

Use this document when viewing,  
designing, sharing and  
Understanding Dashboards in P6  
EPPM Web interface R8.0 and later.

## White Paper - Understanding Dashboards in P6 EPPM R8.0+

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## References

1. All P6 Web illustrations are taken from a demonstration sample of P6 EPPM R8.2 installed on a virtual machine on my computer.
2. Non P6 related illustrations are taken from [www.freeimages.com](http://www.freeimages.com) (Automotive Section)
3. Dashboard Portlet descriptions listed in the Appendix sections are taken from the Oracle Primavera P6 EPPM Documentation Library R8.2.

## Who should read this paper?

This paper can be read and used by anyone who has ever logged onto P6 Web, whether you are an experienced P6 Planner or even if you are a novice P6 user. Read this paper from start to finish, or merely use the paper for reference when designing a dashboard, it's entirely up to each individual.

Who should read this paper should not be limited to a user role, but rather limited to the P6 infrastructure you have in your organisation. There is no point in developing your Dashboard skills if you have no underlying data to base it on. Mature data is the key, in other words, an EPS full of Named Resource Loaded schedules; Activity / Project Owners assigned; with clear and descriptive Project / Activity names; coded; well thought out EPS & OBS; Stored Financial Periods, a large P6 user base, etc. Once your organisation has these aspects in place, designing dashboards becomes easy. If none of this made any sense at all, I suggest you start with Oracle University or a certified Oracle Primavera training facility, maybe even a Primavera partner.

You can also use this paper to help build mature data, by that I mean create an empty dashboard and identify how you need to structure your project data in order to populate the dashboard with meaningful information. This approach may seem backward, but it's a place to start.

One last thing, you need P6 Web to create Dashboards. That means, you need the web services version of P6 EPPM Enterprise Primavera Portfolio Management 8.0 and later only. The Windows Client aka P6 Professional / Optional Client don't support Dashboards. In addition, earlier versions of P6 Web do support Dashboards, however I've decided to only include down to version R8.0, as they have the same look and feel. In any case, these versions R8.0 and above are recent upgrades, and more is better. As long as you have a service agreement with Oracle, why waste time with old technology?

### CHARLIE'S TIP:

As you go along, I'll be including 'Charlie's Tips', which is basically tips to you, gained from experience when implementing Primavera P6 Web Dashboards to clients.

### CHARLIE'S TIP:

In order to utilize the full functionality of P6 Dashboards, organisations who plan and manage projects in P6 with 'named' resources will gain the most from P6 Dashboards. Prepare to interpret Dashboards differently when using 'shortcuts' or 'alternatives' during implementation when resources are considered.

## Introducing Dashboards

When you think of a Dashboard, think of it like the Dashboard (heads up display) of a motor vehicle.

Whilst the Dashboard doesn't necessarily drive the vehicle, its purpose is to provide up to date real time information about vehicle's performance to the driver/s. The use of short, colourful and well thought out layouts make Dashboards not only appealing, but functional too.



Standard performance metrics like speed, total distance covered, oil temperature and other driving metrics are shown in one spot, with clear visibility. And for those fortunate with a deeper pocket might have AMB temp, GPS, and other bling bling as additional performance metrics on your vehicle. The point is that a vehicle's dashboard is a single interface for multiple drivers to view performance details, in one place, separated into boxes of detail, with visible and colourful displays, to view summary information about the car.



In fact, when you think there is a problem with the car whilst driving, the first thing one would normally check is the dashboard oil temp, before actually checking under the hood. The same principle is applied to a P6 Dashboard.



Getting back to P6, the landing page in Primavera P6 Web is the Dashboard; it's the first thing a driver sees when they log on. From the dashboard, you identify the problem, and then navigate to the various other places in P6 to fix the problem. For instance, there is a problem in the project as it is falling behind schedule, so you would look on the dashboard for the SPI, Project Float value or Finish Variance Values. When you come to the same conclusion that the project is behind schedule, based on the values displayed on the Dashboard, you will know the severity and what needs to be done. In this case, throw more resources at it, increase the budget, change the calendar; constraints or durations, or possibly change relationships in a project for more parallel works to happen with Start to Start logic links.

As you read through this document, continue to use the motor vehicle dashboard example, particularly when it comes to the Dashboard design. When you are designing a Dashboard in a car, you need to consider that other drivers might use the dashboard, you need to consider access to the dashboard, the layout, the personal preferences and so on.

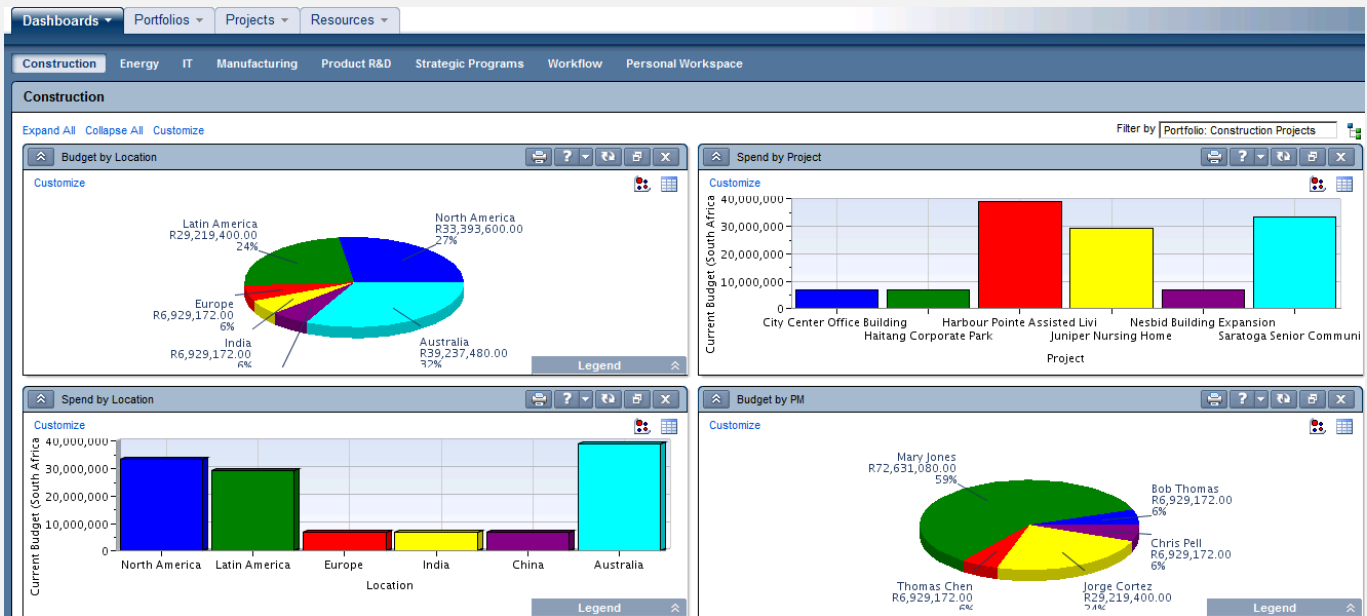
### CHARLIE'S TIP

So, if the Dashboard on P6 is comparable to that of a Vehicle Dashboard, when things go wrong, and the Dashboards start flickering red warning lights, it's time to call a mechanic, a P6 Planner or the Planning Management department, or change the way you plan to drive the project. Use Portfolio view's to imitate these red lights!

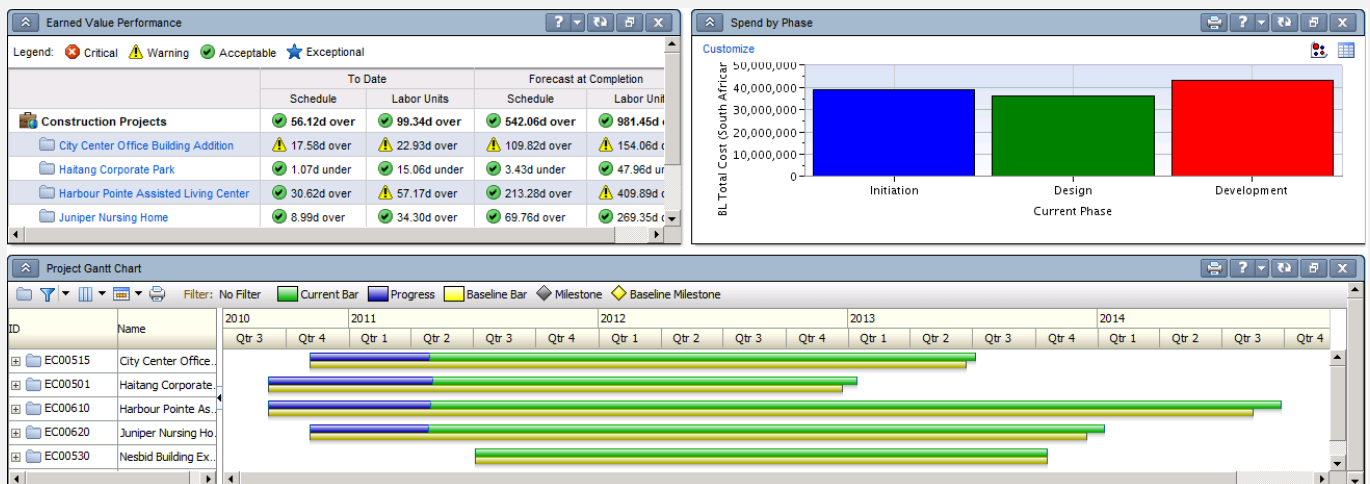
## What does a Dashboard look like?

Traditionally, P6 as a standalone desktop application was always a bit clumsy when it came to reporting performance to a monitoring group, like Managers, Stakeholders and Shareholders. It did the job of working as a tool to manage a project, but lacked the ability to provide easy, configurable and graphical appealing outputs like the many of Primavera's competitors. Naturally this annoyed the P6 community and with the release of P6 R8.0 (actually a bit earlier) came the functionality of Dashboards.

Dashboards in P6 are a selection of 'Portlets', in other words 'boxes of information' displayed on one single page, without additional tabs or sub pages. That means a P6 Dashboard is one page, and the tabs to the left or right of the current selected Dashboard is another Dashboard.



These Portlets will be described in the next section however for the most are what's known as Meta data, i.e.: data that describes data. That means the portlet is a design that will describe certain data in the database. For instance Risk portlet describes risks captured in the database, applicable to a project, programmes or portfolios. These Portlets are a collection of tabular reports, forms, graphic outputs or a combination of the 3.



Therefore, a Dashboard looks like a page of boxes which contain **SUMMARIZED** data applicable to the person viewing that particular Dashboard. The boxes are all the same height, and the length is limited to half the page or across the entire page. Suffice to say, there is no space for detailed activity level information.

#### CHARLIE'S TIP:

You will noticed I made the word **SUMMARIZED** in bold and capitals. If you don't know what this means, I suggest you take the time to read up on it now, but basically it's a process you run on projects to populate summary tables in the database.

Lastly, unlike a flat or stacked printed paper report, a Dashboard does have some functional interaction, drill down / slice n dice functionality. Therefore a user can in some instances for example, see the SPI of a project, then drill down to see the SPI at the different WBS levels.

#### ANOTHER CHARLIE'S TIP:

For an unlimited number of 'Interactive Dashboards', you may want to consider P6 Analytics in your organisation, which is a component of Oracle Business Intelligence suite of products. Get onto Oracle's website for further details.

## What kinds of Dashboards are in P6?

P6 Dashboards are a collection of Portlets, therefore there is no standard dashboards available, and it's up to the organization and the collection of it's users to decide what dashboards to create and maintain. There are however 3 different types or categories of so called 'Dashboards':

### 1. P6 Dashboard

A P6 Dashboard is a page on the P6 Web Navigation Bar to summarize and report data from multiple Projects or Portfolios (groupings of projects). It allows the user to see the same information about one project in comparison to another. Other than the 'My Activities' Portlet, most Portlets on the P6 Dashboard provide summary data to a portfolio; project or WBS level only. The Dashboard is not designed to manage projects, simply to provide summary information about the projects, allowing the user to make a decision, based on the results they see.

### 2. Workspace

A Project Workspace is a page on the Projects navigation bar to show detailed information limited to a single project. If you had a Dashboard open on one system, and a Workspace opened on another, only experienced Dashboard creators could tell the difference, as they are almost identical. It's their location and purposes that differentiate the two. A P6 Dashboard allows you to view multiple projects, A Workspace only looks at the project that you have open. There are no 'personalized' Portlets on the workspace page, like 'My Risks' or 'My Issues' because the information on a Workspace is particular to one entire project only.

### 3. Workgroup

A workgroup is seen as a 'Sub Project Workspace', which is a page 'under' (if you like) the workspace designed for large projects with a large P6 user group. A workgroup caters for a project that want to subdivide their 'workspace' so that that group can focus on information applicable to them rather than what the whole project wants to see.

For example, a task team is sent to site to improve performance and speed up project delivery by looking at ways to shorten x activities. This team can be created as a workgroup who look mainly at 'x' critical activities, therefore they want to see performance Portlets and the "Critical Activities Behind Schedule" portlet. Whereas the entire project will still want to see a whole lot more Portlets including all Risks, all Issues, all Calendars, all Resources, all Activities etc.

Workgroups provide a way for a team to focus on specific project activity, issue, and document information visible inside these three Portlets found on the Workgroup Workspace page:

- a. Activities Portlet of the Workgroup Workspace Page
- b. Issues Portlet of the Workgroup Workspace Page
- c. Documents Portlet of the Workgroup Workspace Page

Because this can complicate what is being described in this document, we will assume that there are only 2 types of Dashboards available in P6, the P6 Dashboard and the Project Workspace.



**CHARLIE'S TIP:**

*Just because Workgroups are not discussed in detail in this document, doesn't mean they are not useful. In fact, in my opinion, a workgroup is the best method to split up responsibility in a project. I do however believe that you shouldn't consider working with Workgroups as a general rule unless you have at least +10 P6 users actively working on your P6 project as a project team. Less than 20 and I feel you may be creating unnecessary work. For instance, the activities, issues and documents related to the mechanical group may be different to the activities, issues and documents related to the civil group.*

## What Portlets are available in P6?

To start, there are 17 standard Portlets available in P6 Dashboards that require little or no configuration. Simply check the box of the Portlet you want to see in the Dashboard. Some require a little work, like 'My Risks' for example, you need to decide on the term 'my'. Is it to say the Portlet must show all the risks that the particular user who is viewing the dashboard has access to, or is assigned the Risk owner, or both etc.

When a portlet box is checked on the Dashboard Customise page, and you press Save, it will show on the Dashboard, that's it, plain and simple.

In addition, there are 9 standard O-PCM Portlets to choose from. O-PCM is Oracle Primavera Contract Management, a separately packaged Oracle Primavera product for managing contracts. Once EPPM and PCM are integrated, these portlets should start to become useful.

Following that, there is an unlimited number of Customizable Portfolio Views, which allows the designer to create Histograms; Stacked Histograms, Bubble Charts, Pie Charts and Scorecards based on standard P6 **PROJECT** fields, like Float, Owner, Percentages, and Durations etc.

Lastly, there are 'Custom Portlets' available, which as the title depicts, allows user to use customized boxes of information like websites, charts etc. For instance, you can create a Custom Portlet to allow the users to access their email from that portlet to keep them on the same page, or Google.com, or the company Website etc. It's not just a static page, and can be used whilst logged onto P6.

