

Administration in Primavera P6 and P6 Web Access – 106A

What you will learn:

P6 Administration provides guidance on setting up enterprise data in P6 Client-Server and P6 Web, including the creation of calendars, project codes, activity codes, and resource codes. The course also covers how to set up users and processes to establish security.

Learn to:

- Create a new project calendar
- Automatically summarize data using a job service
- Create financial periods
- Define global change parameters
- Assign cost accounts to activities
- Create issue codes

Audience:

- Functional Implementer
- Business Analysts
- End Users
- Project Manager

Prerequisites:

Required Prerequisites:

- Project Management in Primavera P6 Rel 6

Course Objectives:

- Create Calendars
- Designate a secure code
- Create values for project codes and resource codes
- Define and create an Organizational Breakdown Structure hierarchy
- Create a new user with access privileges
- Run a global change
- Create financial periods

- Create a calculated user-defined field

Course Topics:

Creating Calendars

- Define worktime and nonworktime
- Designate between global, project, and resource calendars
- Create a new project calendar

Defining Project Codes

- Define project codes
- Create values for project codes
- Assign weights to project codes and project code values
- Designate a secure code
- Assign project code values

Defining Resource Codes

- Define resource code
- Create values for resource codes
- Assign resource code values in Primavera

Defining Activity Codes

- Define activity codes
- Create values for activity codes
- Designate a secure code
- Assign activity code values

User Access

- Describe the process for establishing security
- Define and create an Organizational Breakdown Structure hierarchy
- Establish security profiles for global and project data
- Create a new user with access privileges

Summarizing Project Data & Running Job Services

- View summarizer details
- Manually summarize data
- Define job service options

- Automatically summarize data using a job service

User-Defined Fields and Global Change

- Establish user-defined fields
- Define global change parameters
- Run a global change

Financial Periods

- Create financial periods
- Display financial periods as columns
- Store past period performance

Defining Cost Accounts

- View the cost accounts dictionary
- Assign cost accounts to activities
- Assign cost accounts to expenses

Web Administration

- Manage User Interface views
- Create a calculated user-defined field
- Create issue codes
- Create an issue form