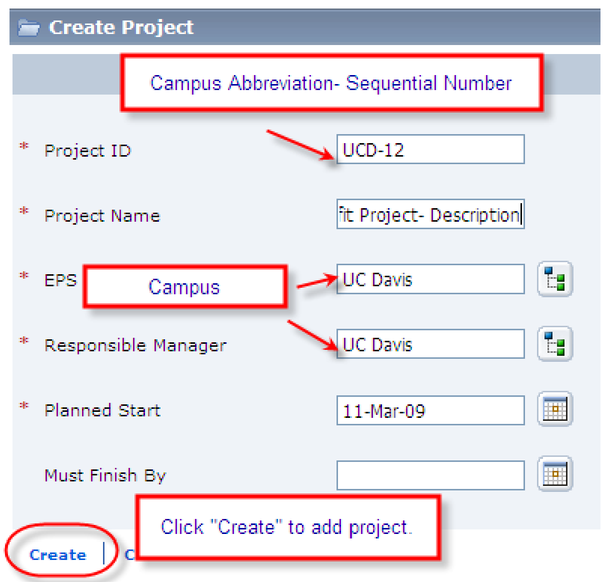


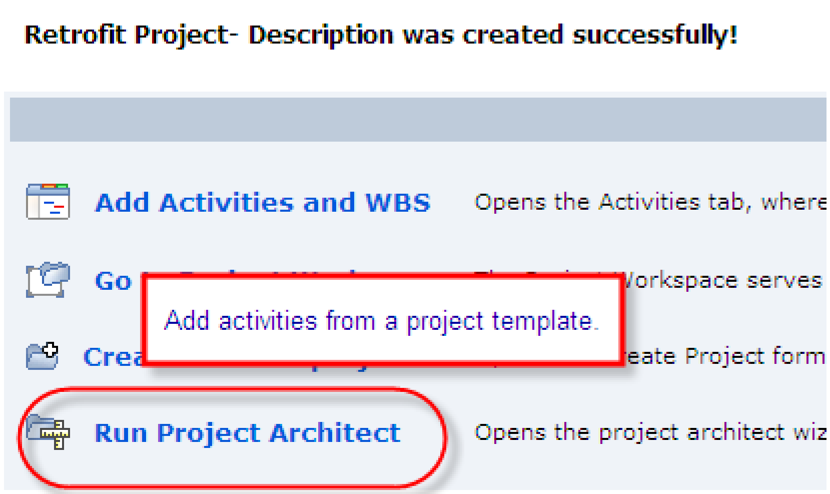
Create a New Project Schedule

1. Use the Projects Action Menu to select "Create Project".

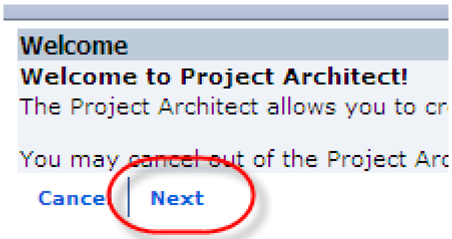


2. Enter the Project "Planned Start" date… this will be used as the project data date when the project schedule is calculated.

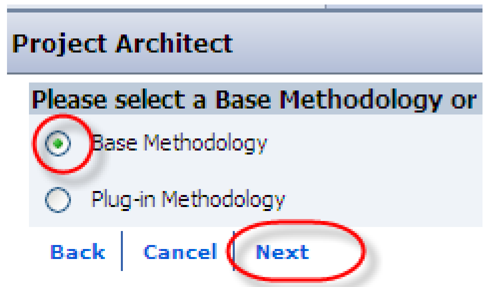




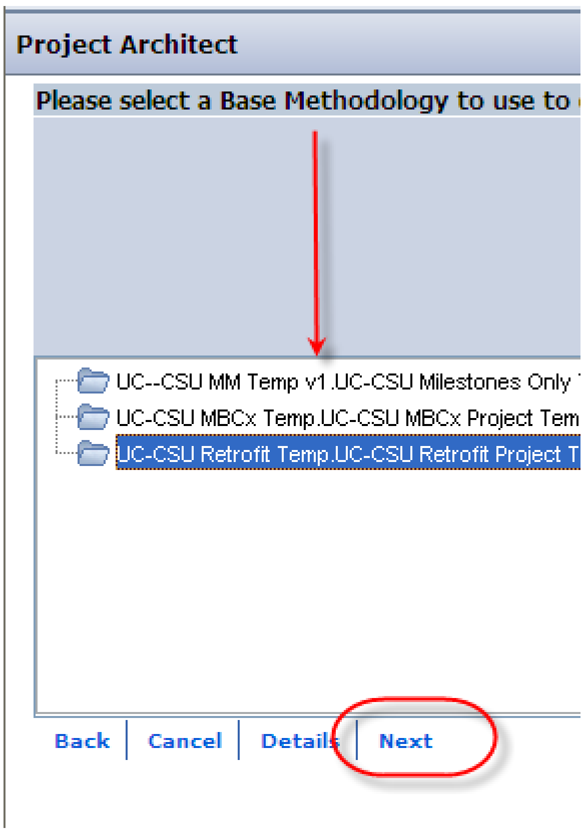
3. Click "Next"