**CHARLIE'S TIP:**

*It's important to consider that P6 cannot administrate the security on Custom Portlets, and security protocols will be based on the address of origin. It's not only an organisation's best interest to protect its data, but also their responsibility. Be careful not sharing data in a custom portlet to users who are not privileged to consume it. To assist slightly, a P6 System Administrator can impose a password on custom portlets, should it be needed, otherwise, you are on your own.*

## Creating a P6 Dashboard in 6 easy steps

This section will explain in detail with illustrations on how to create a Dashboard. Before we get there, here are 10 points or requirements as a checklist to consider:

Requirement	Check?
1. Is Oracle Primavera P6 EPPM Web 8.0 or later installed?	
2. Do I have the right Java version installed on my machine?	
3. Do I have Internet Explorer 8.0 / Firefox 9.0 / Google Chrome 12.0 or later?	
4. Do I have a P6 Username and Password?	
5. Do you have the 'Project' and 'Dashboard' modules assigned to your user name?	
6. Have you been assigned a User Interface View that has default Dashboards assigned by the Administrator? Or, has anyone shared a Dashboard with you?	
7. Does your organisation have any project data in the database?	
8. Are you able to see any data when you click on the Project's bar in the Workspace? i.e.: Have you been assigned a Project Security Profile to an OBS level that has Projects assigned to it?	
9. Has your Administrator assigned you the correct 'Global Security Profile' from the library, allowing you to create Dashboards?	
10. If you are an Administrator, do you have a library of security profiles and an OBS structure that has been related to projects on the EPS?  If you are an Administrator, and you don't have a library, good luck. I feel for you, silently.	

Once you check boxes 1 to 9, you can begin designing your own Dashboard.

## Step 1: Important Considerations

Before you decide to create a Dashboard, you need to ask yourself the following 3 very important and obvious questions:

### 1. Who will be accessing, reading and using this Dashboard, what access in P6 do they have?

It would be completely pointless to create a Dashboard for “Risk Department” for instance, and only have Schedule and Cost Portlets in your design. Use your creativity to meet your audience. At the same token it would also be pointless to create a Dashboard with Cost Portlets for people who don't have access to Cost / Financial data, or Projects without Cost Data.

### 2. What filter do I want to impose,

Will this Dashboard be a Portfolio of projects, a single project (rather use the Project Workspace in that case), or based on a criterion such as all Projects Status = Active (Filtered), or on a list of projects that I have assigned a particular Project Code.

The true functionality of the P6 OBS (Organizational Breakdown Security) feature is boasted here. You may include a Dashboard filter to filter out and report on only 5 projects. However a user with OBS access to only 4 out of the 5 projects will only ever see data based on those 4 projects, and excludes the 5<sup>th</sup>.

+

On the other hand, a user with access to 50 projects will get confused with data from all 50 projects, so use a logical filter, i.e. a filter from the “New Build” Portfolio, or only active projects owned by Program Manager X. This allows that user to compare apples with apples, rather than apples with 50 apples, oranges and grapes.

### 3. What access to impose?

There are 3 different access levels of a P6 Dashboard. Unlike a Project Workspace (which allows anyone with OBS access to a particular project to see the workspace), a P6 Dashboard can be limited to:

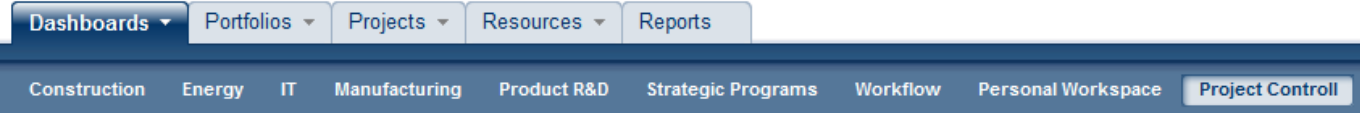
1. A single user (You).
2. Multiple users like your work colleagues (and You).
3. Global, which everyone with P6 Access to Dashboards can use.

Note that the ‘creator’ of the dashboard is the only one allowed to modify / delete a dashboard, or a P6 Administrator.

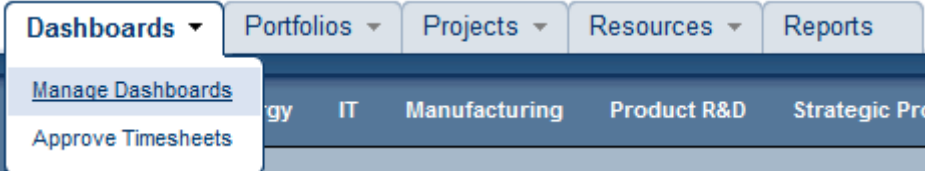
So, ask yourself – Who is my audience; What filter to use; What access level to impose?

## Step 2: Create the empty Dashboard


1. Logon to P6 and look at the available Dashboards so as not to duplicate a dashboard that already exists.



2. Click on the Dashboard drop down button, select the 'Manage Dashboard' option.

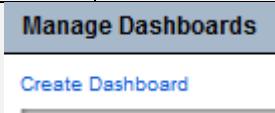


3.

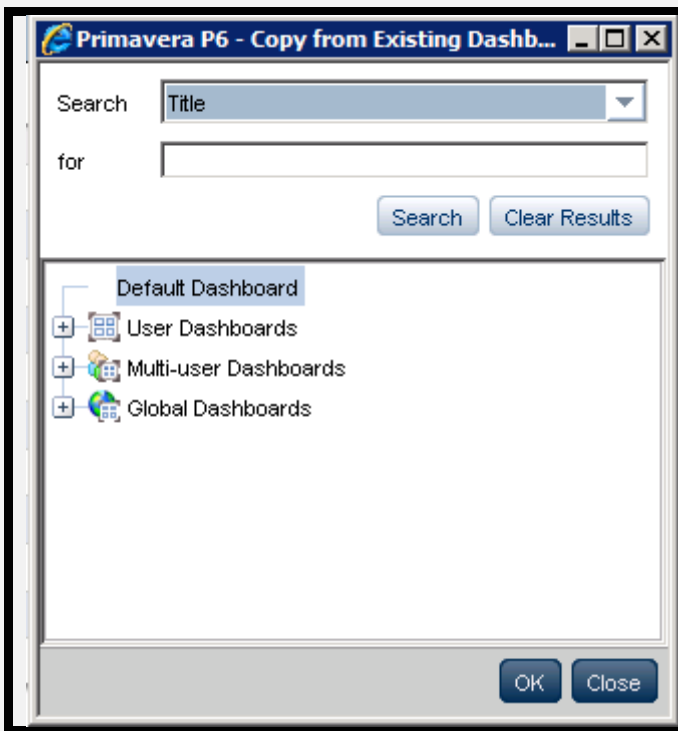


The page will load with the **'Displayed Dashboards'** and the **'Available Dashboards'** grouping. The Displayed Dashboards are the Dashboards you saw across the top of the page when you logged on. The Available Dashboards are the dashboards that are available to you as a user depending on the access of all the dashboards in P6. You will see all **Global Dashboards**; you will see **Multiple Dashboards** which have you included in the access list, or **User Dashboards** for dashboards you created for yourself in the past.

4. Now click on the **"Create Dashboard"** button.



5. A new window will popup allowing you to create a new



dashboard from scratch or use a copy from another existing dashboard with all their selected and included Portlets. Click on **'Default Dashboard'** to create from scratch, and press OK.

### Step 3: Decide on the content of the Dashboard

1.	The first step is to decide on General items, and fill in the details. Decide on a Dashboard name, fill in the form space for 'Dashboard Title'. Type in <b>"Primavera Status"</b>
----	--

**new dashboard**

Content | Layout | Access

▼ General

Dashboard Title

Dashboard Filter

Maximum number of rows displayed in dashboard portlets

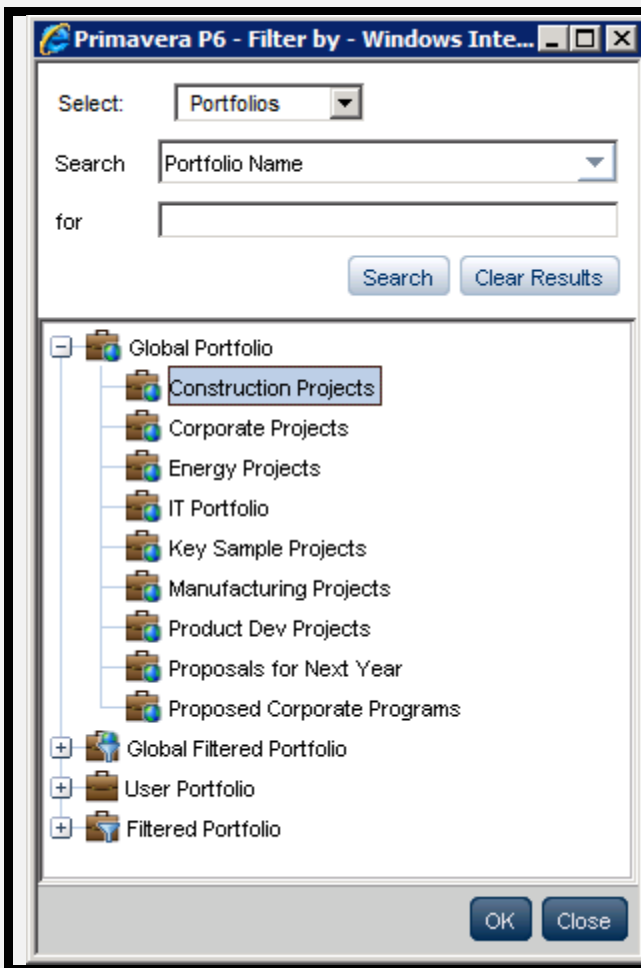
2.	Decide on the limit of rows (no. of rows in a Portlet you want to limit to, i.e.: the rows of information). Excessive amount of rows will slow down the logon time when you access P6 or this Dashboard, as the Dashboard needs to fetch all the data and report in the Portlets. Suggestion is to limit to <b>10</b> .
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**CHARLIE'S TIP:**

The actual number of portlets are governed by a P6 System Administrator. This is usually by default limited to 12 on a normal install, more than this you can impact on system performance.

Increase this number only after considering all possible alternatives, such as combining results with a portfolio view rather than individual portlets for project information, or splitting the dashboard into 2.

3.	Decide on the Filter you want to impose, either a Project, a
----	--



Portfolio or a Project Code. Use Portfolio **“Construction Projects”**. Click on Ok.

**CHARLIE’S TIP:**

If you don’t see any portfolios, you either don’t have access to portfolios, or none has been created. At this point you need to speak to your P6 Administrator, and perhaps maybe your Program / Portfolio Manager!

4. Your General details should now look something like this:

▼ General

Dashboard Title	<input type="text" value="Primavera Status"/>
Dashboard Filter	<input type="text" value="Construction Projects"/>
Maximum number of rows displayed in dashboard portlets	<input type="text" value="10"/>

5. Decide now if you would like to include any Portfolio Views. For this exercise, we will ignore these as they require some configuration.

▼ Portfolio Views

Add

6. The next step is to decide what **Performance** related standard Portlets do you want to show. To know what each portlet shows, please refer to the appendix. To add a portlet, simply tick the box next to the portlet name. Click on 'Index Performance' and 'Project Gantt Chart'.

▼ Project Performance

<input type="checkbox"/>	▶ Schedule Performance	
<input type="checkbox"/>	▶ Earned Value Performance	
<input checked="" type="checkbox"/>	▶ Index Performance	
<input type="checkbox"/>	Project Statistics	<a href="#">Customize</a>
<input type="checkbox"/>	Project Health	
<input type="checkbox"/>	Project Notebooks	
<input checked="" type="checkbox"/>	Project Gantt Chart	

7. Notice that the 'Index Performance' Portlet has an arrow. Click it to drop down a list of options.

<input checked="" type="checkbox"/>	▼ Index Performance	
<input checked="" type="checkbox"/>	Schedule Performance Index	
<input checked="" type="checkbox"/>	Cost Performance Index	
<input checked="" type="checkbox"/>	To Complete Performance Index	

As mentioned there are certain standard Portlets which require some configuration. In this example you have the option to choose Schedule, Cost and / or To Complete Performance Indexes. Leave them all ticked.

8. Next is to decide whether you would like to include any on-going document reviews to be displayed. Let's ignore that one for now.

▼ Workflow

<input type="checkbox"/>	▶ Document Reviews
--------------------------	--------------------

**CHARLIE'S TIP:**  
This portlet is only available

9. Now decide on what Personalized Portlets you want to include. For details on what each portlet reports on, please see appendix. Remember that the portlet is going to limit the information based on

1. The access of the user signed in.
2. The limitation you set by the dashboard filter imposed.
3. Any further custom limitation that you set on the Personal Information Portlets where available.

<p>▼ Personal Information</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> ▶ My Projects</li> <li><input type="checkbox"/> My Workgroups</li> <li><input type="checkbox"/> ▶ My Activities</li> <li><input type="checkbox"/> My Risks <span style="float: right; color: blue;">Customize</span></li> <li><input type="checkbox"/> My Issues <span style="float: right; color: blue;">Customize</span></li> <li><input type="checkbox"/> ▶ Communication Center</li> <li><input type="checkbox"/> My Documents</li> <li><input type="checkbox"/> ▶ My Calendar</li> </ul>	
---	--

10.	Click on 'My Risks' and 'My Calendar'		
<table border="1"> <tr> <td colspan="2"> <p>▼ Personal Information</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> ▶ My Projects</li> <li><input type="checkbox"/> My Workgroups</li> <li><input type="checkbox"/> ▶ My Activities</li> <li><input checked="" type="checkbox"/> My Risks <span style="float: right; color: blue;">Customize</span></li> <li><input type="checkbox"/> My Issues <span style="float: right; color: blue;">Customize</span></li> <li><input type="checkbox"/> ▶ Communication Center</li> <li><input type="checkbox"/> My Documents</li> <li><input checked="" type="checkbox"/> ▶ My Calendar</li> </ul> </td> </tr> </table>		<p>▼ Personal Information</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> ▶ My Projects</li> <li><input type="checkbox"/> My Workgroups</li> <li><input type="checkbox"/> ▶ My Activities</li> <li><input checked="" type="checkbox"/> My Risks <span style="float: right; color: blue;">Customize</span></li> <li><input type="checkbox"/> My Issues <span style="float: right; color: blue;">Customize</span></li> <li><input type="checkbox"/> ▶ Communication Center</li> <li><input type="checkbox"/> My Documents</li> <li><input checked="" type="checkbox"/> ▶ My Calendar</li> </ul>	
<p>▼ Personal Information</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> ▶ My Projects</li> <li><input type="checkbox"/> My Workgroups</li> <li><input type="checkbox"/> ▶ My Activities</li> <li><input checked="" type="checkbox"/> My Risks <span style="float: right; color: blue;">Customize</span></li> <li><input type="checkbox"/> My Issues <span style="float: right; color: blue;">Customize</span></li> <li><input type="checkbox"/> ▶ Communication Center</li> <li><input type="checkbox"/> My Documents</li> <li><input checked="" type="checkbox"/> ▶ My Calendar</li> </ul>			

11.	<p>Again, as before, press the arrow next to 'My Calendar'</p> <p>Users who are assigned to project activities as a resource or as the activity owner can now see all 'their' activities from the projects in the filter for a particular week. Leave 'Show Activities' ticked.</p>	
<table border="1"> <tr> <td style="width: 15%; vertical-align: top;"> <input checked="" type="checkbox"/> ▼ My Calendar  <input checked="" type="checkbox"/> Show activities         </td> </tr> </table>		<input checked="" type="checkbox"/> ▼ My Calendar <input checked="" type="checkbox"/> Show activities
<input checked="" type="checkbox"/> ▼ My Calendar <input checked="" type="checkbox"/> Show activities		

12.	As mentioned earlier, you can add Custom Portlets for web pages like emails, websites etc.		
<table border="1"> <tr> <td colspan="2"> <p>▼ Custom Portlets <span style="float: right; color: blue;">Add</span></p> <p><i>No custom portlets exist. Click Add to create a new custom portlet.</i></p> </td> </tr> </table>		<p>▼ Custom Portlets <span style="float: right; color: blue;">Add</span></p> <p><i>No custom portlets exist. Click Add to create a new custom portlet.</i></p>	
<p>▼ Custom Portlets <span style="float: right; color: blue;">Add</span></p> <p><i>No custom portlets exist. Click Add to create a new custom portlet.</i></p>			

