



P6 View and Reporting

Training Guide

Updated: March, 2010

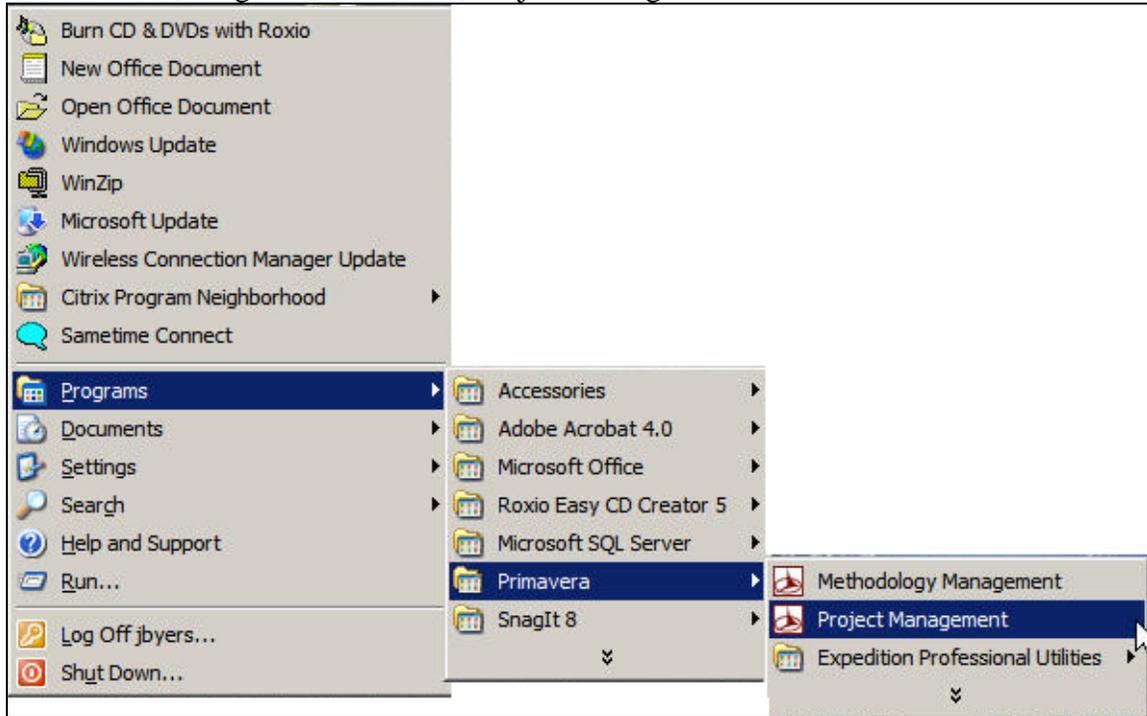
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Overview

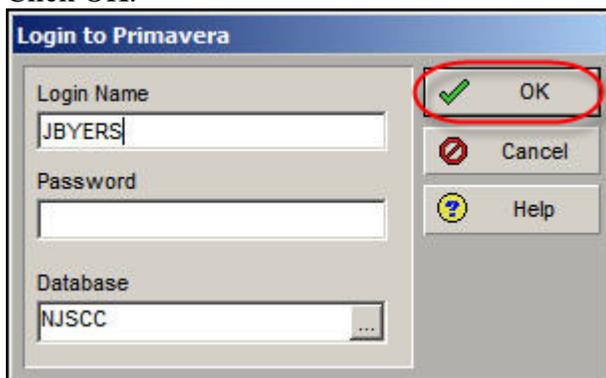
Logging in

1. Click Start, Programs, Primavera, Project Management:



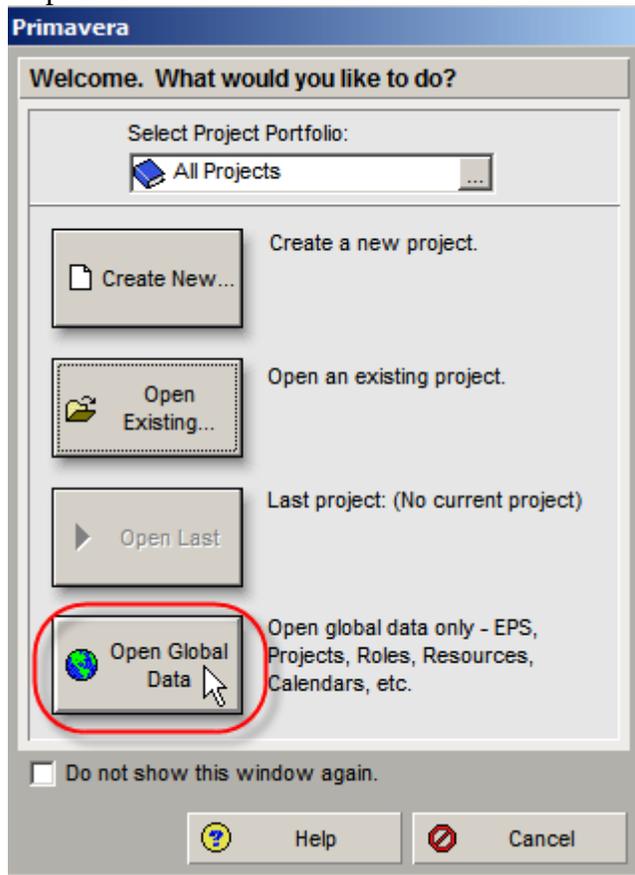
2. Enter your Login Name, leaving the Password field blank (for your initial login). Your login will be the first initial of your first name followed by your full last name. (Joe Smith would be JSMITH, Brenda Davis would be BDAVIS)

Click OK:



The Welcome Screen

The welcome screen will appear after you have successfully logged in to P6, click the “Open Global Data” button :



Create New—used to create a new project. This button will be disabled for most users, clicking on it will have no effect.

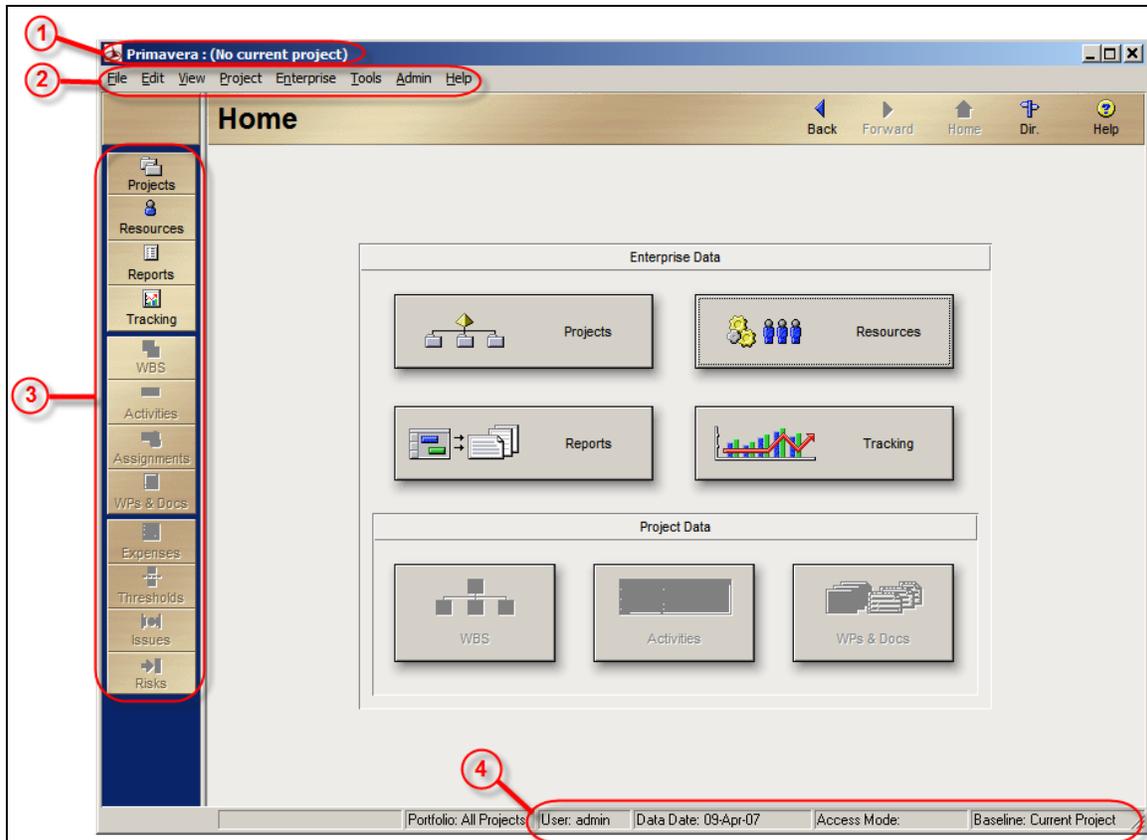
Open Existing—allows users to open existing projects that they have access to

Open Last—P6 stores the name of the last project(s) you have open when you close the program, to open the same project(s) click this button

Open Global Data—allows users to view global data, data which goes across the enterprise rather than being associated with one particular project

The Home Window

The Home window is a starting point for navigating through P6, and will be the screen you see upon choosing to “Open global data”:



1—Title Bar: Displays the name of open projects

2—Menu Bar: Performs functions in P6

3—Directory Bar: Switches between views in P6

4—Status Bar: Displays user’s login name, data date of open projects, access mode and current baseline

The Data Date of a project is the date through which update information is current

The Access Mode indicates which of the three states a project has been opened in:

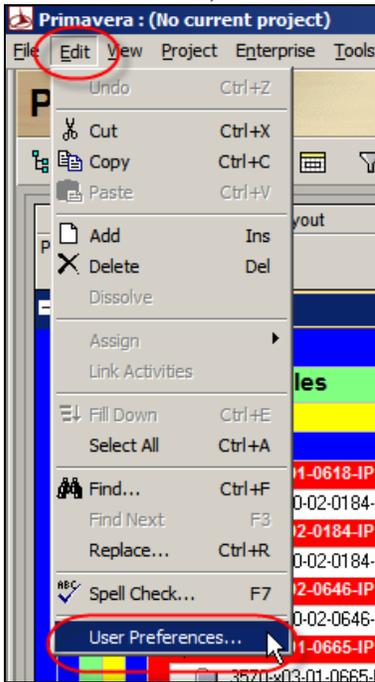
- Exclusive Mode-the project is only available to other users in Read Only mode when another user has it open in Exclusive Mode
- Shared Mode-other users are allowed to open and edit the project while it is open in this state
- Read Only Mode-no changes of any kind may be made to projects opened in this mode

Current Baseline is a snapshot of a project plan. This "snapshot" provides a target against which you can track a project's cost, schedule, and performance.