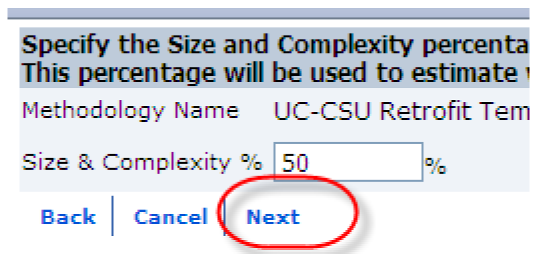
4. Select "Base Methodology" and Click "Next".



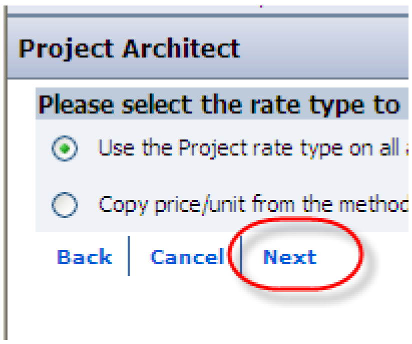
5. Select a Template



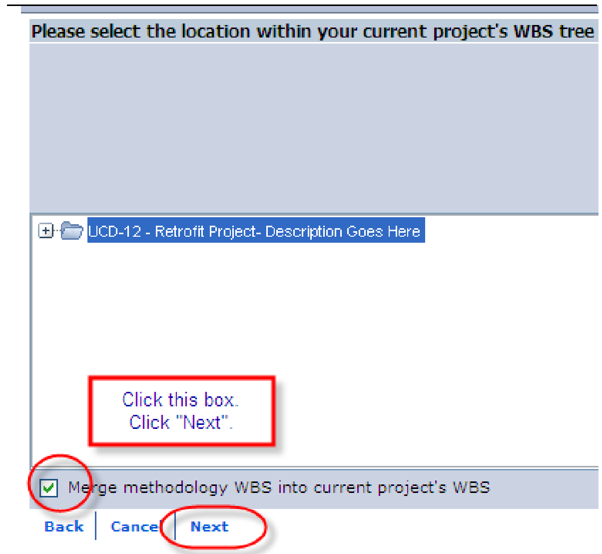
6. Leave at 50%. Click "Next"



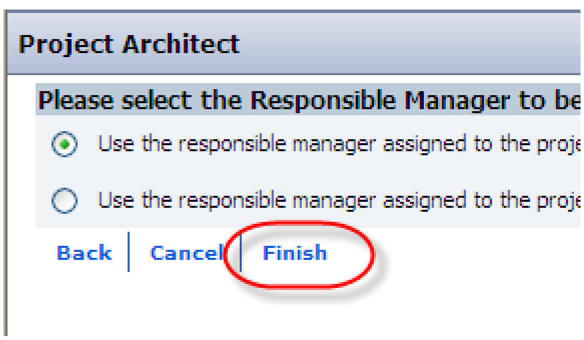
7. Click “Next”.



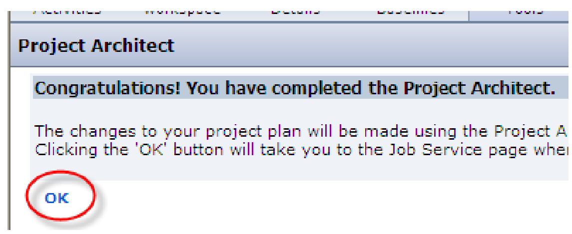
8. Select the location in the current schedule.
9. Check the “Merge Methodology WBS into current project”.
10. Click “Next.



11. Click “Finish”



12. Click “OK”

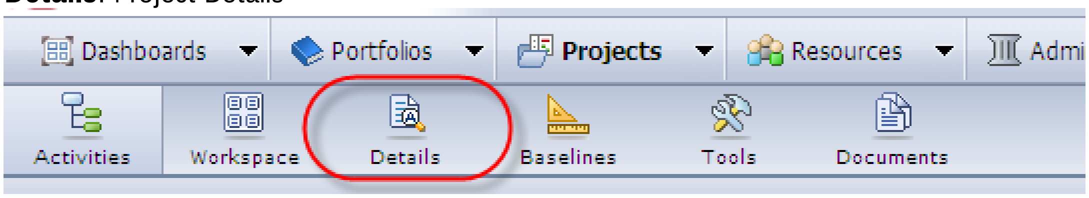


The new project schedule is created from the template. The new schedule will need to be “customized” for the specific project. The schedule is not calculated automatically when created through Project Architect. Adjustments to the schedule will be made and then “recalculated” to determine schedule activity dates.