13.	<p>To add a Custom Portlet:</p> <ol style="list-style-type: none"> <li>1. Click the Add Button</li> <li>2. Give it a title, type in "Gmail"</li> <li>3. Type in the web URL, type <a href="http://www.gmail.com">www.gmail.com</a></li> <li>4. Check the box for 'Custom Portlet 1 – Gmail'</li> </ol>				
<table border="1"> <tr> <td colspan="2"> <p>▼ Custom Portlets <span style="float: right; color: blue;">Add</span></p> </td> </tr> <tr> <td style="width: 15%; vertical-align: top;"> <input checked="" type="checkbox"/> ▼ Custom Portlet 1 - Gmail <span style="float: right; color: blue;">Delete</span> </td> <td> <p>Title <input type="text" value="Gmail"/></p> <p>URL <input type="text" value="www.gmail.com"/></p> </td> </tr> </table>		<p>▼ Custom Portlets <span style="float: right; color: blue;">Add</span></p>		<input checked="" type="checkbox"/> ▼ Custom Portlet 1 - Gmail <span style="float: right; color: blue;">Delete</span>	<p>Title <input type="text" value="Gmail"/></p> <p>URL <input type="text" value="www.gmail.com"/></p>
<p>▼ Custom Portlets <span style="float: right; color: blue;">Add</span></p>					
<input checked="" type="checkbox"/> ▼ Custom Portlet 1 - Gmail <span style="float: right; color: blue;">Delete</span>	<p>Title <input type="text" value="Gmail"/></p> <p>URL <input type="text" value="www.gmail.com"/></p>				

14.	<p>If you have any of the selected projects in the filters which are connected to PCM, you can show a Portlet which will show the Cost Worksheets of that project. Ignore it for now in this example</p>		
<table border="1"> <tr> <td colspan="2"> <p>▼ Contract Management</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> ▶ Cost Worksheet</li> </ul> </td> </tr> </table>		<p>▼ Contract Management</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> ▶ Cost Worksheet</li> </ul>	
<p>▼ Contract Management</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> ▶ Cost Worksheet</li> </ul>			

**ALWAYS REMEMBER TO SAVE EVERY STEP OF THE WAY.**  
 Press the save button to commit your selections to the server.





#### Step 4: Review your selections

Now that you have included Portlets on the newly created dashboard, it's time to see what has been created.

1. Press 'Save and Close', bottom of the page.

2. Notice that your newly created dashboard is in the 'Displayed Dashboards' grouping.

Title	Filter	Available To	Created By	Date Created		
Construction	Portfolio: Construction Projects	Global	admin	25-Jan-10 10:54 AM	↓ ↑	Delete
Energy	Portfolio: Energy Projects	Global	admin	27-Jan-10 03:05 PM	↓ ↑	Delete
IT	Portfolio: IT Portfolio	Global	admin	25-Jan-10 10:53 AM	↓ ↑	Delete
Manufacturing	Portfolio: Manufacturing Projects	Global	admin	27-Jan-10 03:06 PM	↓ ↑	Delete
Product R&D	Portfolio: Product Dev Projects	Global	admin	25-Jan-10 10:53 AM	↓ ↑	Delete
Strategic Programs	Portfolio: Key Projects over \$500K	Global	admin	17-Aug-10 04:46 PM	↓ ↑	Delete
Workflow	Portfolio: Corporate Projects	Global	admin	19-Aug-10 09:58 PM	↓ ↑	Delete
Personal Workspace		User	Charles Wright	28-May-12 08:46 AM	↓ ↑	Delete
Project Control	Portfolio: Construction Projects	Global	LaasF	28-May-12 09:41 AM	↓ ↑	Delete
Primavera Status	Portfolio: Construction Projects	User	Charles Wright	28-May-12 01:00 PM	↓ ↑	Delete

3. Press the Dashboards button on the Navigation Bar to review the dashboard.

4. Now click on your dashboard, 'Primavera Status'

5. Ignoring the data you see below (as you may have alternate Project Access / Project Data to me), you should see the boxes of information as below. Notice that each box is taking up half the page, and in no particular order.

**Project Gantt Chart**

ID	Name	2010	2011	2012					
		Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2
EC00515	City Center Office.								
EC00501	Haitang Corporate.								
EC00610	Harbour Pointe As...								
EC00620	Juniper Nursing Ho...								
EC00530	Nesbid Building Ex...								
EC00630	Saratoga Senior C...								

**Index Performance**

	Schedule Performance Index	Cost Performance Index	To Complete Perfo
Construction Projects	0.98	0.96	
City Center Office Building Addition	0.93	0.91	
Haitang Corporate Park	1.00	1.04	
Harbour Pointe Assisted Living Center	0.97	0.95	
Juniper Nursing Home	0.99	0.96	
Nesbid Building Expansion	No Progress	No Progress	No Progress
Saratoga Senior Community	No Progress	No Progress	No Progress

**My Risks**

Name	ID
Harbour Pointe Assisted Living Center	


**My Calendar**

JULY 2010						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

### Step 5: Change the Layout

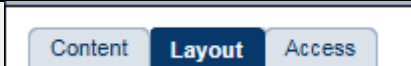
You may not like the current layout and the next example will describe how to change the Layout.

1. Press the **'Customise'** button at the top of the page



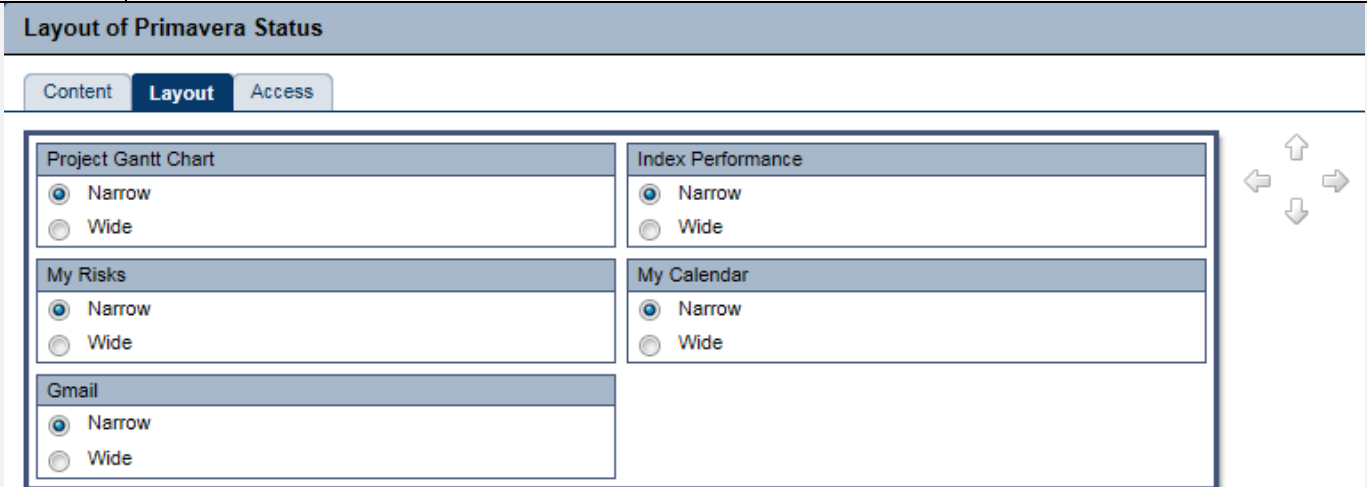
The screenshot shows the top of the Primavera Status page. A blue button labeled "Customise" is highlighted. Below it are links for "Expand All", "Collapse All", and "Customize".

2. Now press the **'Layout'** button at the top of the page




The screenshot shows the top of the Primavera Status page. A blue button labeled "Layout" is highlighted. Other buttons "Content" and "Access" are visible.

3. Remember that the Portlets were only taking up half the page. There were 2 Portlets per row, and 3 Portlets down. Now you can visualize that on this layout page.



The screenshot shows the "Layout of Primavera Status" page. It displays a grid of portlets: "Project Gantt Chart", "Index Performance", "My Risks", "My Calendar", and "Gmail". Each portlet has "Narrow" and "Wide" options. The "Layout" button is highlighted. To the right of the portlets are four arrow buttons for moving them.

4. To spread a portlet across the page, click the **'Wide'** button on any of the Portlets. Click the wide button on **'Index Performance'**.



The screenshot shows the "Index Performance" portlet. The "Wide" radio button is selected, and the portlet is expanded to fill the width of the page.

5. To move the Portlets around, click on any portlet and press the preferred arrow direction. Click on the **'My Calendar'** portlet and press the Left arrow button. Alternatively you could click and hold **'My Calendar'** and drag it to the left.

Content **Layout** Access

Index Performance

Narrow

Wide

My Calendar

Narrow

Wide

Project Gantt Chart

Narrow

Wide

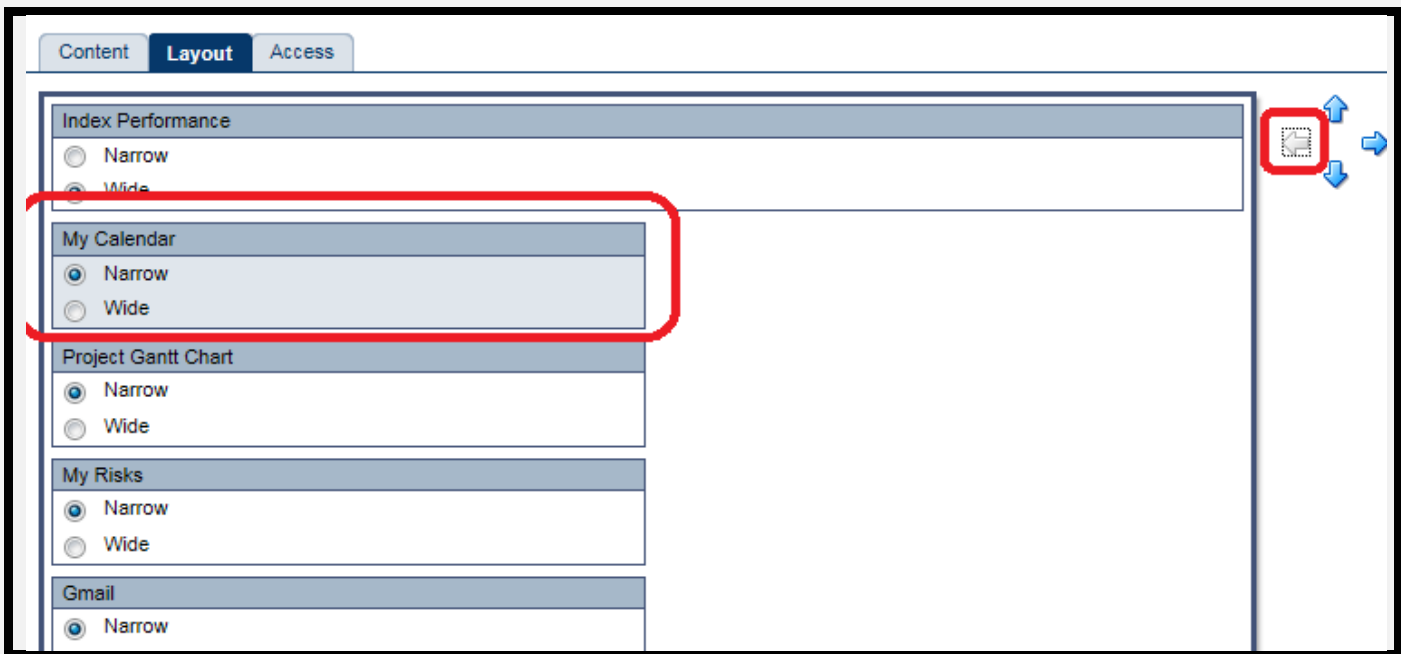
My Risks

Narrow

Wide

Gmail

Narrow



6. Press Save when done.

Save

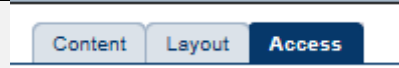
Save and Close

Cancel

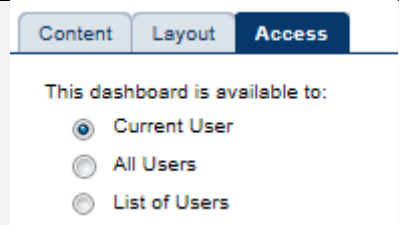
### Step 5: Decide on Access to this Dashboard

Now that you have changed the layout to suit, you need to decide on the Access privileges of this Dashboards. Note that this action might be different for users who don't have full access to Global Dashboards, or who don't have the right access in the 'Tools and Views' menu of Global Security Profiles.

1.	Press the "Access" tab on the top of the page.
----	--



2.	You now need to decide on the access you want to grant.
----	---

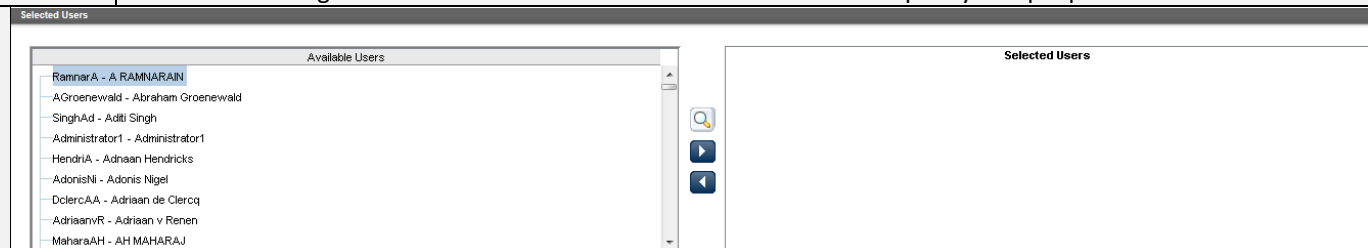


Current User	– this means only you can access the Dashboard
All Users	– this means it will become a Global Dashboard that everyone in the organisation with P6 access can see, however only you or an Administrator can edit or delete it.
List of Users	– this means that it will be a Multiple User Dashboard, of which you will have to select the users from a list. Again, only you can Edit or Delete items in the dashboard or the Dashboard itself

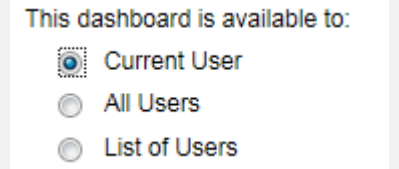
3.	Click on the "List of Users" button.
----	--------------------------------------



4.	Now use the 'Available Users' box to find your friends, and move them into the 'Selected Users' box by clicking on the user and using the arrows. You can also use the Search function to quickly find people.
----	--

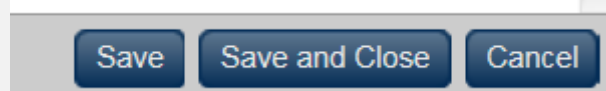


5.	Leave the availability of the Dashboard to 'Current User', click Current User.
----	--



### Step 6: All done

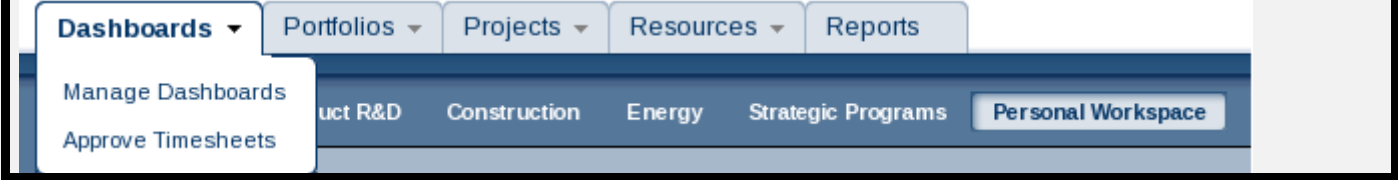
1.	Press the save and close button.
----	----------------------------------



[You have now successfully created your own Dashboard, congratulations...](#)

# Managing your Dashboards

1. Press the drop down arrow next to Dashboards, and click on 'Manage Dashboards'



2. Use this page to view all dashboards available in your user interface view and those that are currently displayed on the Dashboards page.