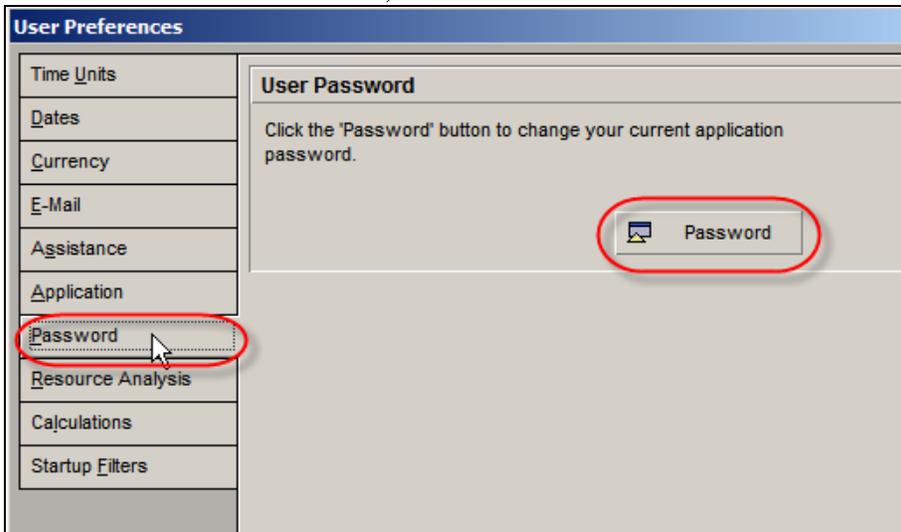
Set Your Password

Passwords are initially set to be blank, we recommend that all users set their passwords at the first login.

1. Choose Edit, User Preferences:



2. Click on the Password tab, then click the Password button:



3. Enter, then verify your new password, then click the OK button:



The image shows a 'Change Password' dialog box with a blue title bar. It contains two text input fields: 'Enter new password' and 'Verify your new password'. Both fields are filled with asterisks and are circled in red. To the right of the fields are three buttons: 'OK' (with a green checkmark icon), 'Cancel' (with a red 'X' icon), and 'Help' (with a yellow question mark icon). A mouse cursor is pointing at the 'OK' button.

Your new password will be effective the next time you log in.

The Enterprise Project Structure (EPS)

Projects in P6 are organized through the use of the Enterprise Project Structure (EPS), a hierarchical file system within which project schedules are stored.

Understanding the structure of the EPS is important because you will need to navigate through it to find the schedules that you wish to view.

Not all levels of the EPS will be visible to all users, what you see will depend upon the security profile you have been assigned.

The EPS consists of six levels:

EPS Level 1: NJSDA

Project ID	Project Name	Total Activities	Risk Level
◆ NJSDA	New Jersey School Developme...	7	Medium

EPS Level 2: School Projects

◆ NJSDA	New Jersey School Developme...
◆ Schools	School Projects

EPS Level 3: Schedule Phases

◆ NJSDA	New Jersey School Developme...
◆ Schools	School Projects
◆ Master Schedules	Master Project Schedules

The Initial Project Schedule will establish the first timeline for the project, but will not be updated as the project progresses. This schedule will be published into Expedition until the MPS is developed and approved.

The Master Project Schedule (MPS) will establish the detailed timeline for the project, information for each functional phase of the project will be solicited from the project team.

The original Master Project Schedule (MPS) schedule will be captured as a baseline for comparison prior to being updated. The Master Project Schedule will be published to Expedition for general viewing, and will represent the current approved schedule of the project.

The Project Progress Schedule (PPS) is a copy of the Master Project Schedule (MPS) which is stored in a separate EPS node. The PPS will be updated regularly with data coming from the Project Team, the team will have the ability to observe the effects of their updates on the PPS schedule and take corrective actions if necessary. When the PPS has been updated with actual data and necessary corrective actions have been taken, the PPS is used to update the MPS.

EPS Level 4: Regional Offices

[-] ◆ NJSDA	New Jersey School Developme...
[-] ◆ Schools	School Projects
[-] ◆ Master Schedules	Master Project Schedules
[-] ◆ NRO-MPS	Northern Regional Office
[-] ◆ TRO-MPS	Trenton Regional Office

EPS Level 5: School Districts (shown for Initial Projects only)

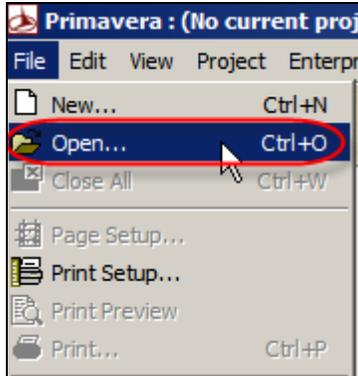
[-] ◆ NJSDA	New Jersey School Developme...
[-] ◆ Schools	School Projects
[-] ◆ Master Schedules	Master Project Schedules
[-] ◆ NRO-MPS	Northern Regional Office
[-] ◆ Clark-MPS	Clark
[-] ◆ East Orange-MPS	East Orange
[-] ◆ Elizabeth-MPS	Elizabeth
[-] ◆ Garfield-MPS-1	Garfield

EPS Level 6: Individual Schools (shown for Newark SD only)

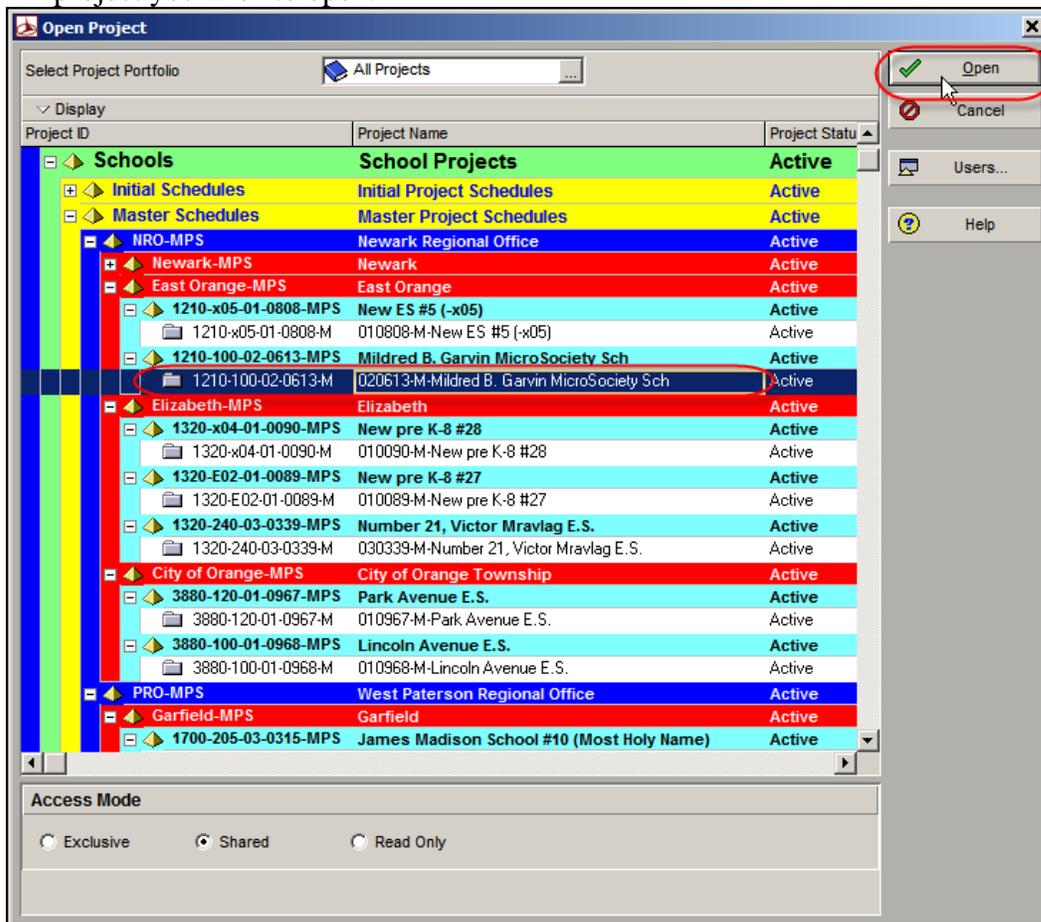
[-] ◆ NJSDA	New Jersey School Developme...
[-] ◆ Schools	School Projects
[-] ◆ Master Schedules	Master Project Schedules
[-] ◆ NRO-MPS	Northern Regional Office
[-] ◆ Clark-MPS	Clark
[-] ◆ East Orange-MPS	East Orange
[-] ◆ 1210-060-02-0296-MPS	East Orange - George Washington Carver Ins...
[-] ◆ 1210-060-02-0296-M	East Orange - George Washington Carver Institute E...

Opening Projects

1. In the File menu, click Open

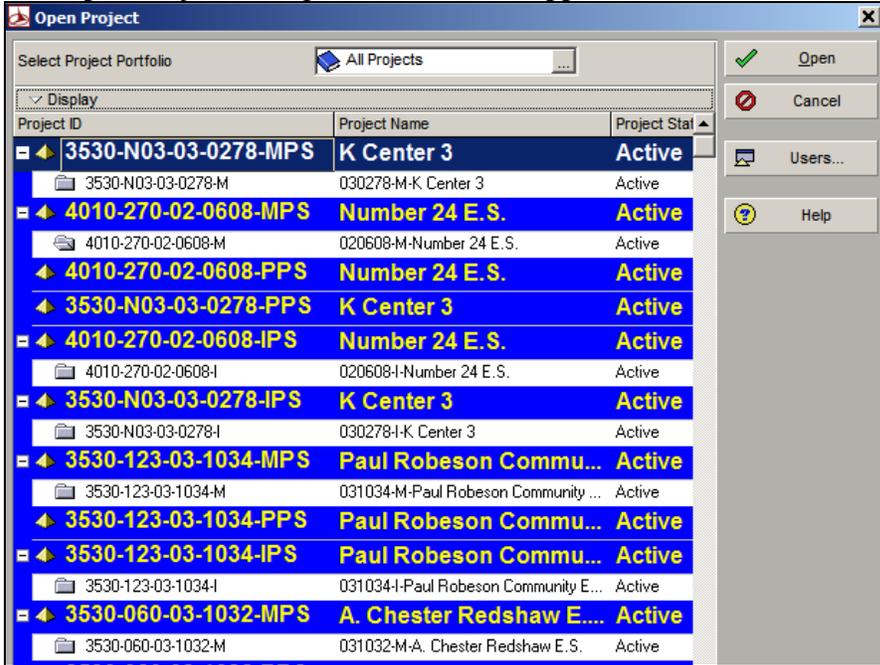


- The Open Project dialog box lists all the projects you have been assigned access to.
2. Navigate through the Enterprise Project Structure (EPS) to find the EPS node or project you wish to open:



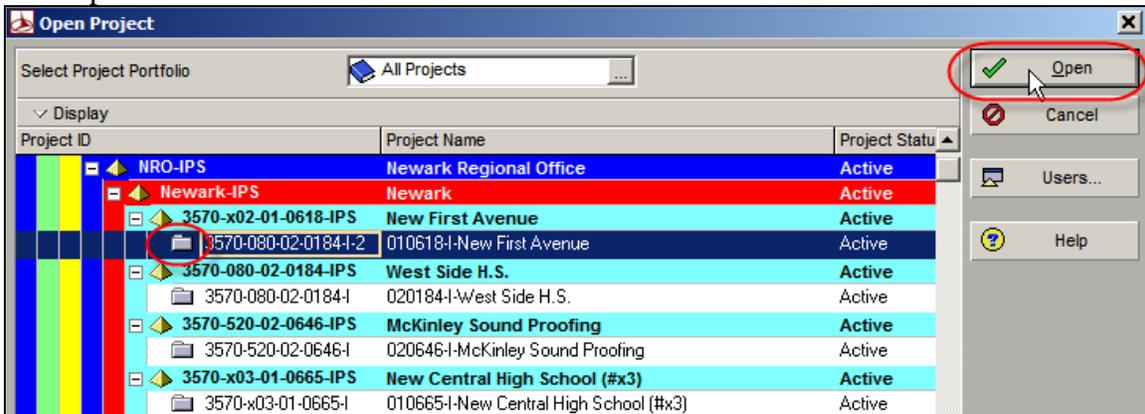
Most users do not have administrative access to all projects, unless you have access to all projects, you will only see the EPS nodes that you have been assigned access to.