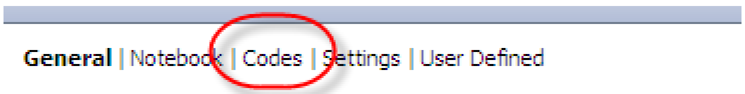
Projects

The Projects section is where individual projects or groups of projects can be tracked and managed. In the typical view, the user will see the following Project "Tabs":

Details: Project Details

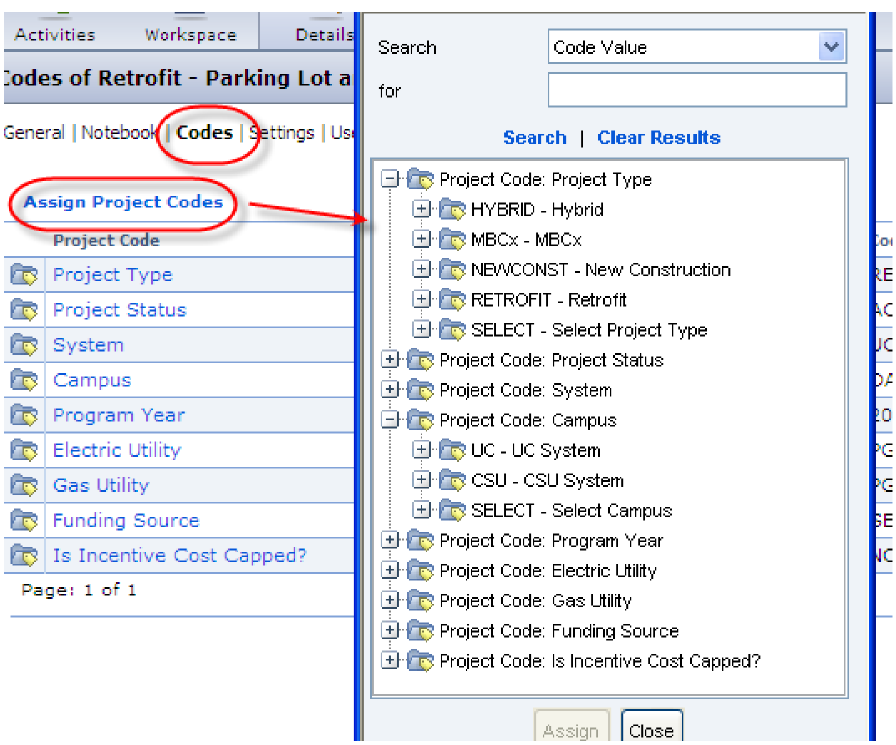


The Details section contains the following information:

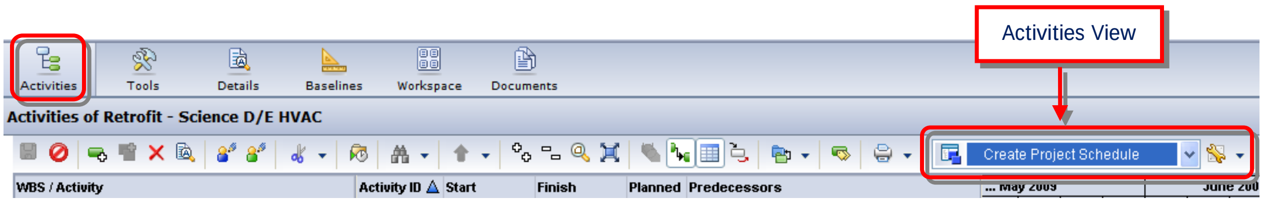


Project Codes are used for project reporting and filtering of projects. When you create a project, you will need to add the following project codes:

1. Select "Details.
2. Select "Codes".
3. Click "Assign Project Codes".
4. Select the appropriate code value for each of the Project Codes. Click "Assign" after each selection.
5. If the Project Code is already listed, click on the Project Code and you can assign the project code from there.



Activities: This is the typical "Gantt Chart" or schedule view of a single project or multiple project schedules. The data is formatted using "Activities Views". Several Activities Views have been created and are available to all users. Each user can create a view that is user-specific and only available to that user. Global views created include the following: Create Project Schedule, Preliminary Data Entry, Progress Updates, and Savings… additional global views will be created as needed.



Baselines- Add, Assign project baseline schedules. A "baseline" is a copy of the project schedule at any point in time. A baseline will be created when the project schedule is first approved and each time a progress update is completed. Each project can have an unlimited number of baselines. Add baseline will create a new baseline. Assign baseline will determine which baseline schedule is used to compare to the current schedule.

