Oracle | Primavera

P6 EPS, OBS, Users Demo Script

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Revision Status

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<tr>
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PRODUCT(S) Version: Primavera P6 v2

Related Documentation / Scripts

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1. INTRODUCTION / OUTLINE / VALUE PROPOSITION

This demonstration script is focused on some demo (and real) P6 environment fundamentals. Much of this content would rarely be explained in-depth to a customer as part of the sales cycle but perhaps quickly shown and / or used to configure a demo.

The script will include the following in order:

- Enterprise Project Structure (EPS)
- Organizational Breakdown Structure (OBS)
- Users
- Security Profiles
- Privileges

The features / functionality covered in this script are important to customers as they provide a default hierarchy that maps the project structure to users and security thus making it easier to assign and manage Program, Project, and WBS level security. They also provide a Program / Project structure, with costs and units rolling up automatically, giving the customer a default Integrated Master Schedule for all projects within a Program, and an easy way to cross link projects, eliminating the need to create a secondary, duplicate IMS structure.

Many of these features are a given that we must provide. Having said that, each of these features and the group as a whole provide the various levels of security and access rights that are necessary to accommodate a multitude of different users. A typical situation is a company with multiple contractors. It would be ideal if the contractors could submit subprojects (projects that are a part of a larger ‘Master’ project) and make changes, submit updates, report actuals etc. in the live project without compromising unrelated data or accessing proprietary data. The appropriate setup of the EPS, OBS, Users, Security Profiles etc. facilitates this.

2. SETUP / DATA REQUIREMENTS

This demo will utilize the thick client only as much of the functionality is currently only available in the thick client.

3. DEMONSTRATION SCRIPT

3.1. Enterprise Project Structure (EPS)

The EPS is a hierarchy used to organize projects, and to associate Organizational level security with that project structure.

NOTE: This is important to clients from a pure organizational standpoint. More importantly, project access is based upon the EPS and thus people in one side of an organization may never know (see) projects / information related to other groups within the same P6 Enterprise implementation.

The EPS consists of roots and nodes. ALL projects must reside within an EPS node. The EPS is also the base Portfolio structure, and the only one that is required and “physical”. All other portfolios are logical ones, containing pointers to the projects.
From the thick client main menu, click Enterprise > Enterprise Project Structure. You should see something similar to this screenshot. In this EPS, you can see the hierarchical structure with ENERGY being the top node and branching to O&G (Oil and Gas) and UTIL (Utilities). Projects can reside within any node and a node may contain any number of projects.

NOTE: Placement of a project in the hierarchy also determines the summary level in which it is included for reports and scorecards etc. Summary level will roll up costs and units for all projects and nodes at lower levels.

Projects can easily be relocated within the EPS at any time (given the appropriate user privileges).

With respect to demoing, it is often times a good practice to add a node by the name of your customer and copy projects to that node for purposes of the demo. This is up to personal preference.

To add a Node to the EPS, click the Add button. The dialog will assume you want to add the node to the hierarchy below the level that is currently highlighted (in the case above, ENERGY). If you need to reposition the node, use the arrows.

3.2. Organizational Breakdown Structure (OBS)

The OBS (Organizational Breakdown Structure) is a hierarchical arrangement of an organization’s management structure. The OBS is defined at a global level and works with the EPS to control user access to project information.

TIP: Please do not confuse the OBS with resources even though it can be configured to a detailed level by including employee’s names etc.

From the thick client main menu click Enterprise > OBS. You should see something similar to:

Note that in this case, the OBS hierarchy closely matches that of the EPS. This may or may not be the case for your customers. Each element in the OBS can have users associated with it. In this screen shot, David Roe is a user assigned to the UTILITIES node in the OBS. Notice that he also has an assigned Project Security Profile of Project Manager which we will discuss also within this document.

Click the Add button to add an OBS element and use the arrows to move if necessary.

We need to return to the EPS to understand now how the EPS and OBS are related in P6.
Each EPS node can have a **Responsible Manager** associated with it.

**NOTE:** The **Responsible Manager** assignment designates who is responsible for the work within an EPS node, project or WBS element. When you add a new project, by default, the Responsible Manager assignment is inherited from its parent EPS node.

This **Responsible Manager** is an element from the OBS. This is how the two hierarchies are associated with one another. In this example, the **UTIL** EPS node has **UTILITIES** as the **Responsible Manager** (an element in the OBS) which has David Roe assigned to it as a user. What this means very simply is that David Roe, along with anyone else in the list of users assigned to **UTILITIES** in the OBS has access to projects at the **UTIL** level and below with respect to the project hierarchy. You cannot assign users directly to an EPS node, only the OBS node. You still define detailed level of access through the Security options.

**NOTE:** Once the structure is in place, it makes it quick and easy to connect Program / Project teams to the projects in which they need visibility / access. Assign them once to the node, and they automatically inherit rights to the projects within it.
3.3. Users
Continuing to build upon this example, next, we will cover how Users are created.

Each individual who uses Primavera must be a registered user.

From the thick client main menu click **Admin > Users**. You should see something similar to:

To add a new user, click **Add** and complete the user information in the tabs:
- **General**: Login Name and Password (for demos typically is blank). If the person will be record time in Timesheets, they will require a Resource ID (see the Timesheet demo script).
- **Contact**: Email / Phone.

The **Global Access** tab is used to assign the appropriate global security profile to the selected user as well as specify the resources that the user will be able to access.

To see what the **Global Security Profile** of Resource Manager (assigned to David Roe in this case) is, in the main menu click **Admin > Security Profiles**. See the list.

The **Project Access** tab is used to assign the appropriate Responsible Manager (OBS) and project security profile. These assignments will determine which projects the user will be able to access within the database.

To clarify:
- If the Responsible Manager is assigned to an EPS node, the user has access to the projects and activities within the EPS node.
- If the Responsible Manager is assigned to a project, the user has access to the project and activities within a project.
Click on the **Licensing** tab which is used to identify areas of Primavera the user can access.

You must check **Project Management** for P6 in general and the **Web Access** categories as well for the P6 web client.

### 3.4. Resources

This section will describe the setup associated with making a user an actual resource in P6. This means they can be assigned to activities in a project etc. Understanding how to make this connection is critical for a web based demo.

**NOTE:** An integrated resource pool is essential to allowing customers to see, monitor, adjust, and plan for resource usage within the enterprise and not have to worry about duplication of resources and limited visibility that would occur if each Project Manager named shared resources differently.

Resources do not need to be Users to be assigned to the system. Users can be Resources.

Resource allocation limits ensure that you don’t over assign critical resources, and that you have sufficient resources to work all of your projects.

First, add the user as a Resource:

In the main menu, click **Enterprise > Resources**. Click **Add** for a new resource. A wizard will guide you through the setup. Now that the Resource exists, it needs to be associated with a User.

Return to the Users (**Admin > Users**)

Click the **Resource** field and a pop up dialog list of resources will appear. Select the appropriate Resource to assign to this User.
Now, this user will be able to log into the web client and see activities, projects etc. to which they are assigned / associated.
4. **APPENDIX A: FREQUENTLY ASKED QUESTIONS**

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