The Open Project dialogue box will look approximatel like this for most users:



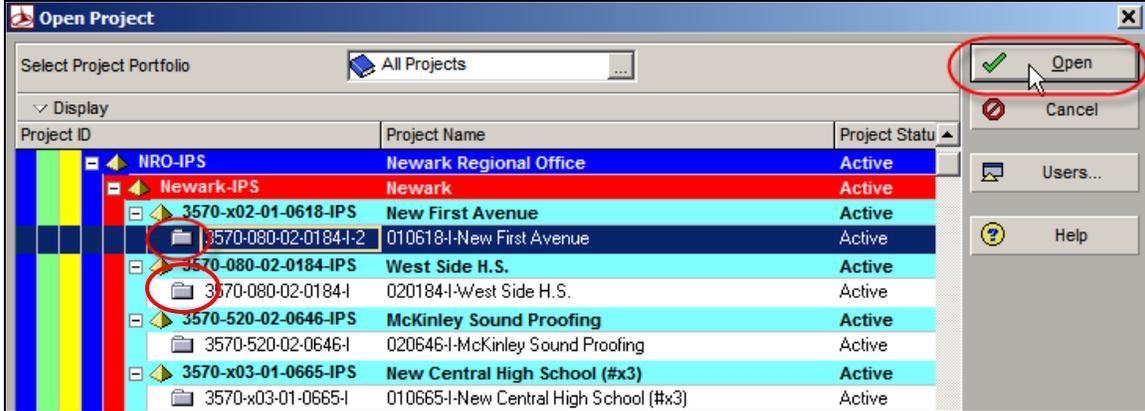
Open a Single Project

Single projects are represented by the folder icon (), you can select one project and click open:



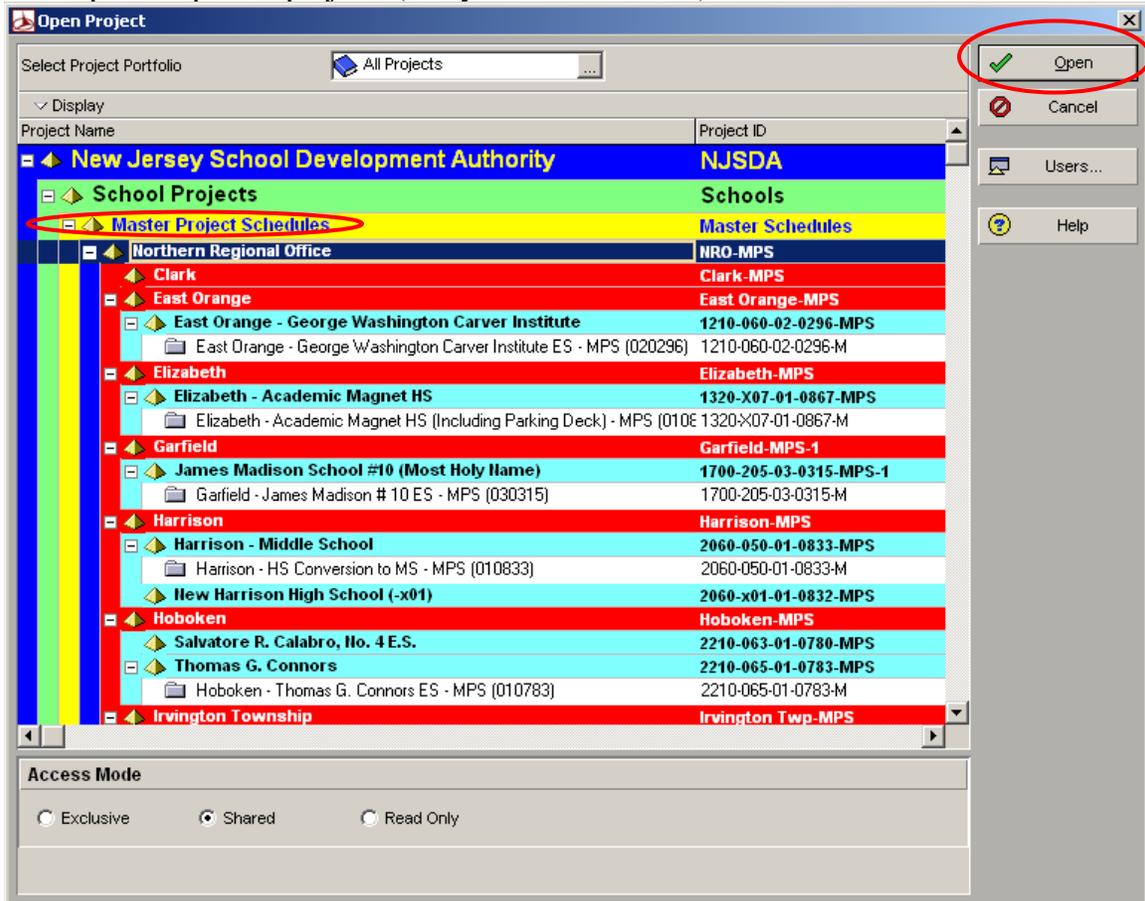
Open Multiple Projects

You can also use Ctrl+click or Shift+click to highlight multiple projects before clicking Open:

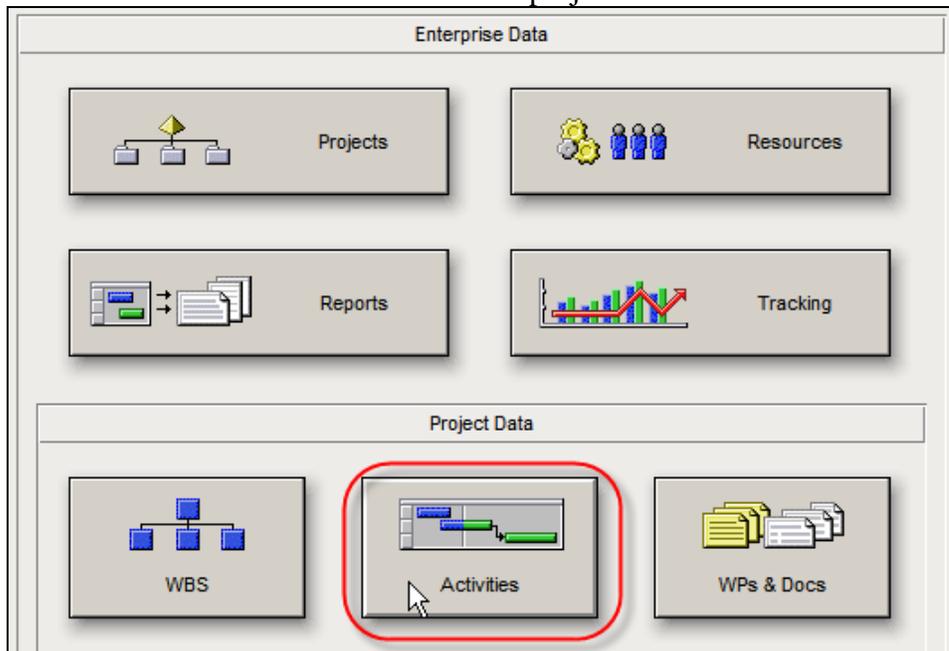


Open an Entire EPS node

EPS nodes are represented by the pyramid icon (🏔️), you can select an EPS node and click open to open all projects (that you have access to) within that node:

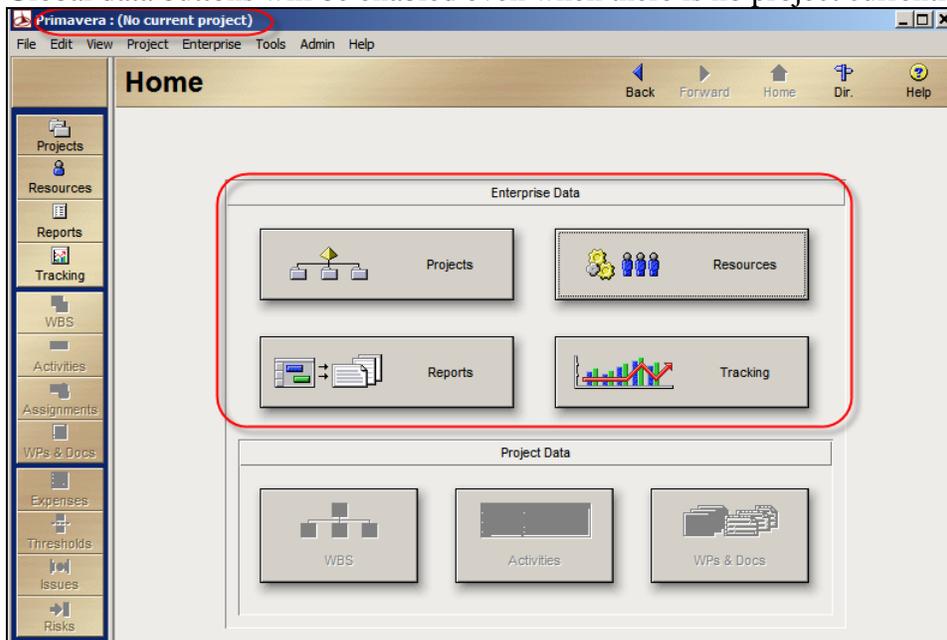


3. Click the “Activities” button to view the project in detail:

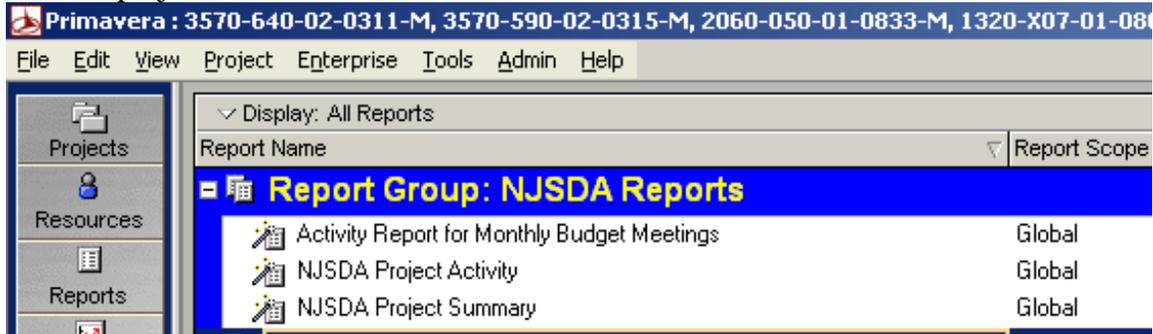


The buttons on the home screen are grouped into two categories, Global Data and Project Data.