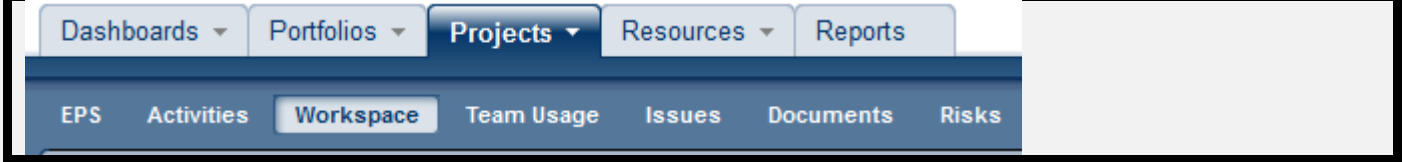
Manage Dashboards							
Create Dashboard							
1	2	3	4	5	Search		
Title	Filter	Available To	Created By	Date Created			
▼ Displayed Dashboards (7)							
<input checked="" type="checkbox"/> Corporate	Portfolio: Corporate Projects	User	admin	25-Jan-10 10:13 AM			Delete
<input checked="" type="checkbox"/> IT	Portfolio: IT Portfolio	Global	admin	25-Jan-10 10:53 AM			Delete
<input checked="" type="checkbox"/> Product R&D	Portfolio: Product Dev Projects	Global	admin	25-Jan-10 10:53 AM			Delete
<input checked="" type="checkbox"/> Construction	Portfolio: Construction Projects	Global	admin	25-Jan-10 10:54 AM			Delete
<input checked="" type="checkbox"/> Energy	Portfolio: Energy Projects	Global	admin	27-Jan-10 03:05 PM			Delete
<input checked="" type="checkbox"/> Strategic Programs	Portfolio: Key Projects over \$500K	Global	admin	17-Aug-10 04:46 PM			Delete
<input checked="" type="checkbox"/> Personal Workspace	Project: Haitang Corporate Park	User	admin	27-Oct-11 11:44 AM			Delete
▼ Available Dashboards (2)							
<input type="checkbox"/> Workflow	Portfolio: Corporate Projects	Global	admin	19-Aug-10 09:58 PM			Delete
<input type="checkbox"/> Manufacturing	Portfolio: Manufacturing Projects	Global	admin	27-Jan-10 03:06 PM			Delete

The first column of the Table is the titles of the different dashboards broken into 2 groups, the Dashboards that are displayed and the ones that are available. This page displays the global and multi-user dashboards available to you as defined in your view settings, along with your private, user dashboards. If you have the appropriate rights, you can modify the list of available dashboards that display on this page.

	<p>The next column displays the filter set on the Dashboard. Administrators who create Global Dashboards can have the filter they have chosen to be set in stone, i.e.: users accessing the global dashboard may not change the filter. This is done in the General items when creating a dashboard.</p>
	<p>The next 3 columns are</p> <ol style="list-style-type: none"> <li>1) Available To – Available To lets the user know who else can see and use this Dashboard, and will show as either User; Multiple User and Global.</li> <li>2) Created By – Created By is important because only that user who created the Dashboard can modify or delete the Dashboard.</li> <li>3) Date Created - Date Created is important particularly if you have found duplications of Dashboards, you can use this date to delete the older one, or newer ones.</li> </ol>
	<p>The last 2 empty title columns are to move your displayed dashboards into the desired order and to delete Dashboards where admissible. Use the arrows to move the displayed dashboards into your desired order. It is</p>

a transposed order, so the dashboard on the top will end up to be the dashboard starting from the left. Delete dashboards is only available to Administrators for Global, or owners of Multiple Dashboards, or your own user dashboard.

3. Click on 'Projects' on the navigation bar, then click on the 'Workspace Page' on the Projects Bar.



## The differences between Workspace and Dashboard

A project workspace is if you like, a Project Dashboard. It is managed by the Project Owner / Project Manager (Or Administrator, or a user with the right access). Anyone who has access to a project has access to the workspace. It is designed so that it can be the reporting place for a project, and where a project team can come together and start to work on problem areas in a project. Quickly access performance, risk, issue, documentation information etc about a project on a single page, rather than trying to manipulate views and layouts.

One of the main advantages between a workspace to a Dashboard is that there is no personal representation of the data as it is project specific, therefore a project manager doesn't need to worry that users accessing the workspace will be limited personal filtered data. The other advantage of a Workspace is that because the security of the Workspace is handled by OBS access, it's far simpler to create and manage portlets in a Workspace. On the other hand, whilst there are subtle differences, the look and feel of a Workspace is fundamentally the same as a Dashboard and can be treated as a Dashboard. For this reason I won't go into how to manage a workspace, as they are done the same way (just with less effort) as you would with P6 Dashboards, which I have already covered.

Because a Workspace and a Dashboard are essentially the same, or similar in many ways, I will only define the differences and the circumstances behind the differences.

<p><b>1. Launch Contract Management</b></p>	<p>Because the Workspace is limited to a single P6 Project, it can be linked to an O-PCM project, and O-PCM dashboards can be displayed and accessed directly via the P6 Workspace. Only users with the applicable access in both P6 and PCM can link inter-application projects.</p>
<p>Launch Contract Management <a href="#">Expand All</a> <a href="#">Collapse All</a> <a href="#">Customize</a></p>	
<p><b>2. No Project Filters</b></p>	<p>Because the Workspace is limited to one project only, users cannot impose filters like you can on a Dashboard. The Workspace configuration is based on the project that is open and selected in the top right hand corner. Every time you select a new Project it will open the design of that particular project's workspace design.</p>
<p>Select Project: <input type="text" value="City Center Office Building Addition"/></p>	
<p><b>3. No title needed for a Workspace</b></p>	<p>Because the Workspace is limited to only one project, it does not need a name like a Dashboard. It is merely the "Workspace of Project X"</p>
<p><b>4. There are no Personalized Portlets</b></p>	<p>There are no 'My' Portlets which display data based on a User or Resource allocation or ownership. All Portlets are Project Based and report data based on the project as a whole.</p>
<p><b>5. Oracle Primavera Contract Management Portlets</b></p>	<p>There are 8 O-PCM Dashboards available to P6 Projects linked to O-PCM. They will report on information directly from O-PCM and clicking on the portlet will navigate via new window to that Dashboard in O-PCM.</p>
<p><b>6. Access</b></p>	<p>Unlike a Dashboard where the designer has to decide on Access, either User; Multiple or Global, the Workspace is available to all users who have access to that particular project. Only Project Super Users; Administrators; Project Owners or users with the right Project Security Profile on that project's OBS assignment may change the design of the Workspace per project.</p>
<p><a href="#">Content</a> <a href="#">Layout</a> <a href="#">?</a></p>	



<b>7. Workgroups</b>	As mentioned before a Workgroup is a Sub-Workspace. To create workgroup dashboards you need to have this portlet displayed on the Workspace.
<input type="checkbox"/> Workgroups	
<b>8. Portfolio Views</b>	Unlike a Dashboard, a Workspace is limited to one project and therefore it would be impossible to use Portfolio Views to create Graphs and Scorecards. A Workspace has no Portfolio View option.
<input type="checkbox"/> Portfolio Views	Add
<b>9. Workspace Management</b>	Unlike Dashboards, there is no Workspace Management page, as there is only 1 page to manage per project.
Other than that, a Workspace can be managed and designed exactly the same as a Dashboard, by using the customise button and adding and removing Portlets as required. The results in these Portlets will be limited to the access of the team member who views it and limited to the information in the project that is open.	

## Conclusion

A Dashboard can be related to the Heads Up Display of a Motor Vehicle Dashboard. It is designed to be accessible to the desired driver, in one page and made up of a collection of Portlets. Dashboards are the most administrative intensive, however as it is the first page a user who logs onto P6 will see, diligence is required when designing them. Dashboards can be made up of multiple Projects; Programs and Portfolios. A Dashboard has 3 Access levels; User; Multiple User and Global, managed in the Access tab and displayed on the 'Manage Dashboard' Page.

A Workspace is almost identical to a Dashboard, also made up of similar Portlets, but is limited to one project only, and is less administrative intensive. The Workspace also allows many more Portlets from O-PCM and has no Personalized Portlets, as it is limited to the project rather than a person.

There is also a 'Sub-Workspace' available for large projects with a great user base called a Workgroup, designed for sub-teams on a project to focus on a particular aspect of a single project.

Something you need to keep into consideration. If you believe reading this document will make you a Dashboard Super user, unfortunately you are in for a nasty surprise. Compare it to learning a Work Processor, Spread Sheet software or an accounting package. Attending classes or reading documentation will give you the basics. Following that, you need to practice, test, and learn with trial and error. The same applies for P6 Dashboards, even P6 itself. Look at getting a training environment in your organisation.

One last thing as a tip if you are a Primavera P6 Consultant doing an Implementation. When designing the User Interface View library, keep the EPS page as the first page of the Projects View, however at a later stage of the implementation (when you have data), change the Workspace as the first page. Do this to exploit the functionality of the Workspace as too much emphasis is placed on the P6 Dashboards. Making the Workspace the first page a user sees when clicking on Projects will encourage the use thereof, and the organisation will learn the benefit of the Workspace.

## Tips and Tricks

- 1. ALWAYS SAVE AFTER EACH AND EVERY DESIGN CHANGE**
2. When designing a Dashboard for a particular business unit in your organisation, it is advised to create a matching User Interface View, and assigning the new dashboard to its default dashboards. The problem is that when new users are created, you need to assign this dashboard to them. If it is in the default dashboard list, it will automatically be assigned to a new user.
3. Know your audience. Creating a dashboard and assigning a filter that is too extensive might restrict too much information, particularly when creating a dashboard for your superior who has more access rights.
4. Data displayed on a dashboard is taken from the P6 Summary Tables, which requires project to be summarized. Summarization is a service that must be run by the project owner / planner which populates performance fields like %; durations; dates etc into a separate table.
5. When dealing with Multiple Views, things like Portfolio Views and filters need to be considered. You cannot use a multiple dashboard and include a Portfolio View to which an included user does not have access to. P6 will not allow you to save the dashboard in this case.
6. Workgroups will not function without a named resource loaded project and activity owners assigned to activities.
7. Use the P6 Help file when you design your first Dashboard before seeking outside help.
8. If you don't see a particular action described in this document on your P6 session, it is because your User Interface View does not allow it. If you see the action button but it is greyed out, usually means your User Interface View allows the action but your Global / Project Security Profile assigned doesn't allow it. Contact your P6 Administrator / Support Desk.
9. Dashboards; Workspace and Workgroups are all functions available in the Web interface only, not in the Windows Client / P6 Professional.
10. Limit the rows to the absolute minimum Portlets required. Having too many lines or rows of information affects performance.
11. Using custom Portlets to show data from outside the network that cannot be managed by the P6 LDAP security features. Use discretion.
12. Modify Portlets where available to show minimal information. Users need to see the highlights only, then drill into the details in the other pages in P6 to make their decisions and actions.
13. For most businesses, there is a bigger population of users managing projects than there are users managing portfolios. It would therefore be beneficial for users to focus on the Workspace to report on projects rather than the Dashboard. This is merely a tip and not applicable for all businesses.

#### 14. ALWAYS SAVE AFTER EACH AND EVERY DESIGN CHANGE

At this point you may be asking, well how should I structure my Dashboards. As a recommendation, I would suggest to makeup the various dashboards as follows:

1. All Global Dashboards to be limited to 1 per Department; Phases; Portfolio; Managing Director; Target Sector or Objective. Because global dashboards can be available to all users in the organisation, you will want to keep the makeup of these portlets in the dashboards collectively the same. This encourages competition between the various Departments; Phases etc.
2. All Multiple Dashboards to be maintained by a responsible person, usually a Program Manager, by Program. It is the Program Manager's job to share or not share his / her Multiple Dashboard with the desired Program P6 Community.
3. User Dashboards to be limited to 'Personal Workspace', meaning each user is given by default, a personal workspace dashboards to do with as the like. It is their responsibility to ensure that the projects they are associated with are in the dashboard filter, which encourages users to take project ownership.
4. Set the security to ONLY allow project owners to modify project workspace depending on the projects they 'own'. Again it encourages ownership. Many of the portlets in Dashboards and Workspace are driven by Activity / Project 'Owners' which in my experience is a part that is always left out. It's obvious that users will shy away from identifying themselves as an 'owner' of something new, a perfectly normal human attribute, and something that you want to continuously promote.

This is merely a guideline or even a place to start with as there is an infinite configuration you can use to makeup the dashboards in P6.

## Available Dashboard Portlets

This next section of the paper will, with screenshots, show you what portlets are available to include in your Dashboards, Workspace and Workgroups. In addition, you will be given links on where to find complete details of the Portlet (where available) on the Documentation section of Oracle Primavera.

Links will show for the following versions in this order:

1. Oracle Primavera P6 EPPM Version R8.2
2. Oracle Primavera P6 EPPM Version R8.1
3. Oracle Primavera P6 EPPM Version R8.0

## Appendix 1a: Available P6 Performance Dashboard Portlets

### Schedule Performance Portlet:

Legend: ✖ Critical ⚠ Warning ✔ Acceptable ★ Exceptional

	To Date		Forecast at Completion	
	Schedule	Labor Units	Schedule	Labor Units
<b>Construction Projects</b>	✔ 2.5d late	✔ 99.34d over	✔ 16.0d late	✔ 92.85d over
City Center Office Building Addition	✔ 7.6d late	⚠ 22.93d over	✔ 9.5d late	✔ 23.46d over
Haitang Corporate Park	✔ 0.5d early	✔ 15.06d under	✔ 13.2d late	✔ 38.81d under
Harbour Pointe Assisted Living Center	✔ 4.1d late	⚠ 57.17d over	⚠ 28.3d late	✔ 73.15d over
Juniper Nursing Home	✔ 1.2d late	✔ 34.30d over	✔ 17.0d late	✔ 35.05d over
Nesbid Building Expansion	No Progress	No Progress	No Progress	No Progress
Saratoga Senior Community	No Progress	No Progress	No Progress	No Progress

Page: 1 of 1

Use this portlet to view both current and forecast schedule summary performance information, in either costs or labor units. Positive performance schedule values indicate that the project is ahead of schedule; negative values indicate that the project is behind schedule. Positive performance cost values indicate that the project is under budget; negative values indicate that the project is over budget. Status indicators help you gauge whether a variance is within an acceptable range or whether you will need to take corrective action, based on thresholds you define.

- P6 R8.2: [Schedule Performance Portlet](#)
- P6 R8.1: [Schedule Performance Portlet](#)
- P6 R8.0: [Schedule Performance Portlet](#)

### Earned Value Performance:

Legend: ✖ Critical ⚠ Warning ✔ Acceptable ★ Exceptional

	To Date		Forecast at Completion	
	Schedule	Labor Units	Schedule	Labor Units
<b>Construction Projects</b>	✔ 56.12d over	✔ 99.34d over	✔ 542.06d over	✔ 981.45d over
City Center Office Building Addition	⚠ 17.58d over	⚠ 22.93d over	⚠ 109.82d over	⚠ 154.06d over
Haitang Corporate Park	✔ 1.07d under	✔ 15.06d under	✔ 3.43d under	✔ 47.96d under
Harbour Pointe Assisted Living Center	✔ 30.62d over	⚠ 57.17d over	✔ 213.28d over	⚠ 409.89d over
Juniper Nursing Home	✔ 8.99d over	✔ 34.30d over	✔ 69.76d over	✔ 269.35d over
Nesbid Building Expansion	No Progress	No Progress	No Progress	No Progress
Saratoga Senior Community	No Progress	No Progress	No Progress	No Progress

Use this portlet to view both current and forecast earned value schedule variance (SV), cost variance (CV), or labor unit variance calculations. Data are calculated and displayed in either costs or labor units, depending on your preference. Negative values indicate unfavorable performance. Status indicators help you gauge whether a variance is within an acceptable range or whether you will need to take corrective action, based on the thresholds you define.