Tools- Schedule the Project, Run Project Architect, and Summarize the Project

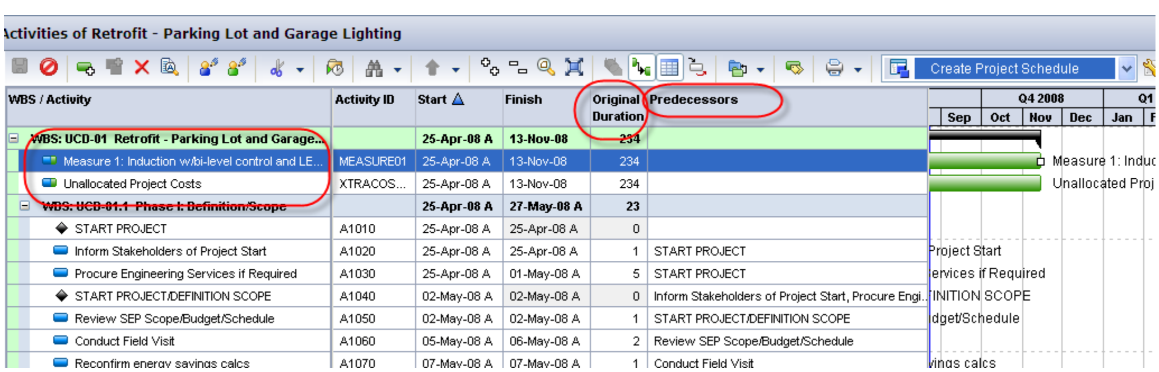
Documents- Used to track and manage project documents in a "document repository".

Develop the Project Schedule

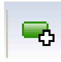
The schedule template contains the mandatory project milestones, standard activities and relationships, as well as the activity coding required for project reporting. A global Activity View "Create Project Schedule" was created to assist with this.

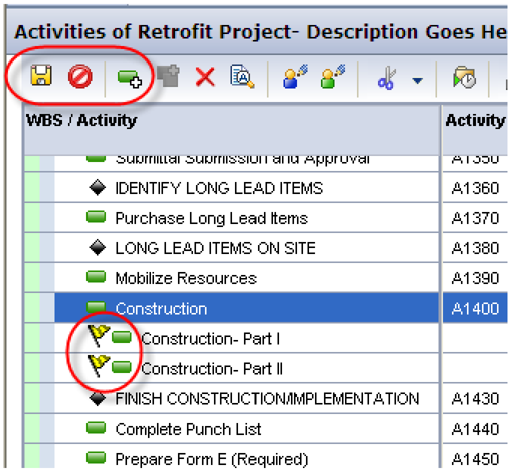
Each user can make adjustments to the project schedule including:

- Add/Delete Measures
- Add Activities
- Modify Relationships (Predecessors)
- Modify Activity Durations



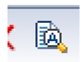
Add Activities

Click the Add Activity icon  or rt-click and select "Add Activity" or click "Insert" on the keyboard. As activities are added a yellow flag appears and the "File Save" icon turns "yellow". Click the "File save" icon to save your changes.



When an activity is added it is auto-numbered based on the default settings. Leave the Activity ID cell blank to accept the auto-number or type in the new Activity ID.

Activity information can be added in the columns or in the "Activity Details" screen. Click the "Activity Detail" icon..

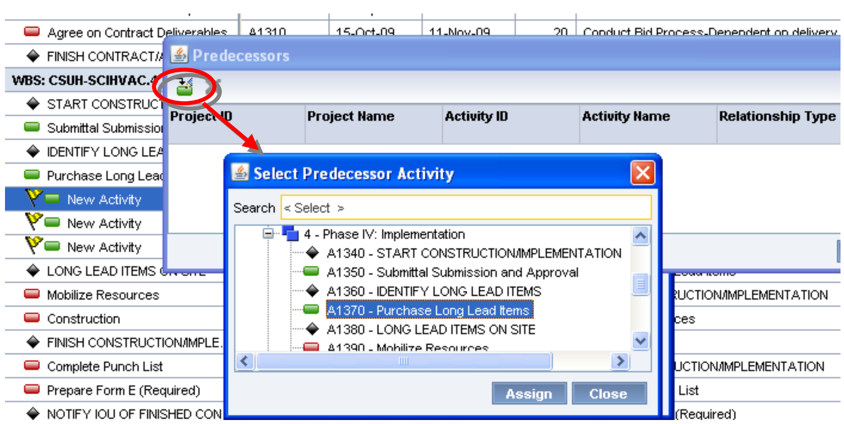


Add Relationships

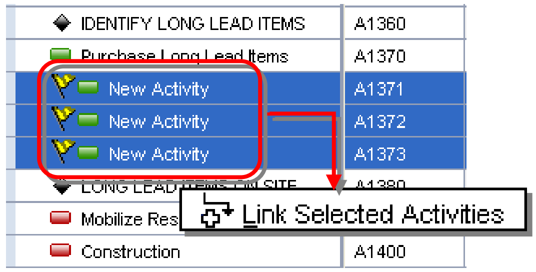
Relationships can be added in the Activity Details screen (Relationships tab), by

