

Primavera P6 EPPM: Setting Up the Foundation for Project Management

This presentation will guide you through the essential steps involved in setting up the foundation for successful project management within Primavera P6 EPPM. We'll cover the creation of hierarchical structures, the assignment of users and roles, and the definition of resources for efficient project planning and execution.

Structuring Your Enterprise

EPS: The Enterprise Project Structure

The EPS defines the structure for grouping projects within your organization. It allows you to categorize projects based on various criteria, such as project type, risk level, or funding source. EPS nodes can be further broken down to create a multi-level hierarchy, providing a comprehensive view of your project portfolio.

WBS: Work Breakdown Structure

The WBS provides a hierarchical breakdown of the work involved in a project. It allows you to define tasks, subtasks, and activities, providing a clear scope and structure for project planning and execution. P6 EPPM automatically creates a WBS element for each project, ensuring consistent organization.

Defining Your Organization

OBS: Organizational Breakdown Structure

The OBS represents the hierarchical structure of the managers responsible for your projects. It defines the reporting lines and relationships between managers, allowing you to assign projects and track their progress effectively.

Assigning Users to OBS

Users can be assigned to OBS elements, granting them access to projects associated with that specific OBS. This provides a secure and controlled way to manage user permissions and project visibility.



Understanding Resources and Roles

1 Roles: Defining Job Titles and Skills

Roles represent the specific job titles or skills required for project execution. You can create a standardized set of roles and assign them to resources and activities.

2 Resource Proficiency

When assigning roles to resources, you can indicate their proficiency level in that role, helping you assess their suitability for specific tasks.

3 Primary Role

Identify the primary role for each resource, representing their main area of expertise and current responsibilities.

Creating Roles and Managing Hierarchy

1

Creating Roles

Create a standard set of roles within P6 EPPM that represent the different job titles and skills required for your projects.

2

Defining Role Hierarchy

Organize roles hierarchically for easier management and assignment. This allows you to group related roles together, providing a clear structure for your organization's skillset.

3

Defining Units and Prices

You can establish different price per unit rates and unit per time limits for each role, enabling accurate planning and cost management.



Assigning Roles to Resources

1

Role Assignment

Assigning roles to resources defines their skill capabilities and makes it easier to match resources to activities based on their expertise.

2

Proficiency Level

Define the proficiency level of a resource in a specific role, indicating their expertise and ability to perform the tasks associated with that role.

3

Primary Role

Select the primary role for a resource, representing their main area of focus and current responsibilities.

Assigning Roles to Activities

1

Role-Based Planning

You can assign roles to activities directly, even when you don't know the specific resources available. This allows you to plan activities based on skill requirements.

2

Resource Substitution

Later, you can replace roles with specific resources, ensuring that the right people are assigned to the tasks based on their skills and availability.

Key Takeaways: Setting the Foundation

1

Structured EPS and OBS

Establish a clear hierarchical structure for your enterprise project structure (EPS) and organizational breakdown structure (OBS) to effectively manage projects.

2

Defined Roles and Resources

Create a standardized set of roles and assign them to resources, providing a clear understanding of skills and capabilities within your organization.

3

User Permissions and Access

Manage user permissions and access to projects through OBS assignments, ensuring a secure and controlled environment.



Next Steps: Leveraging Your Foundation

1

Create Projects

Create new projects within P6 EPPM, utilizing the established EPS and OBS to ensure proper categorization and assignment.

2

Define Activities

Define the activities required for each project, leveraging the WBS structure and assigning roles based on skill requirements.

3

Schedule and Resource

Develop a detailed schedule for your projects, assigning resources to activities based on their proficiency and availability.

P6 EPPM: Empowering Project Success

By establishing a solid foundation within P6 EPPM, you can streamline your project management processes, improve efficiency, and ensure successful project delivery. Through structured hierarchies, defined resources, and clear roles, you empower your teams to collaborate seamlessly and achieve outstanding results.