- P6 R8.2: [Earned Value Performance Portlet](#)
- P6 R8.1: [Earned Value Performance Portlet](#)
- P6 R8.0: [Earned Value Performance Portlet](#)

## Index Performance:

Index Performance			
Legend:  Critical  Warning  Acceptable  Exceptional			
	Schedule Performance Index	Cost Performance Index	To Complete Per
<b>Construction Projects</b>	0.98	0.96	
City Center Office Building Addition	0.93	0.91	
Haitang Corporate Park	1.00	1.04	
Harbour Pointe Assisted Living Center	0.97	0.95	
Juniper Nursing Home	0.99	0.96	
Nesbid Building Expansion	No Progress	No Progress	No Progress
Saratoga Senior Community	No Progress	No Progress	No Progress

Page: 1 of 1

Use this portlet to view Schedule Performance Index (SPI), Cost Performance Index (CPI), and To Complete Performance Index (TCPI) calculations. SPI indicates whether you are meeting earned and planned values within your schedule; CPI indicates whether you have spent money over the budget to date; TCPI enables you to determine the level of performance needed to achieve the cost or time objectives. Status indicators help you gauge whether these index values are within an acceptable range or whether you will need to take corrective action, based on thresholds you define.

- P6 R8.2: [Index Performance Portlet](#)
- P6 R8.1: [Index Performance Portlet](#)
- P6 R8.0: [Index Performance Portlet](#)

## Project Statistics:

Project Statistics			
Customize		Display <input checked="" type="radio"/> List <input type="radio"/> Group	
Name	Project Owner	Start	Finish
<b>Construction Projects</b>		01-Sep-10 08:00 AM A	05-Jan-15 03:24 PM
City Center Office Building Addition	Wendy Resner	01-Nov-10 08:00 AM A	03-Jul-13 08:53 AM
Haitang Corporate Park	Jeff Young	01-Sep-10 08:00 AM A	11-Jan-13 01:35 PM
Harbour Pointe Assisted Living Center	Jeff Young	01-Sep-10 08:00 AM A	24-Sep-14 10:40 AM
Juniper Nursing Home	Wendy Resner	01-Nov-10 08:00 AM A	08-Jan-14 01:48 PM
Nesbid Building Expansion	Paul Kim	01-Jul-11 08:00 AM	17-Oct-13 01:05 PM
Saratoga Senior Community	Paul Kim	01-Jun-11 08:00 AM	05-Jan-15 03:24 PM

Page: 1 of 1

Use this portlet to analyse project information in row and column format for a particular project or project group. Depending on your information needs, you can customize the portlet to select the columns of information you want to appear, and specify the display format to analyse data in a way that is meaningful to you. In a dashboard, the portlet displays the information you select down to the WBS level for all projects included in the current dashboard filter. For example, if you filter a dashboard by a portfolio, the Project Statistics portlet displays data for all projects included in that portfolio.

- P6 R8.2: [Project Statistics Portlet](#)
- P6 R8.1: [Project Statistics Portlet](#)
- P6 R8.0: [Project Statistics Portlet](#)

## Project Health:

Project Health	
	City Center Office Building Addition is 14.9% complete, according to budget-based Performance Percent Complete calcul
	Haitang Corporate Park is 31.4% complete, according to budget-based Performance Percent Complete calculation. It is 15
	Harbour Pointe Assisted Living Center is 13.9% complete, according to budget-based Performance Percent Complete cal
	Juniper Nursing Home is 12.7% complete, according to budget-based Performance Percent Complete calculation. It is 34.
	Nesbid Building Expansion has not started.
	Saratoga Senior Community has not started.

Page: 1 of 1

Use this portlet to quickly see how well a portfolio or individual project is performing. Status indicators identify areas where you might need to focus attention or implement corrective action.

- P6 R8.2: [Project Health Portlet](#)
- P6 R8.1: [Project Health Portlet](#)
- P6 R8.0: [Project Health Portlet](#)

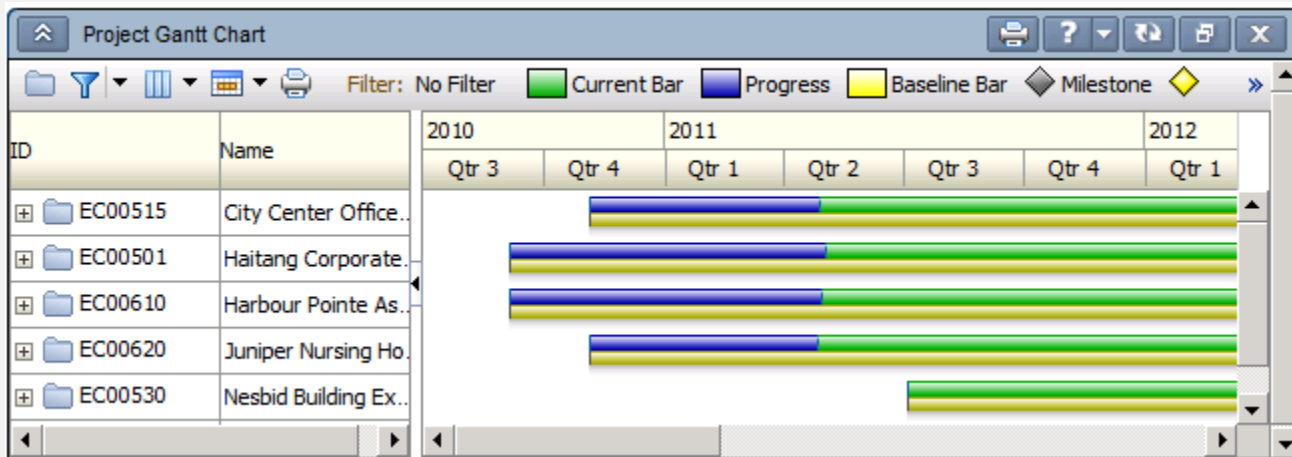
## Project Notebooks:

Project Notebooks	
Notebook Topic	Description
<ul style="list-style-type: none"> <li>City Center Office Building Addition           <ul style="list-style-type: none"> <li>Description</li> <li>Executive Feedback</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>Haitang Corporate Park           <ul style="list-style-type: none"> <li>Description</li> <li>Executive Feedback</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>Harbour Pointe Assisted Living Center           <ul style="list-style-type: none"> <li>Recent Accomplishments</li> <li>Sponsor Feedback</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>Juniper Nursing Home</li> </ul>	

Use this portlet to view all notebooks assigned to the selected project. In a dashboard, the Project Notebooks portlet displays all of the notebooks assigned to the projects that meet the dashboard's selected filter criteria. Notebooks are used to store and share notes relating to a project. When you add notes for a given notebook topic, you can enter text and use HTML editing features such as formatting text and lists, inserting pictures, adding hyperlinks and e-mail links, and inserting tables.

- P6 R8.2: [Project Notebooks Portlet](#)
- P6 R8.1: [Project Notebooks Portlet](#)
- P6 R8.0: [Project Notebooks Portlet](#)

## Project Gantt Chart:



Use this portlet to quickly view the status of projects and review its milestones.

The table on the left side of the portlet lists projects that meet the portfolio, project code value, or project filter criteria specified in the dashboard's Filter by field. In the table, you can expand the project rows to display a list of each project's start and finish milestone activities. You can filter the milestones that display in the portlet by selecting an activity code filter.

The Gantt chart on the right side of the portlet displays a bar for each project, which represents the span between the Project Planned Start and Scheduled Finish dates of the project. The blue section of each project bar indicates current progress, while the green section of each bar indicates remaining effort. When you expand a project row in the table to display the project's milestone activities, the Gantt chart shows milestone icons (◆) for each start and finish milestone activity in the project and baseline milestone (◇) icons for each start and finish milestone in the baseline if one has been applied to the project.

- P6 R8.2: [Project Gantt Chart Portlet](#)
- P6 R8.1: [Project Gantt Chart Portlet](#)
- P6 R8.0: [Project Gantt Chart Portlet](#)



## Appendix 1b: Available 'Personal Information' Dashboard Portlets

### My Projects:

Name	Start Date	Finish Date	Percent Complete	Last Summarized
<a href="#">City Center Office Building Addition</a>	01-Nov-10 08:00 AM A	03-Jul-13 08:53 AM	18.6%	07-Oct-10 02:29
<a href="#">Haitang Corporate Park</a>	01-Sep-10 08:00 AM A	11-Jan-13 01:35 PM	28.1%	07-Oct-10 02:29
<a href="#">Harbour Pointe Assisted Living Center</a>	01-Sep-10 08:00 AM A	24-Sep-14 10:40 AM	16.3%	06-Oct-10 02:36
<a href="#">Juniper Nursing Home</a>	01-Nov-10 08:00 AM A	08-Jan-14 01:48 PM	15.6%	06-Oct-10 02:34
<a href="#">Nesbid Building Expansion</a>	01-Jul-11 08:00 AM	17-Oct-13 01:05 PM	0%	07-Oct-10 02:29
<a href="#">Spartan Senior Community</a>	01-Jun-11 08:00 AM	05-Jan-15 03:24 PM	0%	06-Oct-10 02:33

Use this portlet to view projects you are the owner of, have OBS access to, or are assigned to as a resource or as an activity owner. The portlet displays the project start and finish dates, current percentage complete, date last summarized, and the project owner. You can click a project name link to open the project.

- P6 R8.2: [My Projects Portlet](#)
- P6 R8.1: [My Projects Portlet](#)
- P6 R8.0: [My Projects Portlet](#)

### My Workgroups:

Workgroup Name	
<input type="checkbox"/>	<a href="#">Civil Works</a>
<input type="checkbox"/>	<a href="#">Commission Group</a>
<input type="checkbox"/>	<a href="#">Mechanical Works</a>
<input type="checkbox"/>	<a href="#">Piping Works</a>
<input type="checkbox"/>	<a href="#">Project Administrators</a>
<input type="checkbox"/>	<a href="#">Quality QAQC Group</a>
<input type="checkbox"/>	<a href="#">Structural Group</a>

Page: 1 of 1

Use this portlet to view, by project, all workgroups with which you are associated. Workgroups are organized by project.

- P6 R8.2: [My Workgroups Portlet](#)
- P6 R8.1: [My Workgroups Portlet](#)
- P6 R8.0: [My Workgroups Portlet](#)

## My Activities:

Activity Name	Start Date	Finish Date	Remaining Units	Primary Resource
Test and Balance HVAC Equipment	03-Jan-13 10:11 AM	07-Jan-13 10:59 AM	2.10d	Operator

Page: 1 of 1

Use this portlet to view activities to which you are either assigned as a resource or designated as the activity owner. The portlet displays activities based on assignment dates and your current portlet customization settings. You can click an activity to open it.

- P6 R8.2: [My Activities Portlet](#)
- P6 R8.1: [My Activities Portlet](#)
- P6 R8.0: [My Activities Portlet](#)

## My Risks:

Name	ID
Harbour Pointe Assisted Living Center	
Site access restricted for 2 weeks	R002
New roof coating cuts roof install time	R003
Poor ground conditions	R004

Page: 1 of 1

Using your portfolio, project, or project code filter criteria specified for the current dashboard, the My Risks portlet displays information about your associated risks. You can customize the portlet to specify the columns of information you want to display, as well as the types of risks you want to appear.

- P6 R8.2: [My Risks Portlet](#)
- P6 R8.1: [My Risks Portlet](#)
- P6 R8.0: [My Risks Portlet](#)

## My Issues:

Issue Name	Priority	Owner	Resolution Date	Status
Project: EC00501 - Haitang Corporate Park				
Project: EC00610 - Harbour Pointe Assisted Living Center				
Building 2 Subject To Delay	High	Finishes & Fit-out Subcontractor		Open
Finish Date Variance (days) is -21d on WBS: Harbour Pointe.2.4	Normal			Open
Finish Date Variance (days) is -6d on WBS: Harbour Pointe.1.2	Normal			Open
		Finishes & Fit-		

Use this portlet to view information about issues with which you are associated. The information that appears depends on the display format and customize options you select.

- P6 R8.2: [My Issues Portlet](#)
- P6 R8.1: [My Issues Portlet](#)
- P6 R8.0: [My Issues Portlet](#)

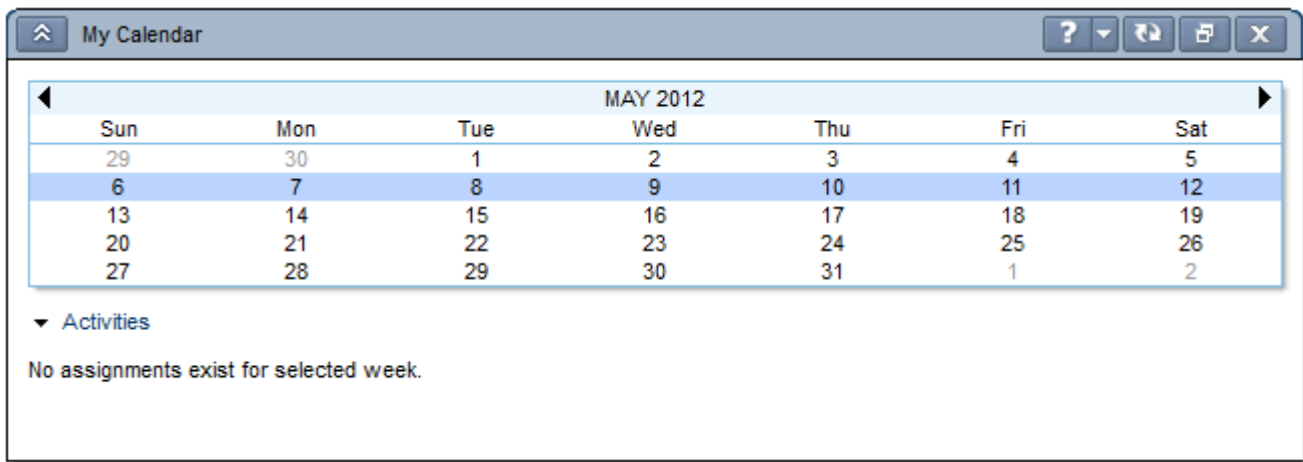
## My Documents:

Title	Version	Project	Access Time
<i>No information is available.</i>			

Use this portlet for quick access to project documents you have recently worked on or accessed. It also enables you to create and manage private documents for your own personal use. By default, the My Documents portlet contains two tabs, Recent Project Documents and My Private Document.