1. rt-click on the Activity and select "Edit Predecessor" or "Edit Successor
2. "Linking" activities listed in order
3. Add Predecessor in the Columns

Edit Predecessor or Successor Windows

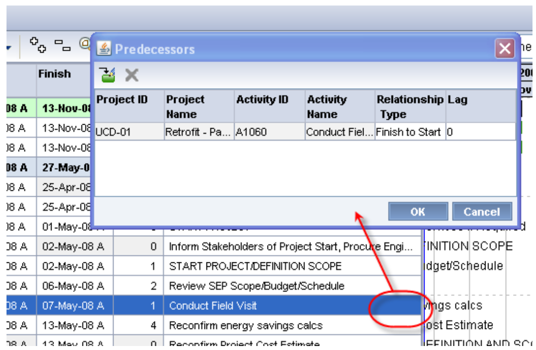


"Link" Activities



Highlight all activities to be linked and rt-click. Then chose "link selected activities". Relationships will be added so that activities occur in order shown.

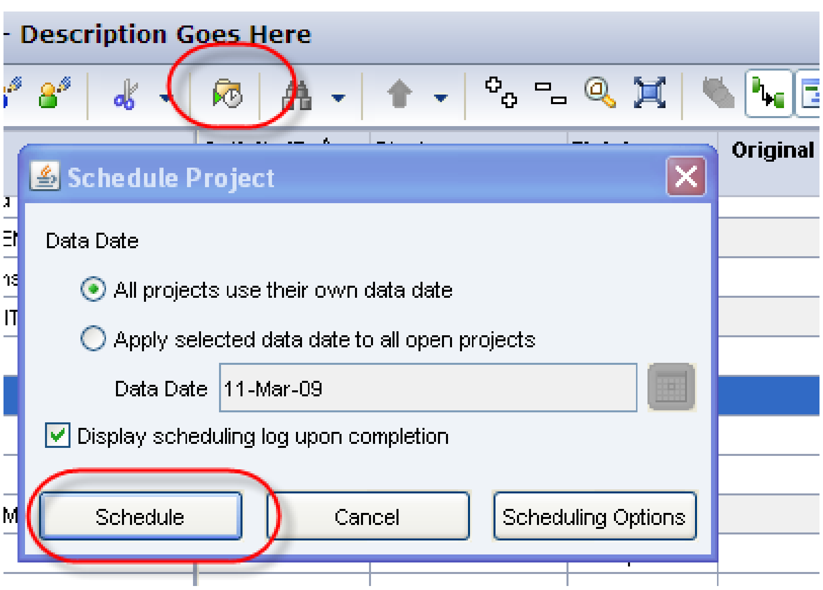
Edit Predecessor in the Columns



Click in the Predecessor column cell. The Predecessor assignment dialog box will appear. Assign the predecessor and click "OK".

Schedule the Project

After the schedule adjustments are completed, the schedule can be "calculated". Click the Schedule Icon, or "F9", or go to Tools, Schedule to setup the Scheduling Options and Calculate the Schedule.



Enter Preliminary Data

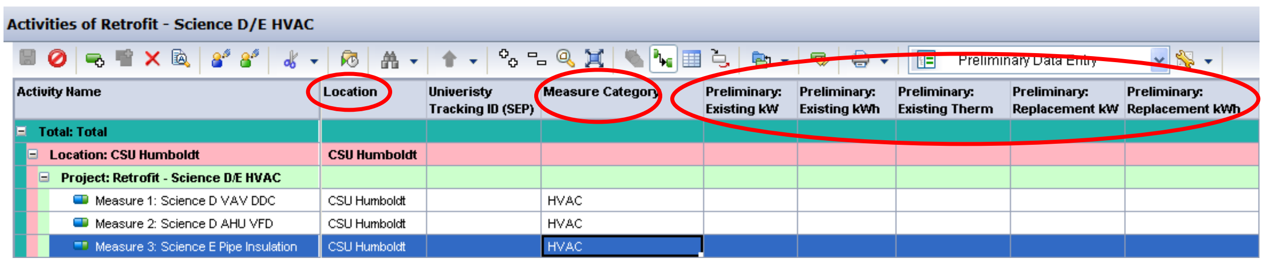
Another view has been created to allow campuses to enter preliminary savings data before submitting the application.