Global data buttons will be enabled even when there is no project currently open:

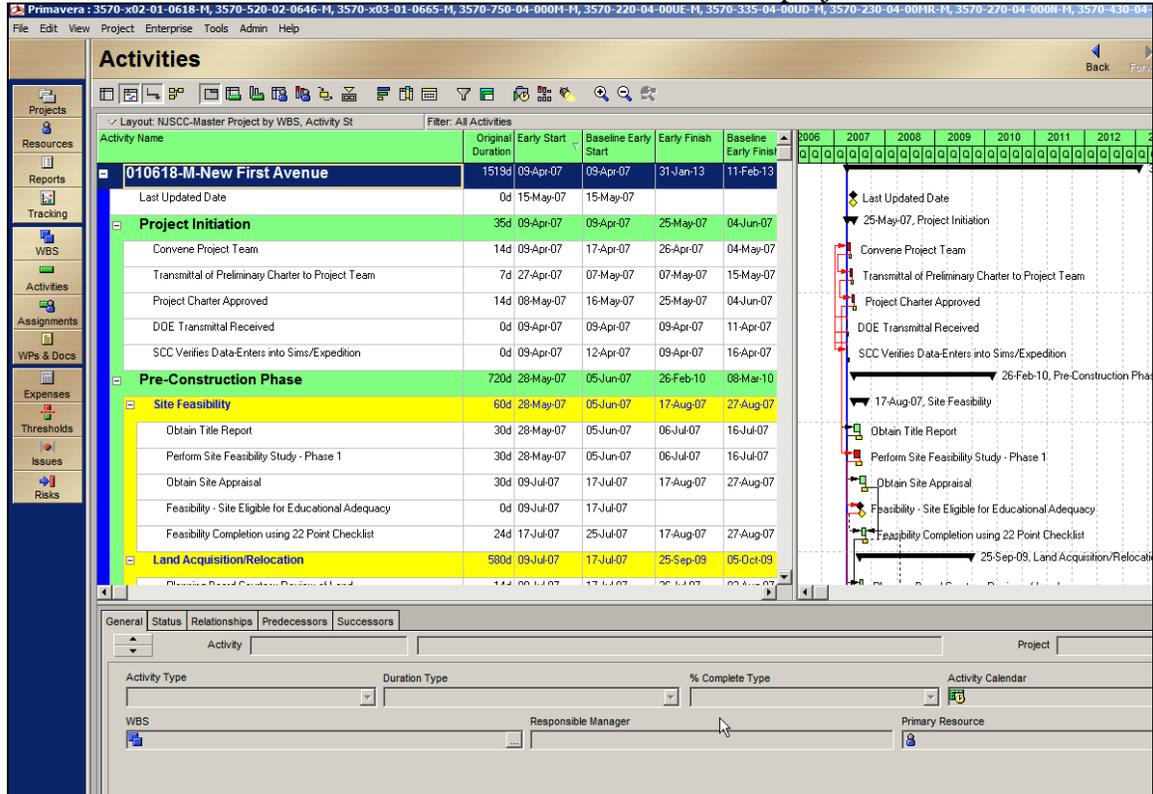


Reports—takes users to a display of all “Global” reports, reports which run across all or selected projects:



The Activities Window

The activities window is where detailed information about a project is viewed:



The buttons on the left hand side of the Activities Window are collectively referred to as the Directory bar, and may be used to navigate quickly from one screen to another.

Note-the Resources, Tracking, Assignments, WP’s&Docs, Expenses and Risks buttons deal with functionality which is not being implemented at this time.

The Activity Table displays activity information in a tabular format:

Activity Name	Original Duration	Early Start	Baseline Early Start	Early Finish	Baseline Early Finish
010618-M-New First Avenue	1519d	09-Apr-07	09-Apr-07	31-Jan-13	11-Feb-13
Last Updated Date	0d	15-May-07	15-May-07		
Project Initiation	35d	09-Apr-07	09-Apr-07	25-May-07	04-Jun-07
Convene Project Team	14d	09-Apr-07	17-Apr-07	26-Apr-07	04-May-07
Transmittal of Preliminary Charter to Project Team	7d	27-Apr-07	07-May-07	07-May-07	15-May-07
Project Charter Approved	14d	08-May-07	16-May-07	25-May-07	04-Jun-07
DOE Transmittal Received	0d	09-Apr-07	09-Apr-07	09-Apr-07	11-Apr-07
SCC Verifies Data-Enters into Sims/Expedition	0d	09-Apr-07	12-Apr-07	09-Apr-07	16-Apr-07
Pre-Construction Phase	720d	28-May-07	05-Jun-07	26-Feb-10	08-Mar-10
Site Feasibility	60d	28-May-07	05-Jun-07	17-Aug-07	27-Aug-07
Obtain Title Report	30d	28-May-07	05-Jun-07	06-Jul-07	16-Jul-07
Perform Site Feasibility Study - Phase 1	30d	28-May-07	05-Jun-07	06-Jul-07	16-Jul-07
Obtain Site Appraisal	30d	09-Jul-07	17-Jul-07	17-Aug-07	27-Aug-07
Feasibility - Site Eligible for Educational Adequacy	0d	09-Jul-07	17-Jul-07		
Feasibility Completion using 22 Point Checklist	24d	17-Jul-07	25-Jul-07	17-Aug-07	27-Aug-07
Land Acquisition/Relocation	580d	09-Jul-07	17-Jul-07	25-Sep-09	05-Oct-09
Planning Board/County Review of Land	14d	09-Jul-07	17-Jul-07	26-Jul-07	09-Aug-07

Activity ID-a short ID which uniquely identifies the activity within the project

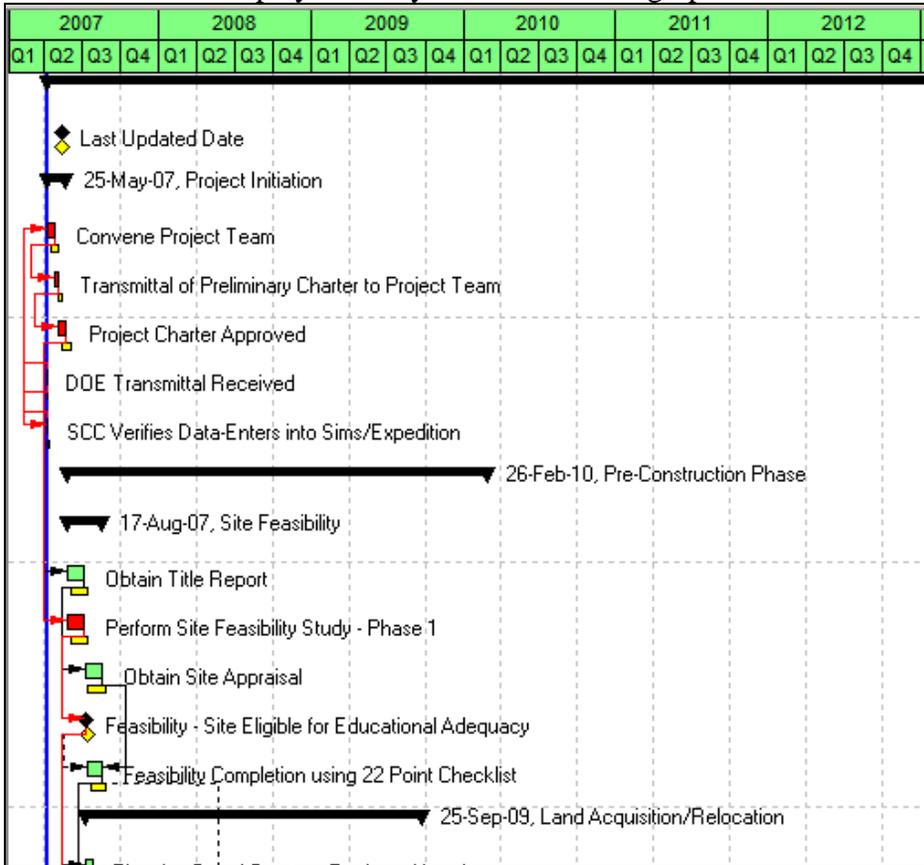
Activity Name-the actual name of the activity, names do not have to be unique

Original Duration-the total working time from the activity's planned start date to the activity's planned finish date

Early Start-the earliest possible time that the remaining work for the activity can begin. The Early Start date is calculated by the project scheduler based on network logic (relationships) and schedule constraints.

The Early Finish- The earliest possible date that an activity can finish, calculated by the project scheduler based on network logic (relationships) and schedule constraints.

The Gantt Chart displays activity information in a graphic format:



Red Bars represent critical activities, the delay of these activities will delay the end date of the project.

Green Bars represent remaining work to be completed on an activity. If the activity is not started and does not fall on the critical path the entire bar will be displayed as green.

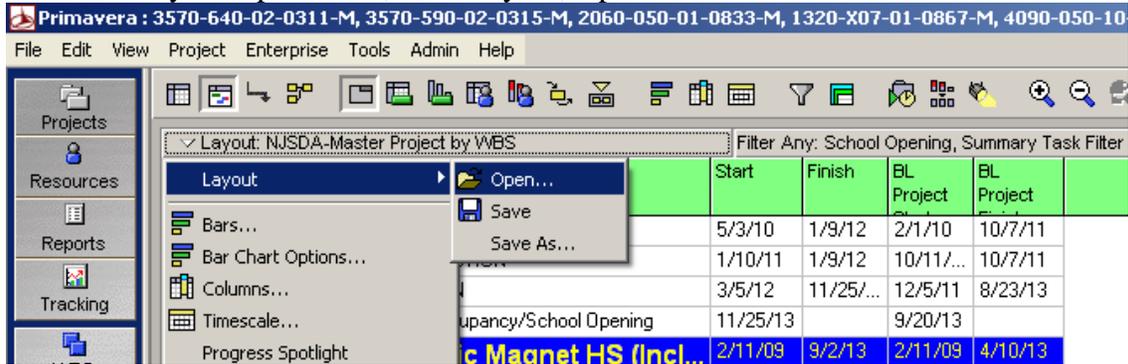
Yellow Bars represent baseline data, the dates that the activities were originally scheduled to start and finish at the time that the schedule was created.

Black Bars represent summary information. Summary bars are displayed for the overall project, and for each WBS grouping.