- P6 R8.2: [My Documents Portlet](#)
- P6 R8.1: [My Documents Portlet](#)
- P6 R8.0: [My Documents Portlet](#)

## My Calendar:



My Calendar

MAY 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

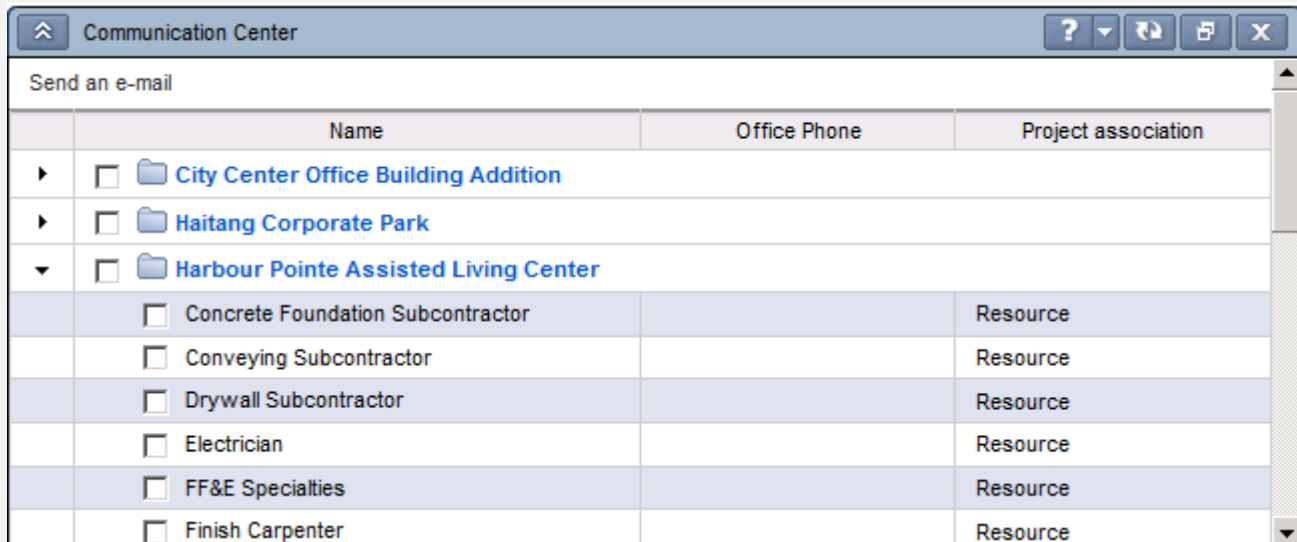
▼ Activities

No assignments exist for selected week.

Use this portlet to see a week's worth of activities that pertain to your projects. The My Calendar portlet displays all activities that you are either assigned to as a resource or designated as the activity owner. Display the current week or click past or future dates to see the list of activities and milestones for the selected week. The selected week is highlighted in blue.

- P6 R8.2: [My Calendar Portlet](#)
- P6 R8.1: [My Calendar Portlet](#)
- P6 R8.0: [My Calendar Portlet](#)

## Communication Centre:



Send an e-mail

	Name	Office Phone	Project association
▶	<input type="checkbox"/> City Center Office Building Addition		
▶	<input type="checkbox"/> Haitang Corporate Park		
▼	<input type="checkbox"/> Harbour Pointe Assisted Living Center		
	<input type="checkbox"/> Concrete Foundation Subcontractor		Resource
	<input type="checkbox"/> Conveying Subcontractor		Resource
	<input type="checkbox"/> Drywall Subcontractor		Resource
	<input type="checkbox"/> Electrician		Resource
	<input type="checkbox"/> FF&E Specialties		Resource
	<input type="checkbox"/> Finish Carpenter		Resource

Use this portlet to share data and communicate with other P6 users who are associated with a project, including the project owner. All projects you are associated with are listed in the portlet; you can select to communicate with all of a project's team members or with members you select.

- P6 R8.2: [Communication Center Portlet](#)
- P6 R8.1: [Communication Center Portlet](#)
- P6 R8.0: [Communication Center Portlet](#)

## Appendix 1c: Available 'Resource' Dashboard Portlets

### Resource Team Summary:

Resource	Primary Role	Active Projects
Alice Wynn	Product Tester	5
Amit Chopra	Developer	3
Cindy Lee	Product Designer	5
Gary Marshall	Product Analyst	5
Jo Wren	Project Management Office	7
Lane Mathis, CIO		0
Molly Abraham	Project Management Office	3
Peg Ithan	Sales	5
Roy Li	Project Management Office	6

Use this portlet to view the resources, their primary role, and the number of active projects for a team you select. The portlet lists those members of the resource team that you have access to, based on resource security. For example, if you choose to view a global resource team that includes a combination of resources within and outside of your resource access node, you see only the team members to which you have access. If you choose to view a resource team that is available only to you, all resources that you added to the team are listed.

- P6 R8.2: [Resource Team Summary Portlet](#)
- P6 R8.1: [Resource Team Summary Portlet](#)
- P6 R8.0: [Resource Team Summary Portlet](#)

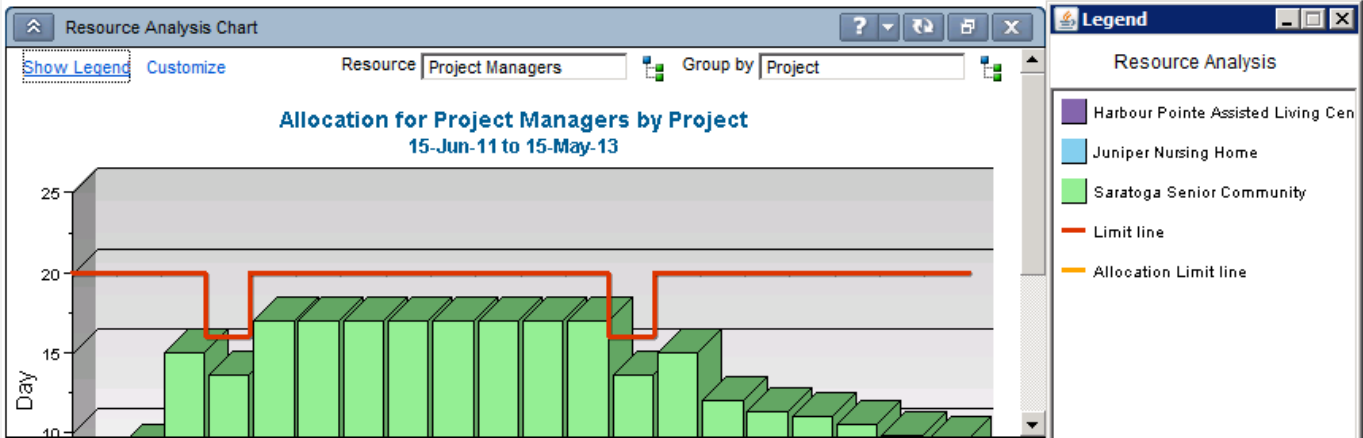
### Open Request for Resources

Name	Unstaffed Units	Staffed Units
Business Analyst Level 1	397.63d	0.00d
Alliance Portal Integration Project	86.15d	0.00d
Nexus Project	190.53d	0.00d
eBusiness Transformation Program	120.95d	0.00d
Business Process Analyst	519.33d	0.00d
Alliance Portal Integration Project	112.52d	0.00d
Nexus Project	248.85d	0.00d
eBusiness Transformation Program	157.96d	0.00d
Change Management Coordinator	324.26d	0.00d

Use this portlet to view the staffing for projects to which you are associated.

- P6 R8.2: [Open Requests for Resources Portlet](#)
- P6 R8.1: [Open Requests for Resources Portlet](#)
- P6 R8.0: [Open Requests for Resources Portlet](#)

## Resource Analysis Chart

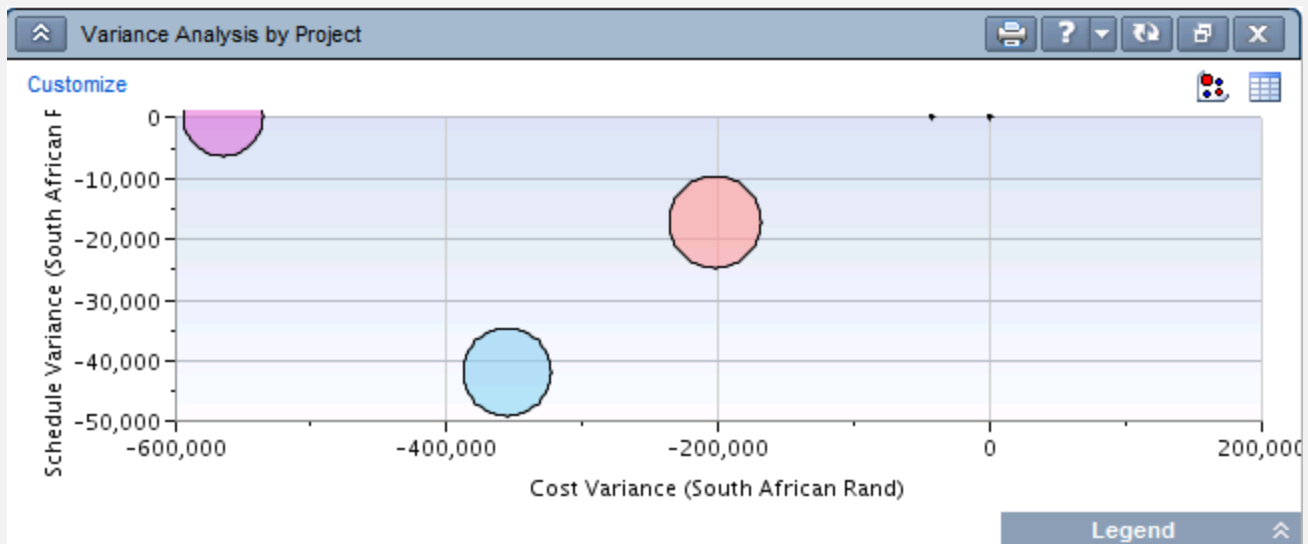


Use this portlet to view a variety of chart formats plotting the total (remaining plus actuals) units or costs for a resource, resource team, or resource code you select.

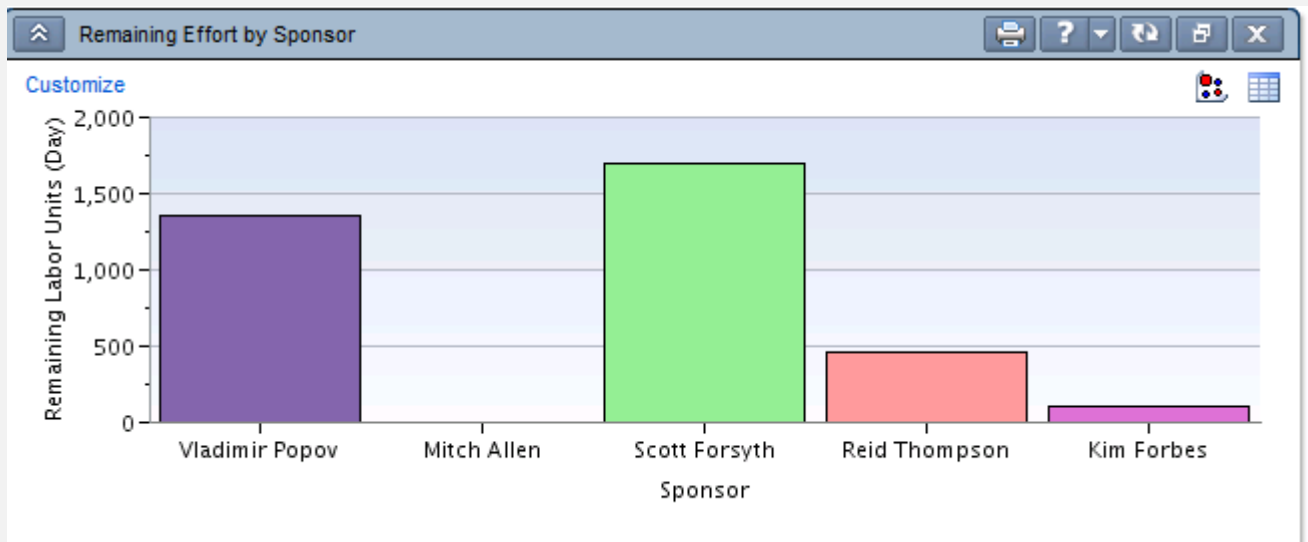
- P6 R8.2: [Resource Analysis Chart Portlet](#)
- P6 R8.1: [Resource Analysis Chart Portlet](#)
- P6 R8.0: [Resource Analysis Chart Portlet](#)

## Appendix 1d: Examples of 'Portfolio View' Dashboard Portlets

### Bubble Chart



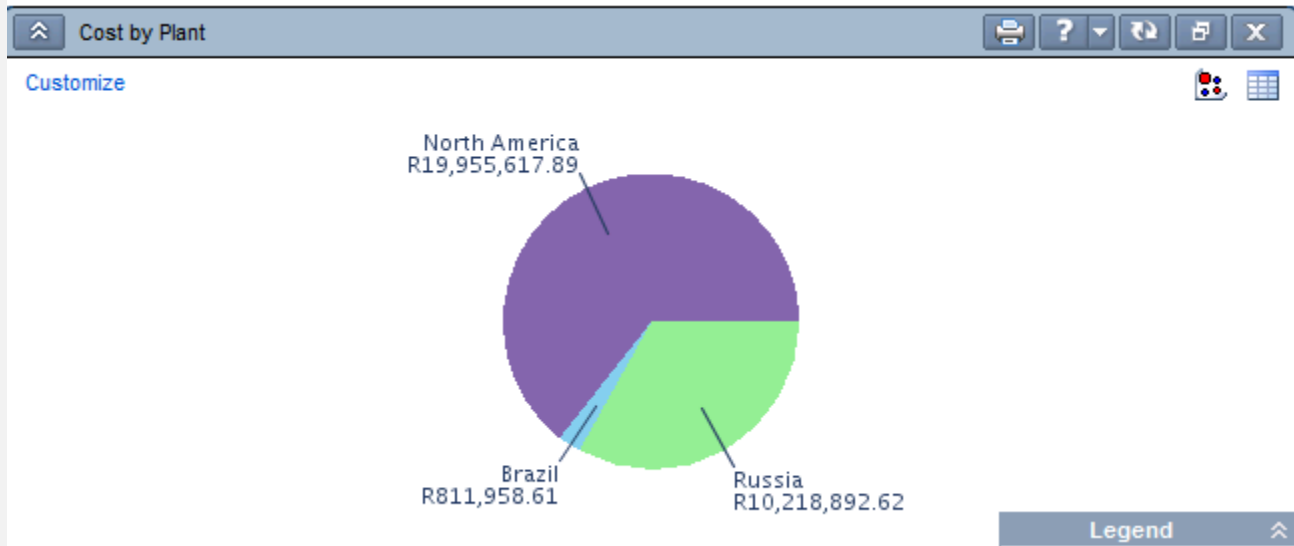
### Histogram



#### CHARLIE'S TIP:

You can also use Stacked Histograms for variable Y axis.

## Pie Chart



## Scorecard

Valuation Metrics

Expand Collapse Export Spreadsheet Customize

Name	Current Score	Previous Score
<b>Total</b>	<b>3.40</b>	<b>3.20</b>
ACH Integration Project	3.00	3.00
Claims Processing Upg...	4.00	4.00
Data Center Consolidat...	2.00	2.00
Digitization Program	4.00	4.00
ERP Legacy Merge	3.00	3.00
Employee Onboarding ...	4.00	2.00
Katalyst Virtualization	3.00	4.00
MDM Project	3.00	3.00



Cost Worksheet

Project	Original Budget	Revised Budget	Projected Budget	Original Commitment	Approved Commitment	Revised Commitment
<b>Total</b>	<b>\$1,400,000.00</b>	<b>\$1,400,000.00</b>	<b>\$1,417,000.00</b>	<b>\$557,595.70</b>	<b>\$0.00</b>	
OFFC	\$1,400,000.00	\$1,400,000.00	\$1,417,000.00	\$557,595.70	\$0.00	

Use this portlet to view cost data for all linked projects. Available only in environments integrating P6 with Contract Management. This enables you to have a more complete view of projects and their contract status.

- P6 R8.2: [Cost Worksheet Portlet](#)
- P6 R8.1: [Cost Worksheet Portlet](#)
- P6 R8.0: [Cost Worksheet Portlet](#)

**CHARLIE'S TIP:**

If you don't see any data, the project is not in the Dashboard Filter, you don't have access to projects in the Dashboard Filter, or there are no P6 to PCM connections made. You need to use the 'Set Project Preferences' option in the EPS page, then on the 'Contract Management' tab, make to the P6 Project Connection to the PCM connection.