This view allows users to:

- Add/Delete Measures
- Assign Location and Measure Category
- Input Preliminary Savings Data

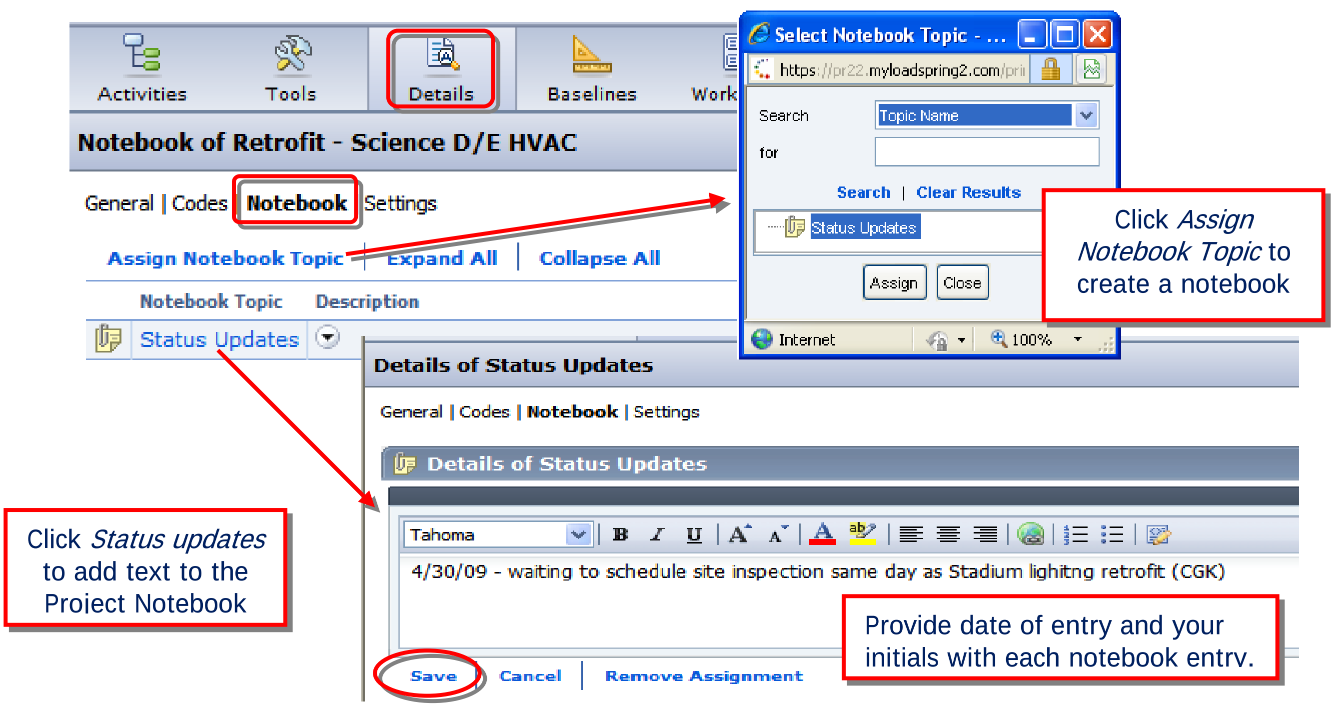
1. "Location" and "Measure Category" are assigned through activity codes which are pre-defined. Double-click in the cell to select these values.

2. Preliminary savings data is entered directly in the cells. These fields are pre-formatted as either a number field or a cost field.



Assigning Notebook Topics

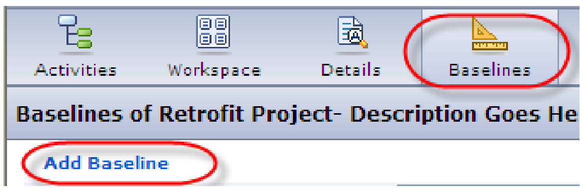
To provide additional information about project status, use the Project Notebook feature. Go the Details section and then click Notebook. To create a notebook for each project you must "assign a notebook topic". Once you have created the "Status Updates" notebook, you may add to this notebook through the project details section or in the dashboard.