Choosing from the preformatted Activity Window Layouts

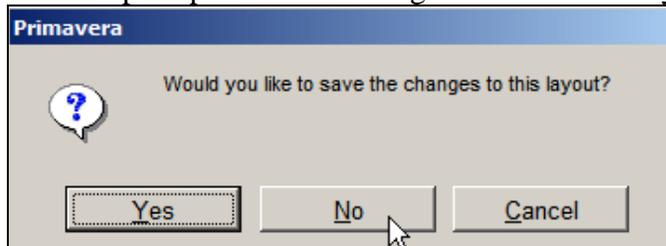
NJSDA Master Project by Work Breakdown Structure

1. In the Layout Options bar, click Layout, Open:

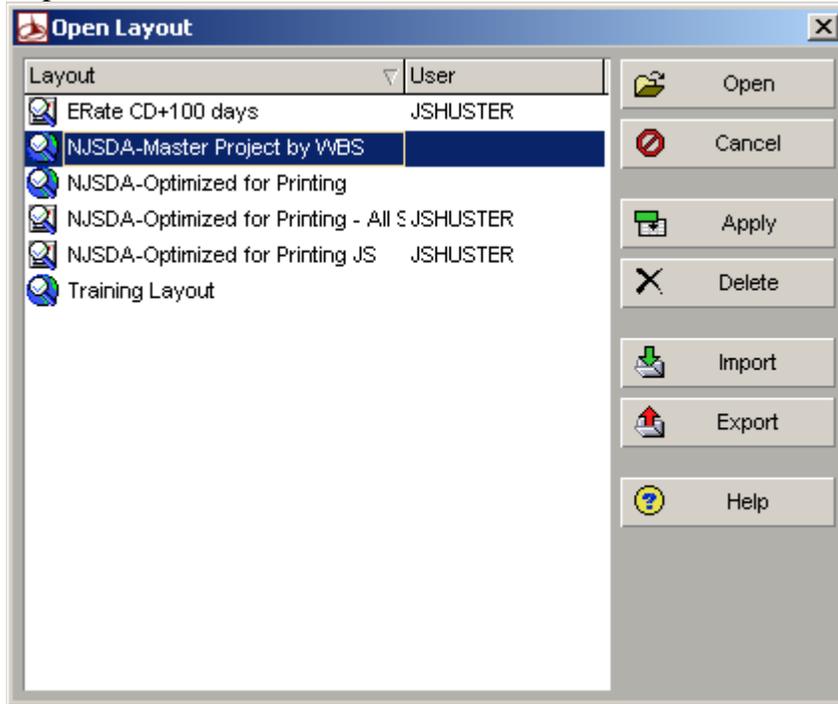


If you have made any modifications to the current layout, you will be prompted to save those changes. In most cases, you will choose No

2. When prompted to save changes to the current layout, click No.



3. Select a layout to apply to the project, NJSDA-Master Project by WBS, then click the “Open” button:



The Work Breakdown Structure (WBS) groups activities into their corresponding phases of the project lifecycle as shown:



In the NJSDA-Master Project by WBS layout, activities are grouped underneath the WBS nodes that they are associated with and sorted from top to bottom by order of early start:

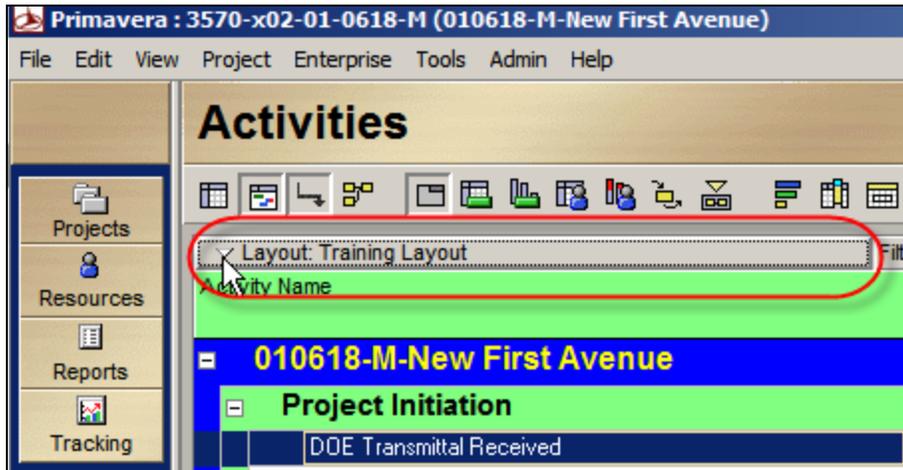
Activity Name	Original Duration	Early Start	Baseline Start
010618-M-New First Avenue	1519d	09-Apr-07	09-Apr-07
Last Updated Date	0d	15-May-07	15-May-07
Project Initiation	35d	09-Apr-07	09-Apr-07
DOE Transmittal Received	0d	09-Apr-07	09-Apr-07
SCC Verifies Data-Enters into Sims/Expedition	0d	09-Apr-07	12-Apr-07
Convene Project Team	14d	09-Apr-07	17-Apr-07
Transmittal of Preliminary Charter to Project Team	7d	27-Apr-07	07-May-07
Project Charter Approved	14d	08-May-07	16-May-07
Pre-Construction Phase	720d	28-May-07	05-Jun-07
Site Feasibility	60d	28-May-07	05-Jun-07
Obtain Title Report	30d	28-May-07	05-Jun-07
Perform Site Feasibility Study - Phase 1	30d	28-May-07	05-Jun-07
Obtain Site Appraisal	30d	09-Jul-07	17-Jul-07
Feasibility - Site Eligible for Educational Adequacy	0d	09-Jul-07	17-Jul-07
Feasibility Completion using 22 Point Checklist	24d	17-Jul-07	25-Jul-07
Land Acquisition/Relocation	580d	09-Jul-07	17-Jul-07
Planning Board Courtesy Review of Land	14d	09-Jul-07	17-Jul-07
DOE Approval of Site	35d	20-Aug-07	28-Aug-07
SCC Board Approval to Purchase Site	90d	20-Aug-07	28-Aug-07
Land Acquisition Process	400d	24-Dec-07	01-Jan-08
Physical Relocation	400d	17-Mar-08	25-Mar-08
Land Acquisition/Relocation Complete	0d		
Demolition/Abatement/Remediation	450d	09-Jun-08	17-Jun-08
Demolition / Utility Cut-Off / Asbestos Abatement	300d	09-Jun-08	17-Jun-08
Pre-Construction Remediation	300d	09-Jun-08	17-Jun-08
Remediation/DEP - Environmental Reviews	150d	03-Aug-09	11-Aug-09
Approval of Remediation Action Work Plan (RAWP) by DEP	0d		
Design	645d	09-Jul-07	17-Jul-07
Procurement of Architect/Engineer	120d	09-Jul-07	17-Jul-07

Modifying Layouts

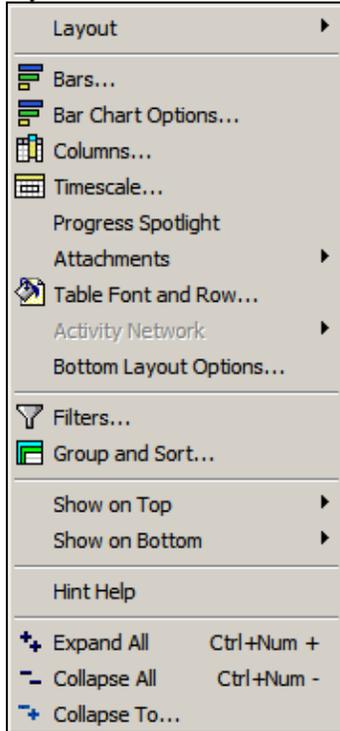
Users cannot rename existing layouts, but can create and save layouts which will be visible only to you.

By creating activity layouts, you can easily view data specific to your needs. Saving layouts for future use allows you to quickly retrieve information.

The Layout Options bar is a centralized menu for layout customization click on it to see the menu:



Clicking on the Layout Bar will bring up a menu of items that you can change in your layout:



The following is a list of layout elements that are customizable:

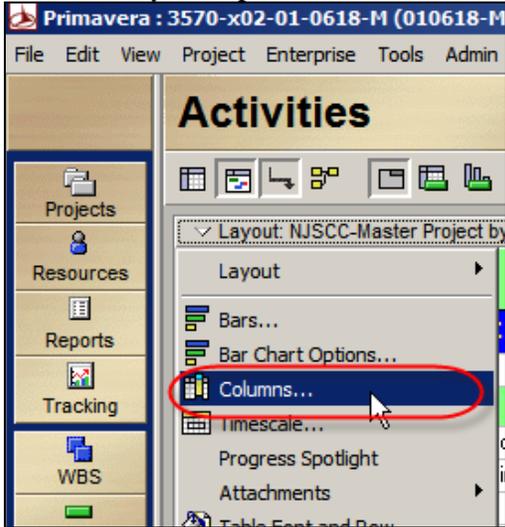
- Bars
- Columns
- Timescale
- Table font and colors
- Row height
- Filters
- Activity grouping and sorting
- Top/bottom layouts

A few changes that many users choose to make to their layouts are described below.

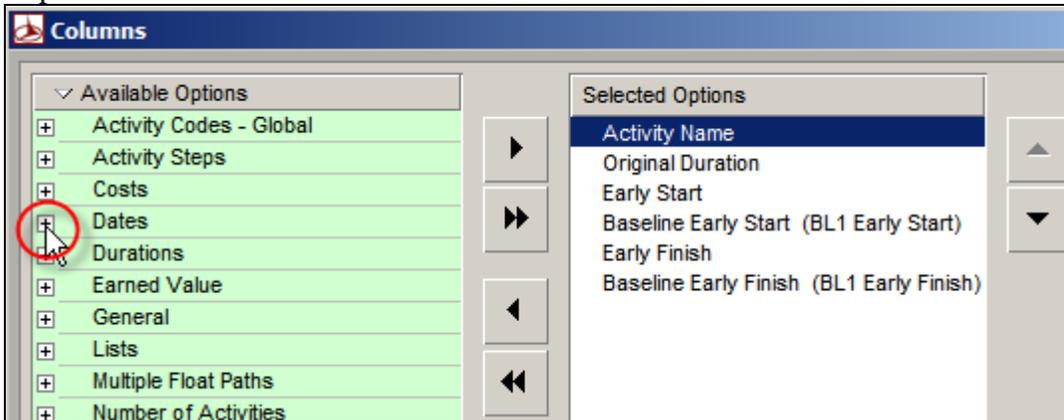
Columns

You can select columns to display in the Activity Table, as well as the order in which they appear from left to right:

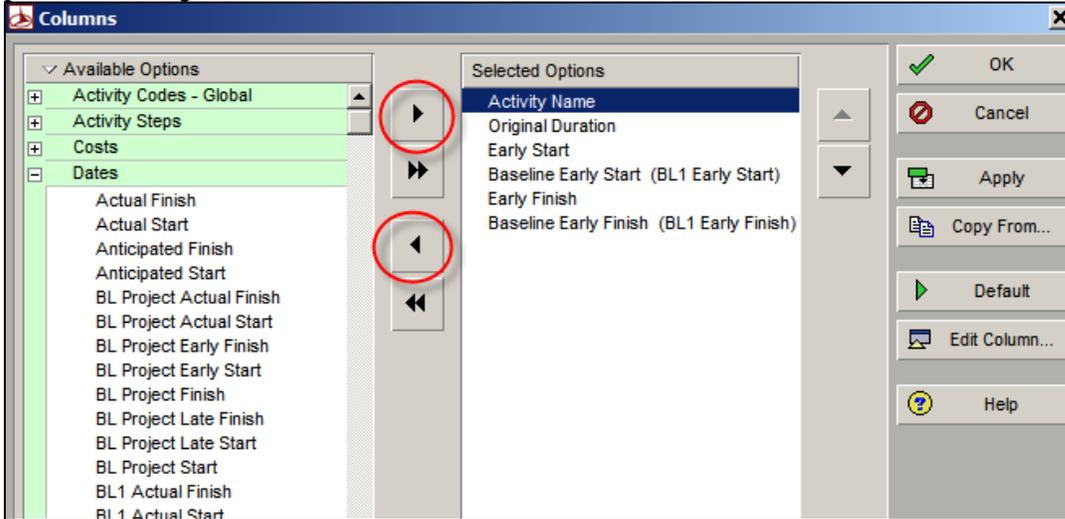
1. In the Layout Options bar, click Columns:



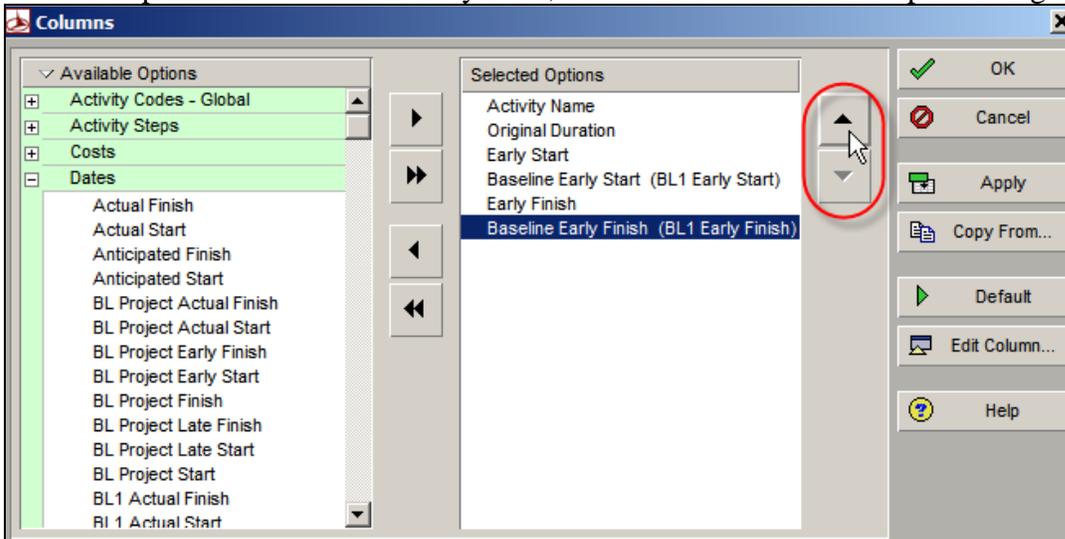
2. Click the “+” icon for the headings on the Available Options pane on the left to Expand them:



3. Use single arrows to move highlighted data items into or out of the Selected Options pane on the right:



4. Use navigation arrows to configure the order of the columns, items at the top of the list show up to the left on the activity table, items at the bottom show up to the right:



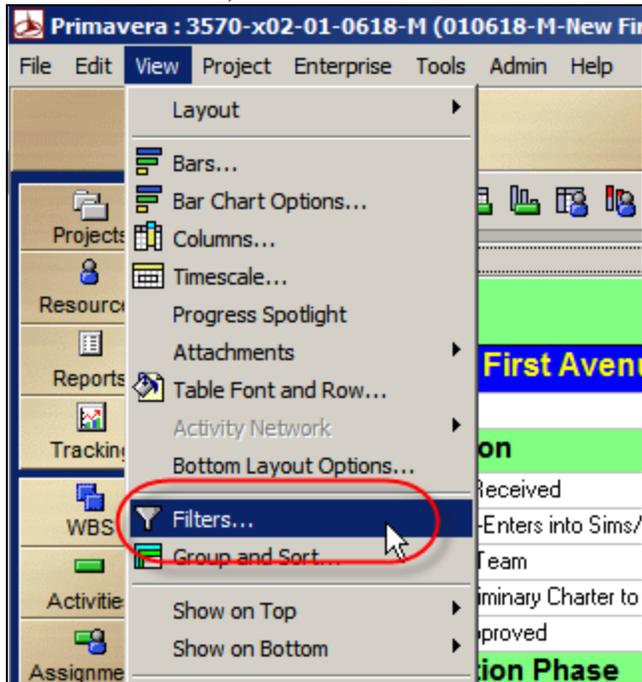
Preformatted Filters

Users cannot delete or modify the existing global filters, but can create their own filters and can save them as desired. Preformatted activity filters include:

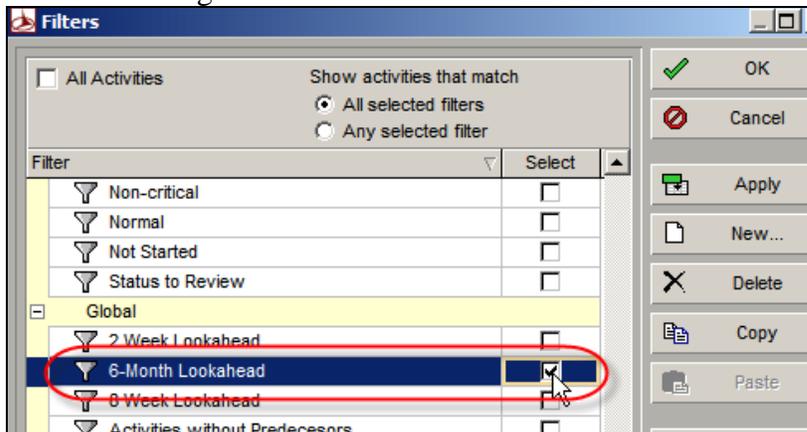
- Completed
- Critical
- Has Finish Constraint
- Has Start Constraint
- In Progress
- Level of Effort
- Longest Path
- Milestone
- Negative Float
- New Feedback to Review
- Non What-If
- Non-critical
- Normal
- Not Started
- Status to Review
- 2 Week Lookahead
- 6-Month Lookahead
- 8 Week Lookahead
- Activities without Predecessors
- Activities without Successors
- Non Milestones without Pred/Succ
- Non-WBS Summary Activities
- Not Completed
- notes
- WBS Summary Activities
- Zero Duration Activities

Apply a Preformatted Filter:

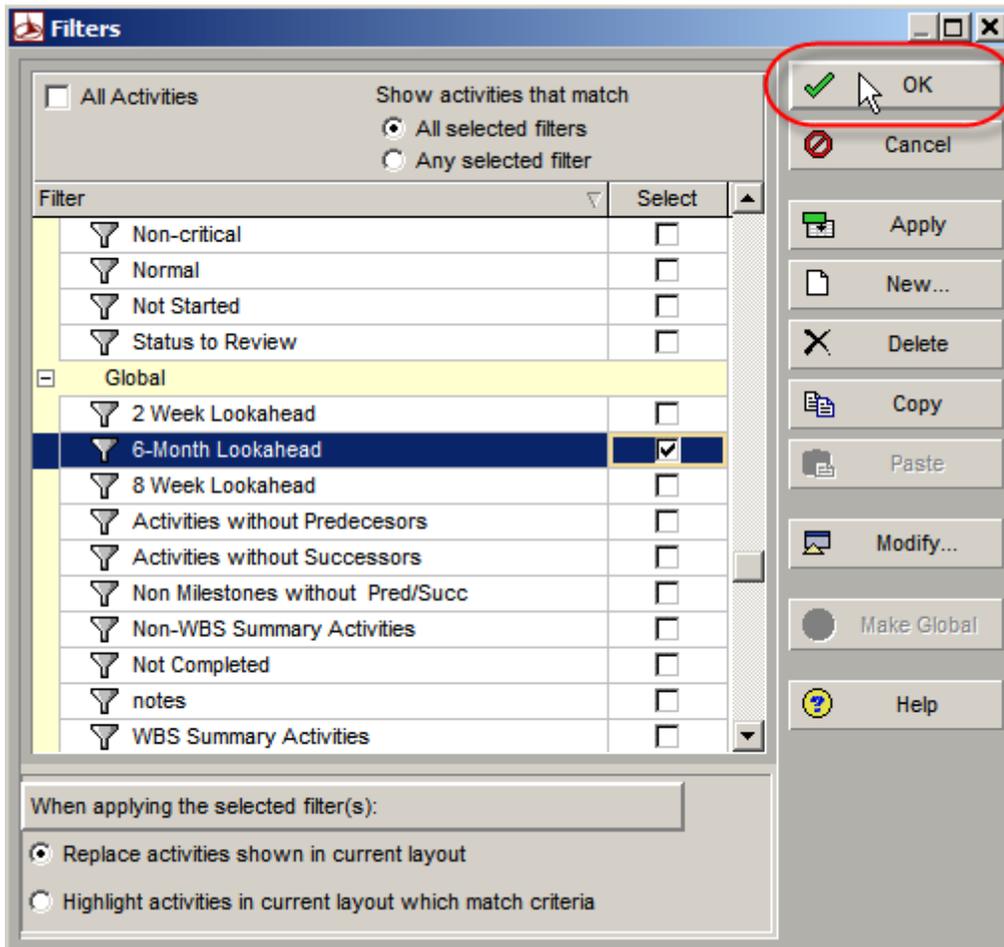
1. Choose View, Filters



2. Scroll through the list and select the “6-Month Lookahead:

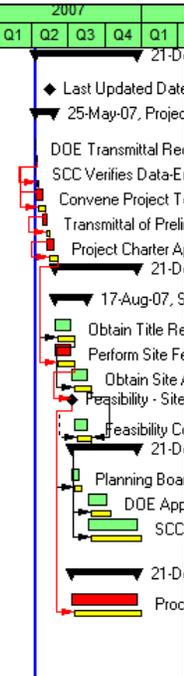


3. Click the OK button:

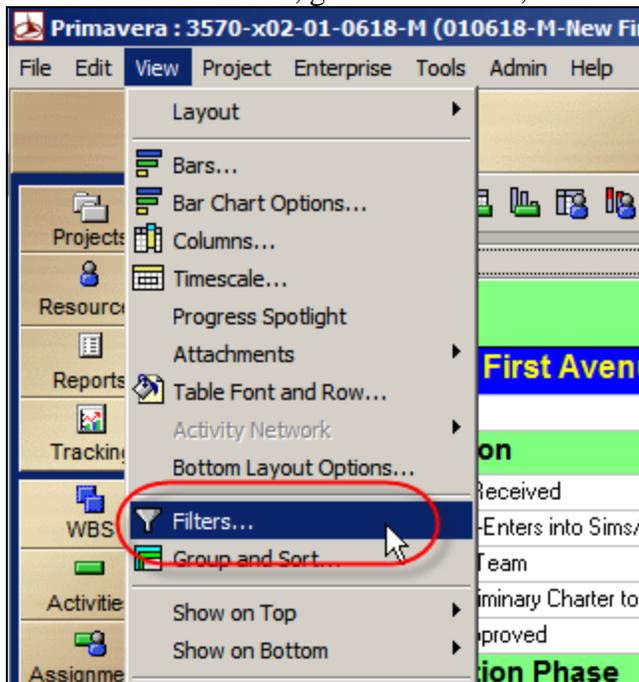


4. Only activities that meet the filter criteria (Early start within the next 6 months) are displayed:

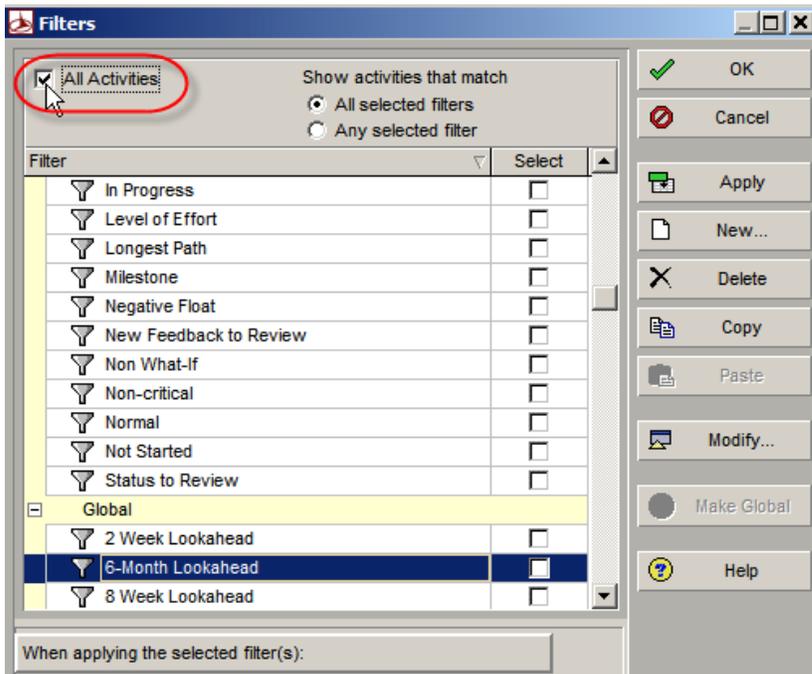
Activity Name	Original Duration	Early Start	Baseline Early Start	Early Finish	Baseline Early Finish	2007				
						Q1	Q2	Q3	Q4	Q1
010618-M-New First Avenue	185d	09-Apr-07	09-Apr-07	21-Dec-07	31-Dec-07					
Last Updated Date	0d	15-May-07	15-May-07							
Project Initiation	35d	09-Apr-07	09-Apr-07	25-May-07	04-Jun-07					
DOE Transmittal Received	0d	09-Apr-07	09-Apr-07	09-Apr-07	11-Apr-07					
SCC Verifies Data-Enters into Sims/Expedition	0d	09-Apr-07	12-Apr-07	09-Apr-07	16-Apr-07					
Convene Project Team	14d	09-Apr-07	17-Apr-07	26-Apr-07	04-May-07					
Transmittal of Preliminary Charter to Project Team	7d	27-Apr-07	07-May-07	07-May-07	15-May-07					
Project Charter Approved	14d	08-May-07	16-May-07	25-May-07	04-Jun-07					
Pre-Construction Phase	150d	28-May-07	05-Jun-07	21-Dec-07	31-Dec-07					
Site Feasibility	60d	28-May-07	05-Jun-07	17-Aug-07	27-Aug-07					
Obtain Title Report	30d	28-May-07	05-Jun-07	06-Jul-07	16-Jul-07					
Perform Site Feasibility Study - Phase 1	30d	28-May-07	05-Jun-07	06-Jul-07	16-Jul-07					
Obtain Site Appraisal	30d	09-Jul-07	17-Jul-07	17-Aug-07	27-Aug-07					
Feasibility - Site Eligible for Educational Adequacy	0d	09-Jul-07	17-Jul-07							
Feasibility Completion using 22 Point Checklist	24d	17-Jul-07	25-Jul-07	17-Aug-07	27-Aug-07					
Land Acquisition/Relocation	120d	09-Jul-07	17-Jul-07	21-Dec-07	31-Dec-07					
Planning Board Courtesy Review of Land	14d	09-Jul-07	17-Jul-07	26-Jul-07	03-Aug-07					
DOE Approval of Site	35d	20-Aug-07	28-Aug-07	05-Oct-07	15-Oct-07					
SCC Board Approval to Purchase Site	90d	20-Aug-07	28-Aug-07	21-Dec-07	31-Dec-07					
Demolition/Abatement/Remediation	0d									
Design	120d	09-Jul-07	17-Jul-07	21-Dec-07	31-Dec-07					
Procurement of Architect/Engineer	120d	09-Jul-07	17-Jul-07	21-Dec-07	31-Dec-07					
Construction	0d									
Post-Occupancy	0d									



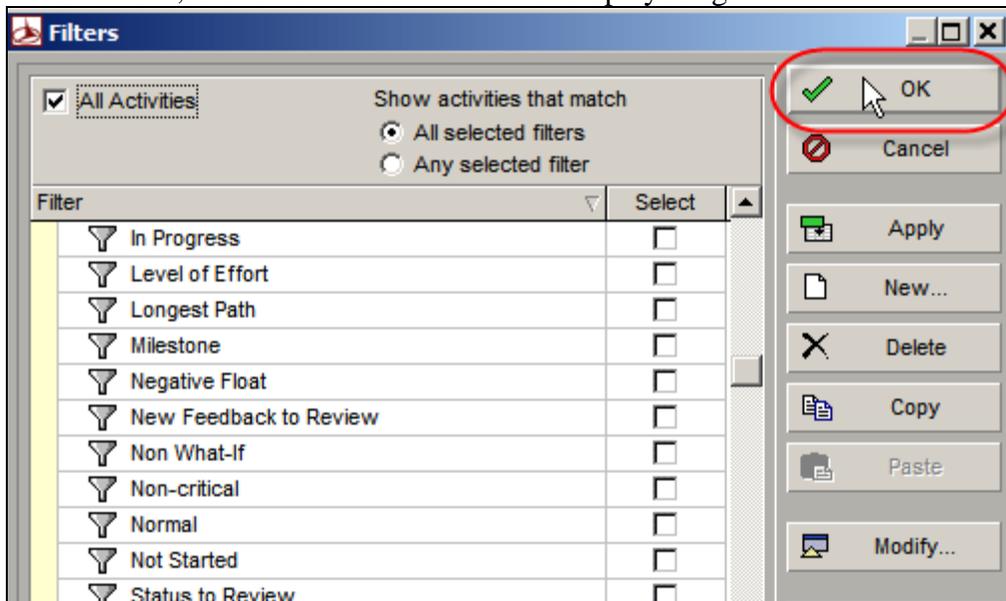
5. To turn the filter off, go back to View, Filters:



6. Put a check in the “All Activities” box in the upper right corner of the Filters dialogue box:

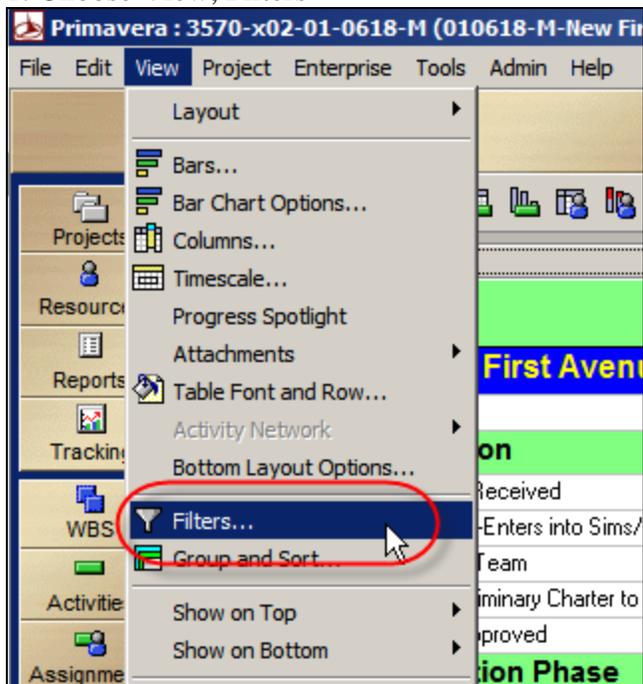


7. Click OK, and all activities will now be displayed again:

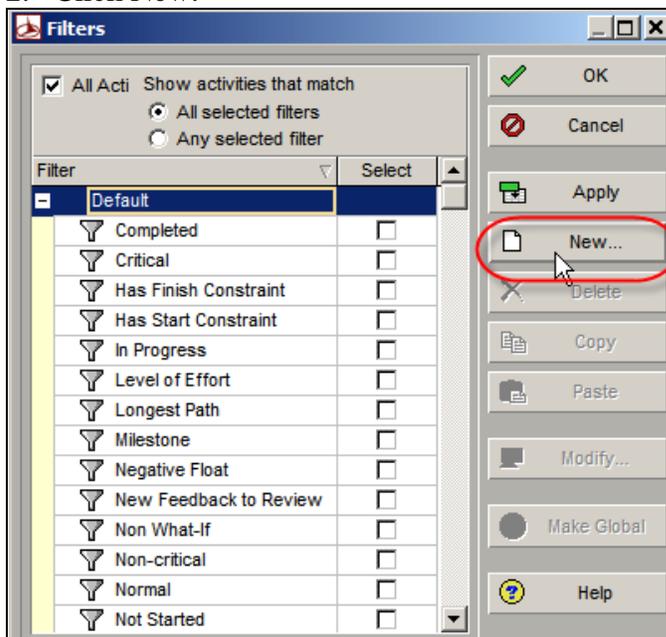


Create a new filter

1. Choose View, Filters



2. Click New:



3. Type a filter name (Training Filter):

The screenshot shows the 'Filter' dialog box. The 'Filter Name' field contains the text 'Training Filter', which is circled in red. Below this field, there is a section titled 'Display: Filter' with a dropdown arrow. Underneath, there is a table with columns: 'Display all rows', 'Parameter', 'Is', and 'Value'. A row is visible with a dropdown arrow in the 'Where' column and the text '(All of the following)' in the 'Value' column.