Earned Value Performance

	To Date		Forecast at Completion	
	Schedule	Labor Units	Schedule	Labor Units
<b>Cordova - Plant Expansion &amp; Modernization</b>	⚠️ 49.54d over	⚠️ 53.90d over	⚠️ 135.51d over	⚠️ 156.51d over
Automated System	❌ 43.42d over	❌ 39.04d over	❌ 70.54d over	❌ 78.30d over
Office Building Addition	✅ 3.15d over	✅ 15.86d over	✅ 8.81d over	✅ 44.68d over
Conveyor System	❌ 2.97d over	✅ 1.00d under	❌ 43.81d over	✅ 17.71d over

Page: 1 of 1

Use this portlet to view both current and forecast earned value schedule variance (SV), cost variance (CV), or labor unit variance calculations. Data are calculated and displayed in either costs or labor units, depending on your preference. Negative values indicate unfavorable performance. Status indicators help you gauge whether a variance is within an acceptable range or whether you will need to take corrective action, based on the thresholds you define.

- P6 R8.2: [Earned Value Performance Portlet](#)
- P6 R8.1: [Earned Value Performance Portlet](#)
- P6 R8.0: [Earned Value Performance Portlet](#)

Index Performance

	Schedule Performance Index	Cost Performance Index	To Complete Performance Index
<b>Cordova - Plant Expansion &amp; Modernization</b>	⚠️ 0.94	⚠️ 0.94	
Automated System	❌ 0.81	❌ 0.83	
Office Building Addition	✅ 0.99	✅ 0.97	
Conveyor System	❌ 0.83	✅ 1.07	

Page: 1 of 1

Use this portlet to view Schedule Performance Index (SPI), Cost Performance Index (CPI), and To Complete Performance Index (TCPI) calculations. SPI indicates whether you are meeting earned and planned values within your schedule; CPI indicates whether you have spent money over the budget to date; TCPI enables you to determine the level of performance needed to achieve the cost or time objectives. Status indicators help you gauge whether these index values are within an acceptable range or whether you will need to take corrective action, based on thresholds you define.

- P6 R8.2: [Index Performance Portlet](#)
- P6 R8.1: [Index Performance Portlet](#)
- P6 R8.0: [Index Performance Portlet](#)

## Schedule Performance

Schedule Performance				
Legend:  Critical  Warning  Acceptable  Exceptional				
	To Date		Forecast at Completion	
	Schedule	Labor Units	Schedule	Labor Units
Cordova - Plant Expansion & Modernization	7.9d late	53.90d over	11.0d late	4.82d under
Automated System	27.3d late	39.04d over	27.0d late	7.04d over
Office Building Addition	0.4d late	15.86d over	12.0d late	10.86d under
Conveyor System	3.6d late	1.00d under	11.0d late	1.00d under

Page: 1 of 1

Use this portlet to view both current and forecast schedule summary performance information, in either costs or labor units. Positive performance schedule values indicate that the project is ahead of schedule; negative values indicate that the project is behind schedule. Positive performance cost values indicate that the project is under budget; negative values indicate that the project is over budget. Status indicators help you gauge whether a variance is within an acceptable range or whether you will need to take corrective action, based on thresholds you define. Data is calculated and displayed in either costs or labor units, depending on your preference selection

- P6 R8.2: [Schedule Performance Portlet](#)
- P6 R8.1: [Schedule Performance Portlet](#)
- P6 R8.0: [Schedule Performance Portlet](#)

## Project Statistics

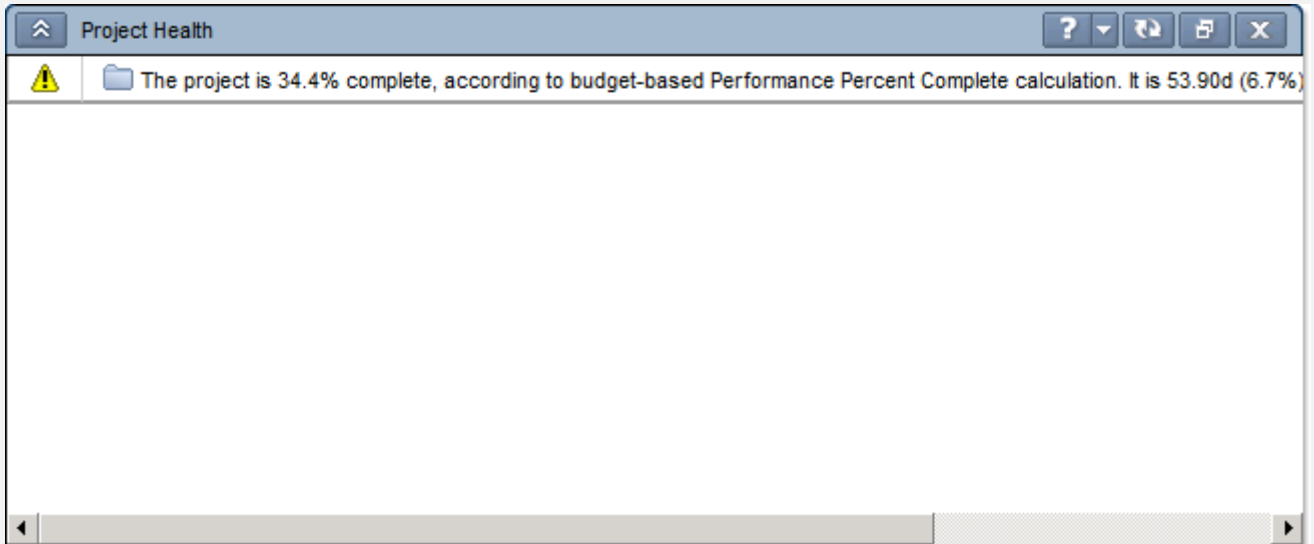
Project Statistics			
<a href="#">Customize</a>			Display <input checked="" type="radio"/> List <input type="radio"/> Group
Name	Project Owner	Start	Finish
Cordova - Plant Expansion & Modernization	Wendy Resner	01-Dec-10 08:00 AM A	29-May-12 05:00 PM
Automated System	Wendy Resner	01-Dec-10 08:00 AM A	07-Dec-11 05:00 PM
Office Building Addition	Wendy Resner	01-Dec-10 08:00 AM A	16-Nov-11 05:00 PM
Conveyor System	Wendy Resner	14-Feb-11 08:00 AM A	29-May-12 05:00 PM

Page: 1 of 1

Use this portlet to analyze project information in row and column format for a particular project or project group. Depending on your information needs, you can customize the portlet to select the columns of information you want to appear, and specify the display format to analyze data in a way that is meaningful to you. In a project workspace, the portlet displays the information you select down to the WBS level for the currently open project.

- P6 R8.2: [Project Statistics Portlet](#)
- P6 R8.1: [Project Statistics Portlet](#)
- P6 R8.0: [Project Statistics Portlet](#)

## Project Health



Use this portlet to quickly see how well a portfolio or individual project is performing. Status indicators (shown below) identify areas where you might need to focus attention or implement corrective action.

- P6 R8.2: [Project Health Portlet](#)
- P6 R8.1: [Project Health Portlet](#)
- P6 R8.0: [Project Health Portlet](#)

Critical Activities Behind Schedule

Critical Activities behind Schedule			
Activity	Days Late	Total Float	
Install Conveyor 211	11.0d	0.0d	
Install Conveyor 212	12.0d	0.0d	
Install Conveyor 213	12.0d	0.0d	
Install Conveyor 214	12.0d	0.0d	
Field Piping	12.0d	0.0d	
Field Wiring	12.0d	0.0d	
Conveyor System Complete	11.0d	0.0d	
Start-Up & Debug System	11.0d	0.0d	
Finishes Milestone	12.0d	0.0d	
Test and Balance HVAC Equipment	12.0d	0.0d	

Use this portlet to view all project activities identified as critical. This means they have zero or negative float, a zero or negative finish date variance, and are behind schedule for the project. The project baseline is used to calculate and display summarized baseline data, generate enterprise-wide reporting, and for comparing to the current open project on the Activities page. It is also used for milestone status reporting and to determine which activities are listed in the Critical Activities Behind Schedule portlet.

- P6 R8.2: [Critical Activities Behind Schedule Portlet](#)
- P6 R8.1: [Critical Activities Behind Schedule Portlet](#)
- P6 R8.0: [Critical Activities Behind Schedule Portlet](#)



Milestone Status

Milestone Status				
Milestone Name	Responsible Resource	Due	Completed	
Begin Structural Phase		15-Apr-11 08:00 AM		
Rough-In Phase Begins		06-Jun-11 08:00 AM		
Structure Complete		08-Jun-11 05:00 PM		
Close-In Phase Begins		21-Jul-11 08:00 AM		
Building Enclosed		03-Aug-11 05:00 PM		
Rough In Complete		30-Aug-11 05:00 PM		
Production Start		15-Aug-11 08:00 AM		
Finishes Phase Begins		21-Sep-11 08:00 AM		
Finishes Milestone		27-Oct-11 05:00 PM		
Building Addition Complete		31-Oct-11 05:00 PM		

Use this portlet to view the project milestones completed or due within a specified number of days before and after the current date. Milestones are sorted by their due dates. E-mail links let you easily contact team members associated with each milestone.

- P6 R8.2: [Milestone Status Portlet](#)
- P6 R8.1: [Milestone Status Portlet](#)
- P6 R8.0: [Milestone Status Portlet](#)

## Notebook Topics


Notebook Topic	Description
 <a href="#">Recent Accomplishments</a>	▶
 <a href="#">Sponsor Feedback</a>	▶

Page: 1 of 1

Use this portlet to view all notebooks assigned to the selected project. Notebooks are used to store and share notes relating to a project. When you add notes for a given notebook topic, you can enter text and use HTML editing features such as formatting text and lists, inserting pictures, adding hyperlinks and e-mail links, and inserting tables.

- P6 R8.2: [Project Notebooks Portlet](#)
- P6 R8.1: [Project Notebooks Portlet](#)
- P6 R8.0: [Notebook Topics Portlet](#)

## Over allocated Resources

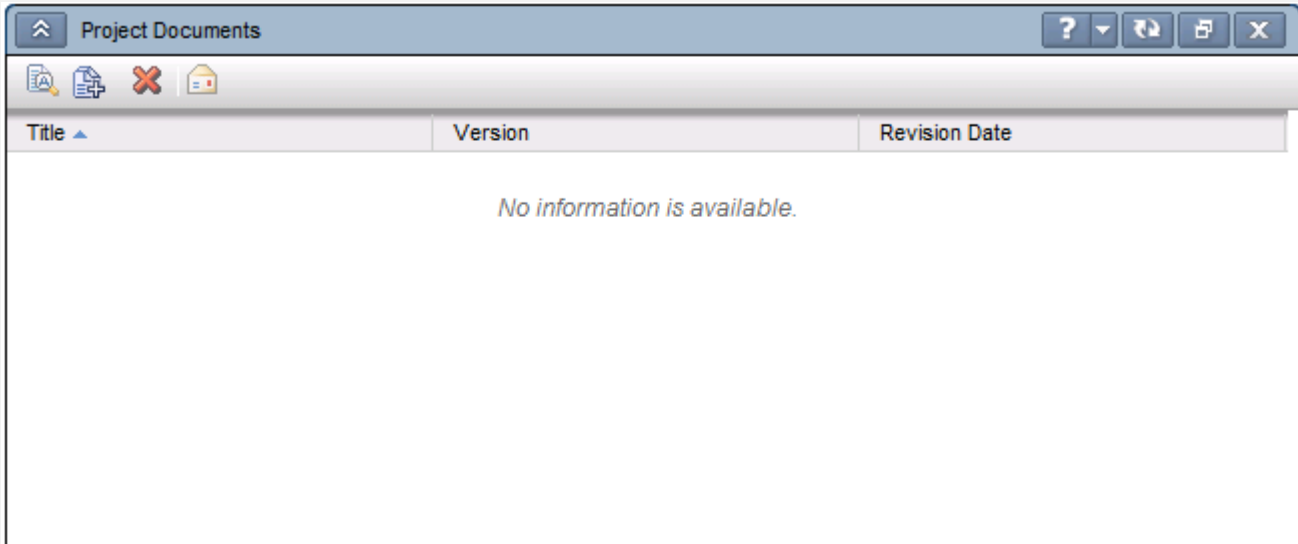
Resource Name	Roles on Project
 <a href="#">Field Eng-Senior</a>	

Page: 1 of 1

Use this portlet to view the name and role of each project resource that is over allocated. You can click on a resource name to view allocation details.

- P6 R8.2: [Overallocated Resources Portlet](#)
- P6 R8.1: [Overallocated Resources Portlet](#)
- P6 R8.0: [Overallocated Resources Portlet](#)

## Project Documents

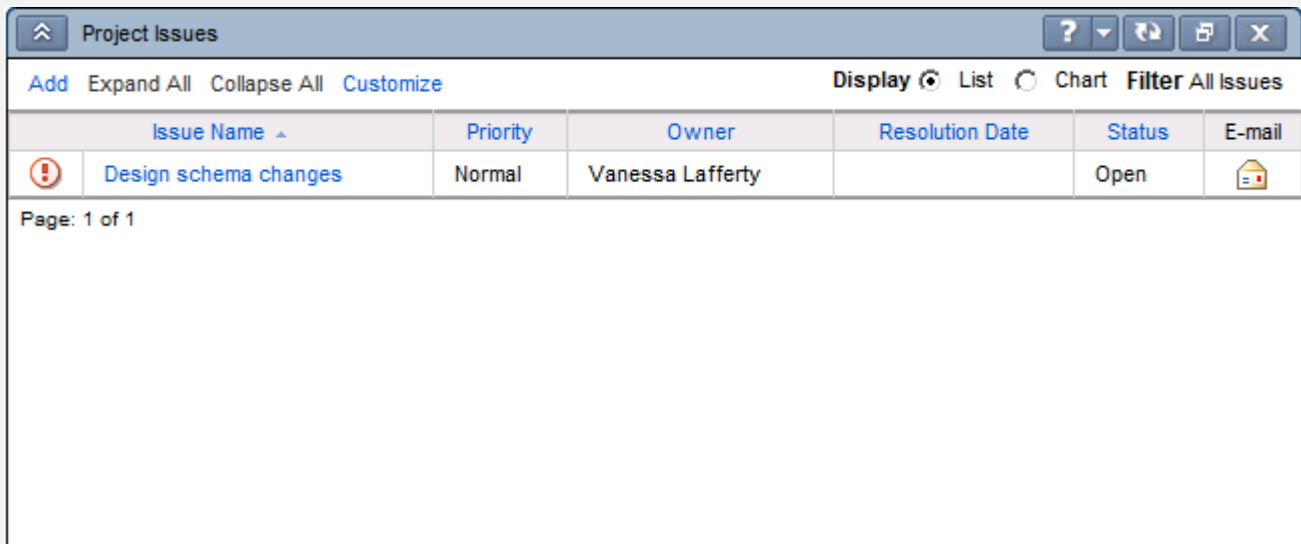




Title ▲	Version	Revision Date
<i>No information is available.</i>		

Use this portlet to view all documents that have been added to the project, modify document details, and to add new documents to the project.

- P6 R8.2: [Project Documents Portlet of the Workspace Page \(with content repository\)](#)
- P6 R8.1: [Project Documents Portlet of the Workspace Page \(with content repository\)](#)
- P6 R8.0: [Project Documents Portlet of the Workspace Page \(with content repository\)](#)

## Project Issues









Issue Name ▲	Priority	Owner	Resolution Date	Status	E-mail
 Design schema changes	Normal	Vanessa Lafferty		Open	

Page: 1 of 1

Use this portlet to view information about issues that belong to the project. The information that appears depends on the display format and customize options you select.