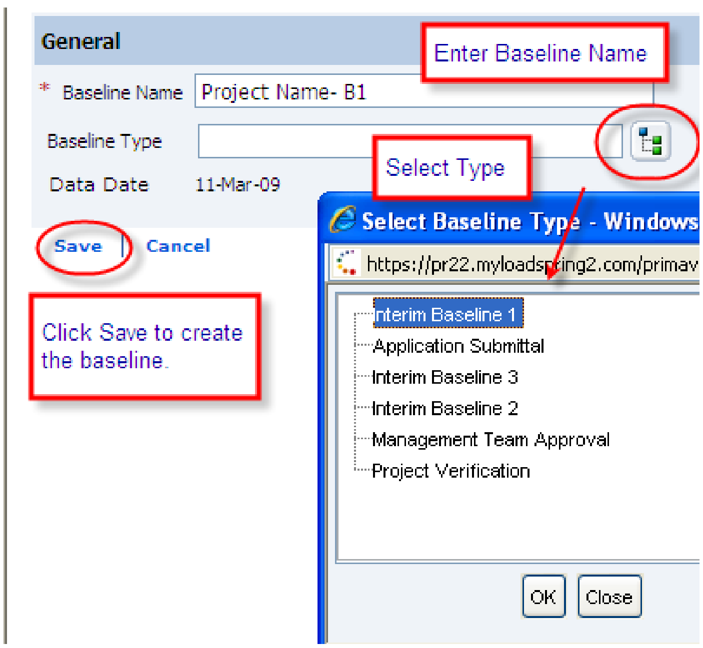
Create a Schedule Baseline

Once the baseline dates and budget have been approved, create a "baseline" of the project. P6 allows creation of an unlimited number of "baselines" or copies of the project schedule at any point in time to use for comparison purposes. "B1" will be the original baseline for the overall project schedule.

1. Select the "Baselines" tab and Click "Add" to create a new baseline.

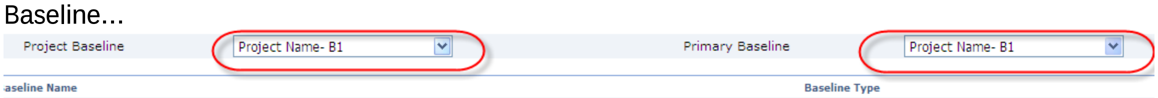


2. Name the Baseline and assign a Baseline Type. Click "Save".



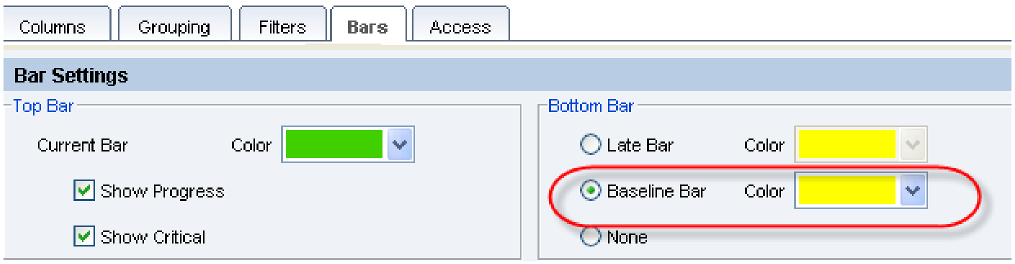
Assign a Baseline

In P6 Web, a user can "Assign" (choose for comparison) both a Project and Primary Baseline...

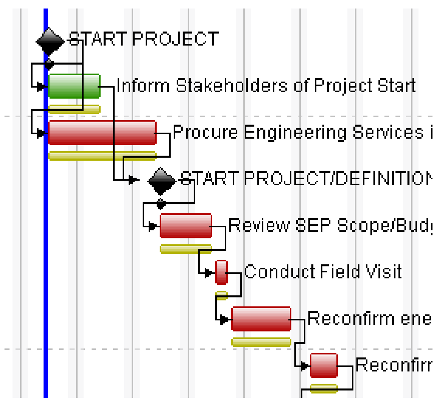


View the Baseline

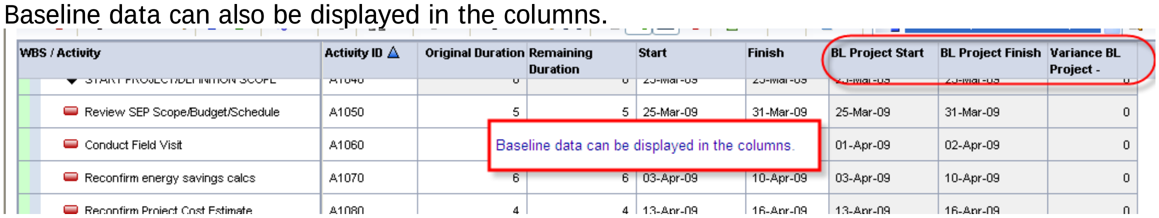
Baseline information can be viewed with either the bars or in the columns. Use “Customize View” to select the “Baseline Bar” as the Bottom Bar or choose an Activities View that already includes a baseline comparison.



The baseline bar will shown in the Gantt Chart for comparison to the current schedule.

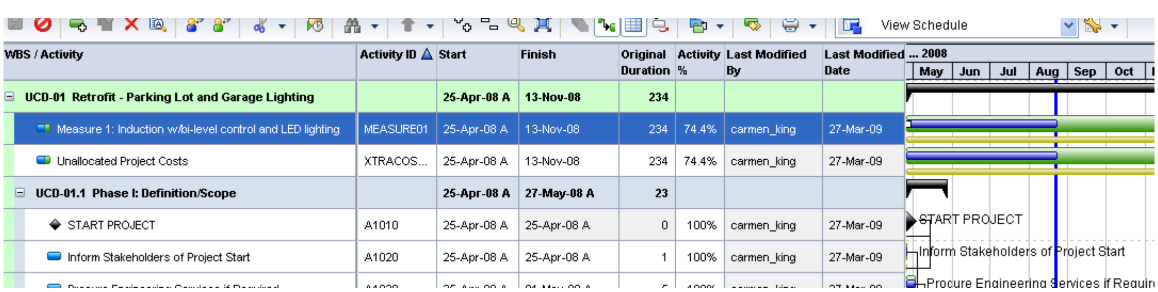


Baseline data can also be displayed in the columns.