- P6 R8.2: [Project Issues Portlet](#)
- P6 R8.1: [Project Issues Portlet](#)
- P6 R8.0: [Project Issues Portlet](#)

## Project Risks

Name	Owner	Category	Status
 <a href="#">High number of software bugs</a>	Automation Systems Engineer	Quality	Proposed
 <a href="#">Fabrication delays</a>	Fabrication	Performance & Reliability	Active
 <a href="#">Reuse previous design work</a>	Design Engineer	Quality	Managed (Closed)
 <a href="#">Delivery delay</a>	Fabrication	Performance & Reliability	Active
 <a href="#">Poor ground conditions</a>	Field Engineer	Performance & Reliability	Rejected (Closed)
 <a href="#">Line debugging issues</a>	Automation Systems Engineer	Quality	Open

Page: 1 of 1

Use this portlet to view information about risks that belong to the selected project. You can customize the portlet to specify the columns of information you want to display, as well as the types of risks you want to appear.

- P6 R8.2: [Project Risks Portlet](#)
- P6 R8.1: [Project Risks Portlet](#)
- P6 R8.0: [Project Risks Portlet](#)



Communication Centre

The screenshot shows a window titled 'Communication Center' with a 'Send an e-mail' header. Below the header is a table with columns for 'Name', 'Office Phone', and 'Project association'. A tree view on the left shows a folder for 'Cordova - Plant Expansion & Modernization' which is expanded to show a list of resources. Each resource has a checkbox in the first column.

	Name	Office Phone	Project association
<input type="checkbox"/>	<b>Cordova - Plant Expansion &amp; Modernization</b>		
<input type="checkbox"/>	Automation Systems Engineer		Resource
<input type="checkbox"/>	Concrete Finisher		Resource
<input type="checkbox"/>	Design Engineer		Resource
<input type="checkbox"/>	Electrician		Resource
<input type="checkbox"/>	Elevator Installer		Resource
<input type="checkbox"/>	Excavator		Resource
<input type="checkbox"/>	Fabrication		Resource
<input type="checkbox"/>	Field Eng-Assistant		Resource

Use this portlet to share data and communicate with other P6 users who are associated with a project, including the project owner. All projects you are associated with are listed in the portlet; you can select to communicate with all of a project's team members or with members you select.

- P6 R8.2: [Communication Center Portlet](#)
- P6 R8.1: [Communication Center Portlet](#)
- P6 R8.0: [Communication Center Portlet](#)

Project Calendar

The screenshot shows a window titled 'Project Calendar' displaying a calendar for 'MAY 2012'. The calendar grid shows days from Sunday to Saturday. The week of May 27th to June 2nd is highlighted in blue. Below the calendar, there is a section for 'Activities' with two items: 'Conveyor System Complete' and 'Start-Up & Debug System'.

MAY 2012						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

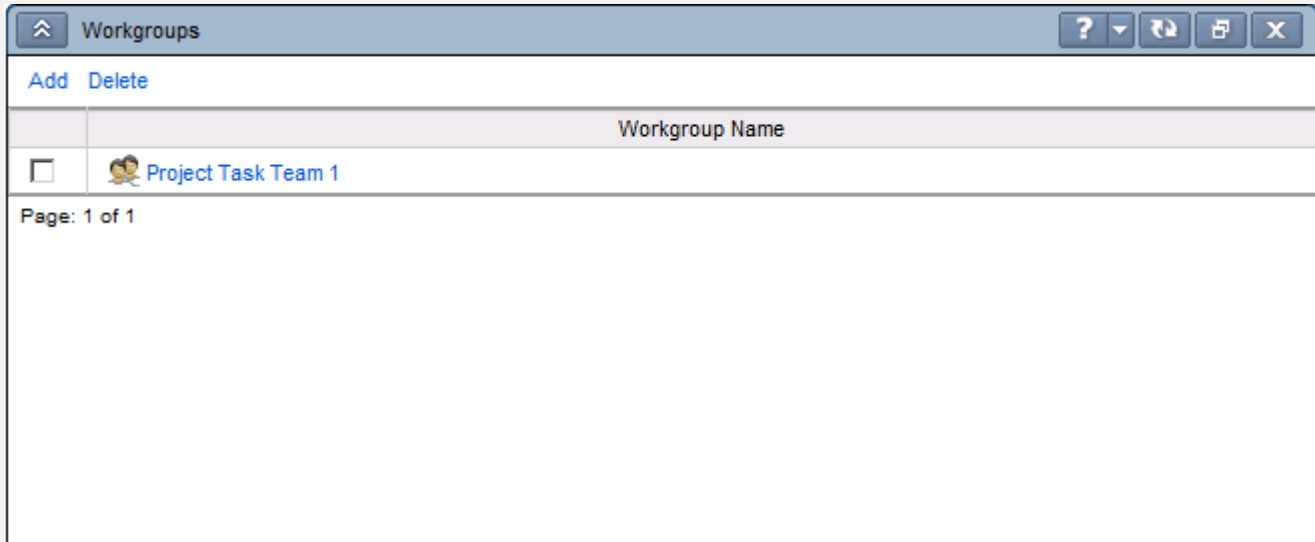
▼ Activities

- ◆ Conveyor System Complete
- Start-Up & Debug System

Use this portlet to view a week's worth of activities that pertain to your project. In a workspace, the Project Calendar portlet displays all activities scheduled for the selected week. Display the current week or click past or future dates to see the list of activities and milestones for the selected week. The selected week is highlighted in blue.

- P6 R8.2: [Project Calendar Portlet](#)
- P6 R8.1: [Project Calendar Portlet](#)
- P6 R8.0: [Project Calendar Portlet](#)

## Workgroups



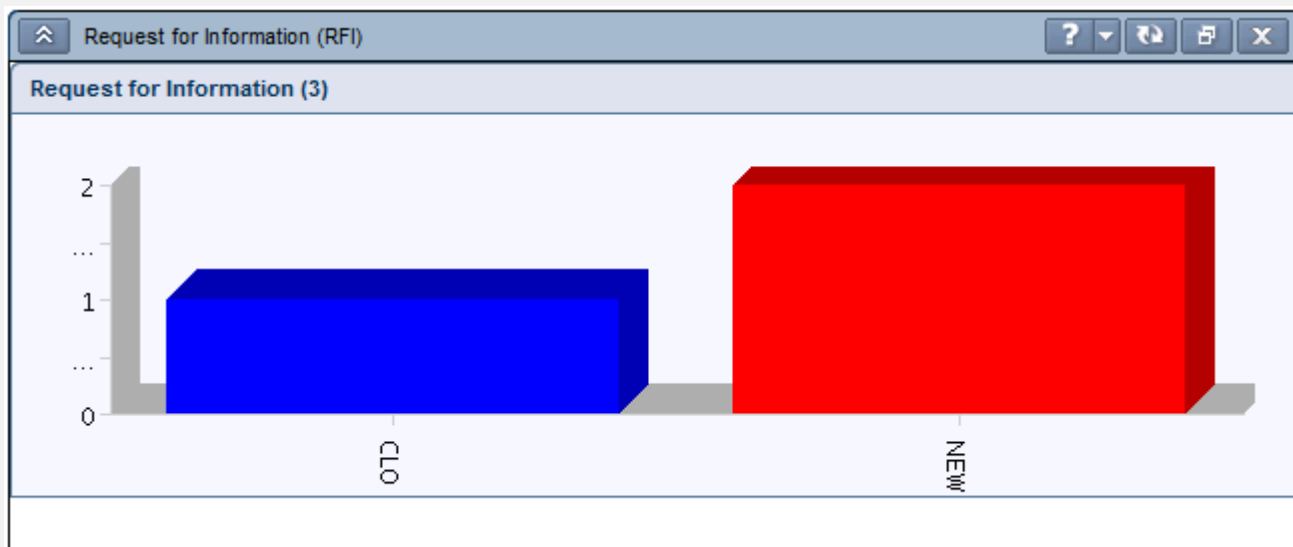
Use this portlet to view all of the workgroups you are associated with for that project. If you have the required project privileges, you can add or delete workgroups from the portlet.

- P6 R8.2: [Workgroups Portlet](#)
- P6 R8.1: [Workgroups Portlet](#)
- P6 R8.0: [Workgroups Portlet](#)

### Available portlets in a Workgroup:

1. [Activities Portlet of the Workgroup Workspace Page](#): Use this portlet to view, assign, and remove activities and milestones associated with the Workgroup. Your ability to assign and remove activities in the Activities portlet is dependent on your access rights to project data. If you have OBS access to the project, you can assign and remove any project activities. If you are a team member, you can only assign and remove activities to which you are assigned as a resource. If you are the project owner, you can assign and remove activities, provided you have OBS access to the project.
2. [Documents Portlet of the Workgroup Workspace Page](#): Use this portlet to view and access all documents that belong to the workgroup. You can view project documents that are related to activities assigned to the workgroup, as well as create and manage documents that only members of the workgroup can access and share. When a content repository is installed, the Documents portlet contains two tabs: Project and Workgroup.
3. [Issues Portlet of the Workgroup Workspace Page](#): Use this portlet to view information about issues that belong to the workgroup. The information that appears depends on the display format and customize options you select.

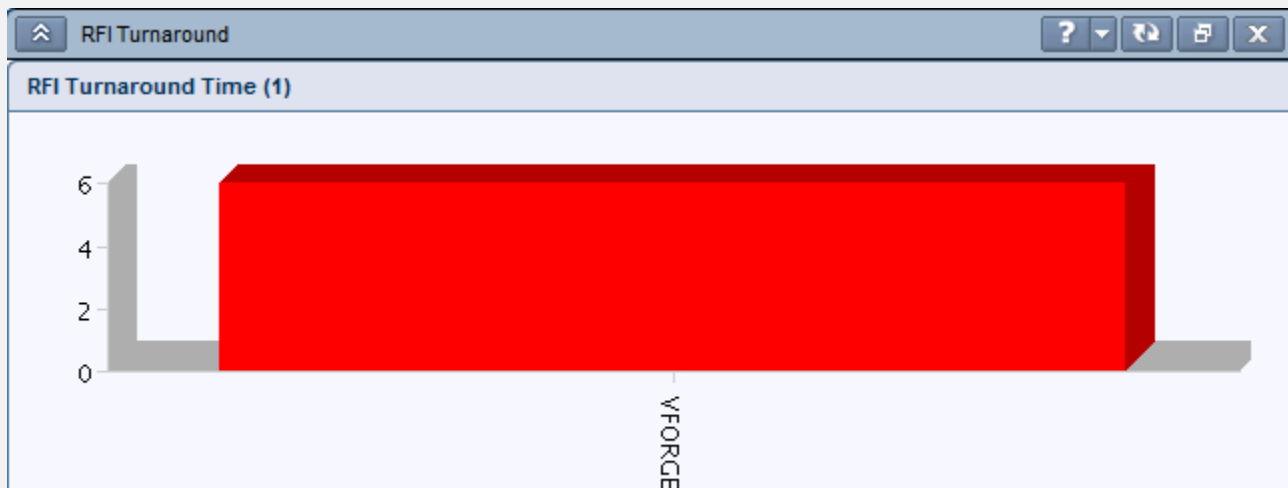
Request for Information



Use this portlet to view the number of requests for information (RFI) based on status that exist for the project in Contract Management. If you have a valid user name and password, you can additionally access Contract Management from this portlet to view a list of requests for a specific status. The number at the top of the portlet indicates the total number of project requests. If you have the required security privilege, you can customize the Project Workspace to specify how RFI information displays in the portlet. The customize options set for the portlet apply for all projects in the organization. Depending on these options, the status types that appear in the chart might include, CLO = Closed; OPN = Open; PRO = Proceed

- P6 R8.2: [Request for Information \(RFI\) Portlet](#)
- P6 R8.1: [Request for Information \(RFI\) Portlet](#)
- P6 R8.0: [Request for Information \(RFI\) Portlet](#)

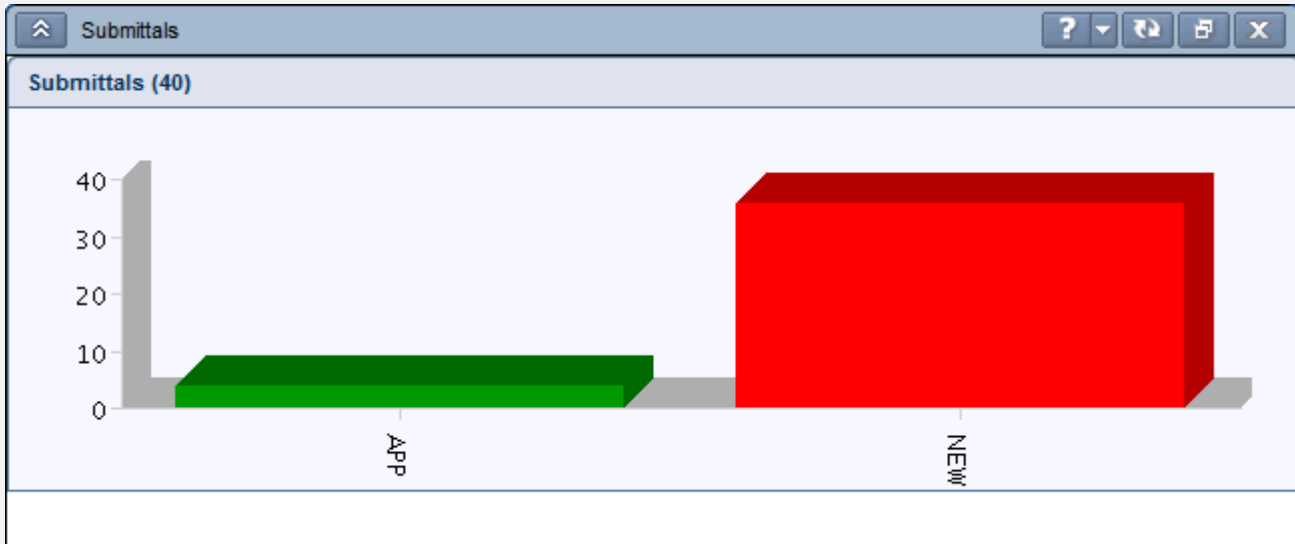
RFI Turnaround



Available only in environments integrating P6 with Contract Management, this portlet displays the average turnaround time for requests that exist for the project in Contract Management. The requests that appear depend on the customize options set for the portlet. If you have a valid user name and password for Contract Management, you can additionally access Contract Management from this portlet to view a list of requests for a specific grouping.

- P6 R8.2: [RFI Turnaround Portlet](#)
- P6 R8.1: [RFI Turnaround Portlet](#)
- P6 R8.0: [RFI Turnaround Portlet](#)

## Submittals



Available only in environments integrating P6 with Contract Management, this portlet displays the number of submittals based on status that exist for the project in Contract Management. If you have a valid user name and password, you can additionally access Contract Management from this portlet to view a list of submittals for a specific status. The number at the top of the portlet indicates the total number of project submittals.

If you have the required privilege, you can customize the Project Workspace to configure the way submittals information displays in the portlet. The customize options set for the portlet apply for all projects in the organization. Depending on these options, the status types that appear in the chart can include, NEW = New Item; APP = Approved; AAN = Approved as Noted.

- P6 R8.2: [Submittals Portlet](#)
- P6 R8.1: [Submittals Portlet](#)
- P6 R8.0: [Submittals Portlet](#)

### **Other PCM Portlets:**

1. [Contract Documents Portlet of the Workspace Page](#)
2. [Contract Issues Portlet of the Workspace Page](#)
3. [Contract Reports Portlet of the Workspace Page](#)
4. [Safety Portlet of the Workspace Page](#)

END