A typical schedule view has been created as “View Schedule”. This is a standard schedule view. It displays the following information:

- Activity Start/Finish Dates
- Which user last modified the activity and when
- Gantt chart with baseline bar



Progress Reporting Steps

Reporting progress can be accomplished by several different methods. In P6 Web, the simplest method is to update progress directly in the project schedule in the Activities column using the following steps (in the order listed below):

For Completed Activities:

1. Actual start and actual finish dates

For In Progress Activities:

1. Actual start date
2. Percent complete and/or remaining duration or Expected Finish

"Progress Updates" is another activity view that has been created to assist with updating progress. A user can update the following:

- Add/Delete/Modify Activities
- Enter Actual Start/Actual Finish Dates
- Enter Expected Finish Date (only if the activity has started)
- Remaining Duration
- Activity % Complete

Progress Upd

WBS / Activity	Activity ID	Start	Finish	Actual Start	Actual Finish	Original Duration	Remaining Duration	Expected Finish	Activity %
UCD-01 Retrofit - Parking Lot and Garage Lig...		25-Apr-08 A	13-Nov-08	25-Apr-08		234	60		
Measure 1: Induction w/bi-level control and L...	MEASURE01	25-Apr-08 A	13-Nov-08	25-Apr-08		234	60		74.4%
Unallocated Project Costs	XTRACOSTS	25-Apr-08 A	13-Nov-08	25-Apr-08		234	60		74.4%
UCD-01.1 Phase I: Definition/Scope		25-Apr-08 A	27-May-08...	25-Apr-08	27-May-08	23	0		
START PROJECT	A1010	25-Apr-08 A	25-Apr-08 A	25-Apr-08	25-Apr-08	0	0		100%
Inform Stakeholders of Project Start	A1020	25-Apr-08 A	25-Apr-08 A	25-Apr-08	25-Apr-08	1	0		100%
Procure Engineering Services if Required	A1030	25-Apr-08 A	01-May-08 A	25-Apr-08	01-May-08	5	0		100%

Other Activities Views

Activity Views can be created by each user. These will be "user-specific" and not available to other users.

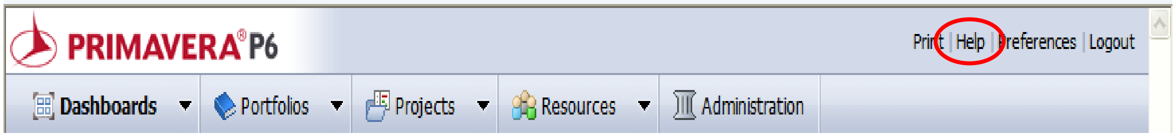
Activity Views will be created for all users when reporting needs have been identified. One additional view that has been created is the "Savings and Incentives" view for managers to view energy savings and incentives by project. This will display information based on which projects are opened and can provide the following data:

- Applied, Approved, and Verified Savings and Incentives
- Grouped by Campus
- Totals by Campus and for the Total Program

Activity Name	Applied: kW Reduction	Applied: kWh Reduction	Applied: Therm Reduction	Approved: kW Reduction	Approved: kWh Reduction	Approved: Therm Reduction	Verified: kW Reduction	Verifi Reduc
Total	82.00	1,345,344.00	0.00	82.00	1,345,344.00	0.00		
UC Davis	82.00	1,345,344.00	0.00	82.00	1,345,344.00	0.00		
Retrofit - Chem-Chem Annex HP Air Filter Up...	26.00	155,522.00	0.00	26.00	155,522.00	0.00		
High Performance Air Filter Upgrade	26.00	155,522.00	0.00	26.00	155,522.00	0.00		
Retrofit - Parking Lot and Garage Lighting	56.00	1,189,822.00	0.00	56.00	1,189,822.00	0.00		
Measure 1: Induction w/bi-level control and L...	56.00	1,189,822.00	0.00	56.00	1,189,822.00	0.00		
Unallocated Project Costs	0.00	0.00	0.00	0.00	0.00	0.00		

Help Section

For additional information on the P6 web tool, access the Help section.



When you click the help link, a window will pop-up displaying help topics on whichever section of P6 web you are currently in. For example, if you click help while you are in the dashboards section, the help window will open to help topics on dashboards. If you are in an activities view, then the help window will display information and tips on activities and activity views.