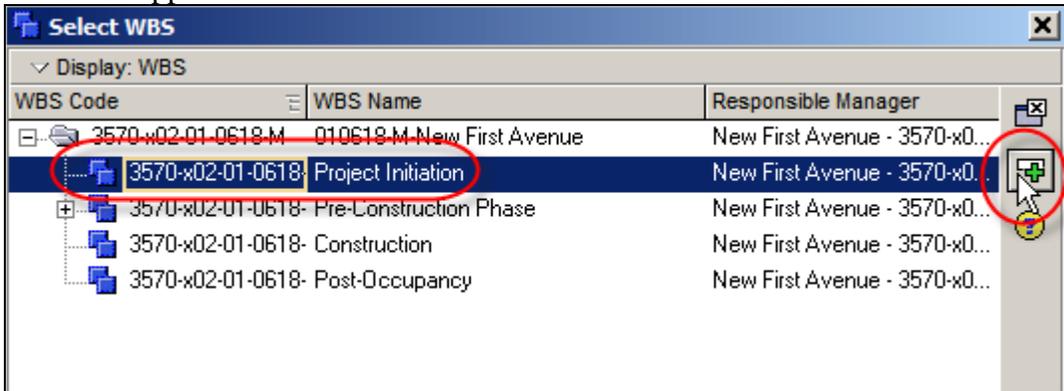
4. Click the "Parameter" field, scroll through the list and select WBS:

The screenshot shows the 'Filter' dialog box with the 'Parameter' dropdown menu open. The 'WBS' option is highlighted and circled in red. The dropdown menu lists several options: 'Variance - BL1 Total C', 'Variance At Completio', 'Variance At Completio', 'WBS', 'WBS Name', 'WBS Path', 'Win Confidence', and 'Work Products and Do'.

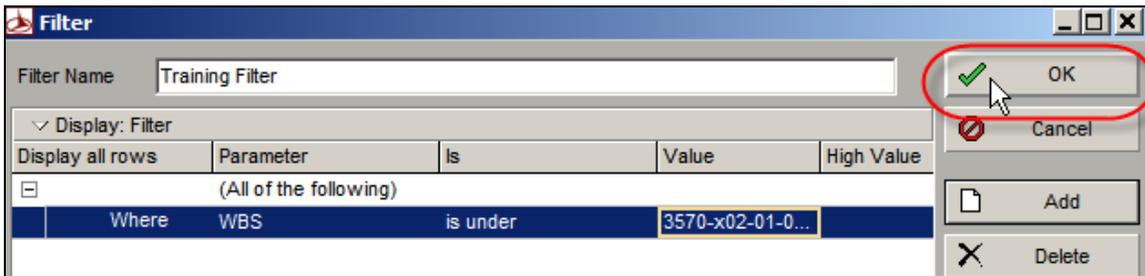
5. Double-click the "Is" field to select a filtering criteria, choose "Is Under":

The screenshot shows the 'Filter' dialog box with the 'Is' field dropdown menu open. The 'is under' option is highlighted and circled in red. The dropdown menu lists several options: 'is under', 'equals', 'is not equal to', and 'is under'. On the right side of the dialog box, there are several buttons: 'OK', 'Cancel', 'Add', 'Delete', 'Cut', and 'Copy'.

- Double-click the value field, select “Project Initiation” from the Select WBS window which appears:



- Click OK:



The activities you see now will be only those which match the filter criteria (“WBS is under Project Initiation”):

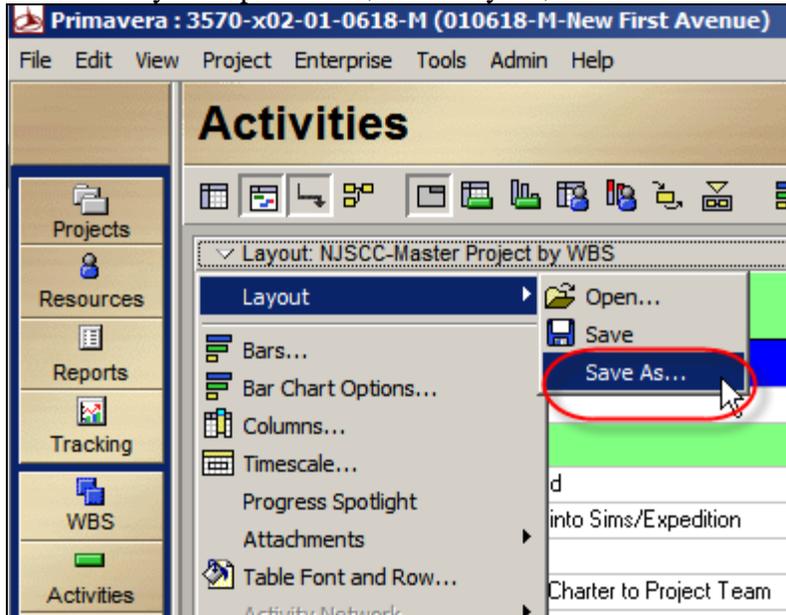
Layout: Training Layout		Filter All: Training Filter			
Activity Name	Original Duration	Early Start	Baseline Early Start	Early Finish	Baseline Early Finish
010618-M-New First Avenue	35d	09-Apr-07	09-Apr-07	25-May-07	04-Jun-07
Project Initiation	35d	09-Apr-07	09-Apr-07	25-May-07	04-Jun-07
DOE Transmittal Received	0d	09-Apr-07	09-Apr-07	09-Apr-07	11-Apr-07
SCC Verifies Data-Enters into Sims/Expedition	0d	09-Apr-07	12-Apr-07	09-Apr-07	16-Apr-07
Convene Project Team	14d	09-Apr-07	17-Apr-07	26-Apr-07	04-May-07
Transmittal of Preliminary Charter to Project Team	7d	27-Apr-07	07-May-07	07-May-07	15-May-07
Project Charter Approved	14d	08-May-07	16-May-07	25-May-07	04-Jun-07
Pre-Construction Phase	0d				
Site Feasibility	0d				
Land Acquisition/Relocation	0d				
Demolition/Abatement/Remediation	0d				
Design	0d				
Construction	0d				
Post-Occupancy	0d				

Note—remember that this filter will not be available to anyone other than the person who created it.

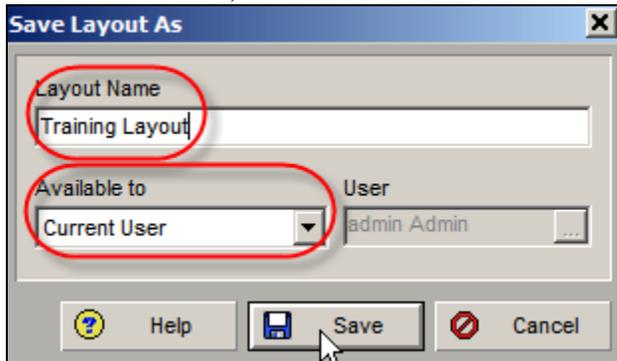
Saving Layouts

If you have made changes to the layout that you wish to save for future use, you can save the layout for your own personal use (user specific layout).

1. In the Layout Options bar, click Layout, Save As:



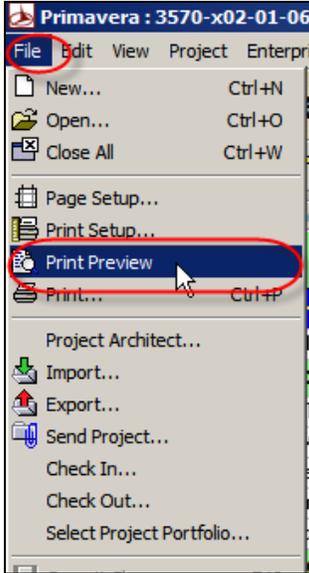
2. Type a Layout Name "Training Layout", verify that Current User is selected in the Available to field, then click Save:



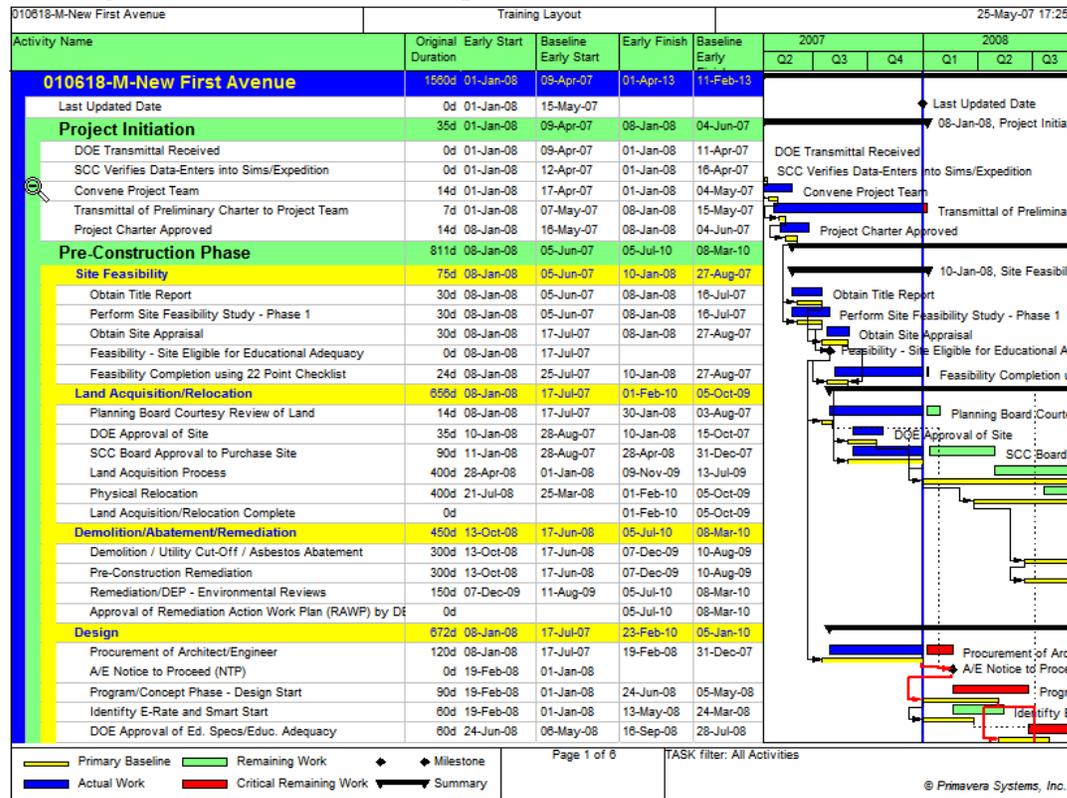
Printing from Current View

From any layout, you can choose File, Print to print a copy of exactly what the layout looks like on screen.

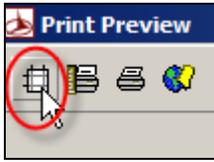
Click File, Print Preview:



P6 will generate a view of what the printout will look like:



To format the look of the print, click the Page Setup icon:



The page setup dialogue box contains multiple options to allow for the configuration of print specifications.

When satisfied with the look of the print preview, click the Print Icon to print the file:

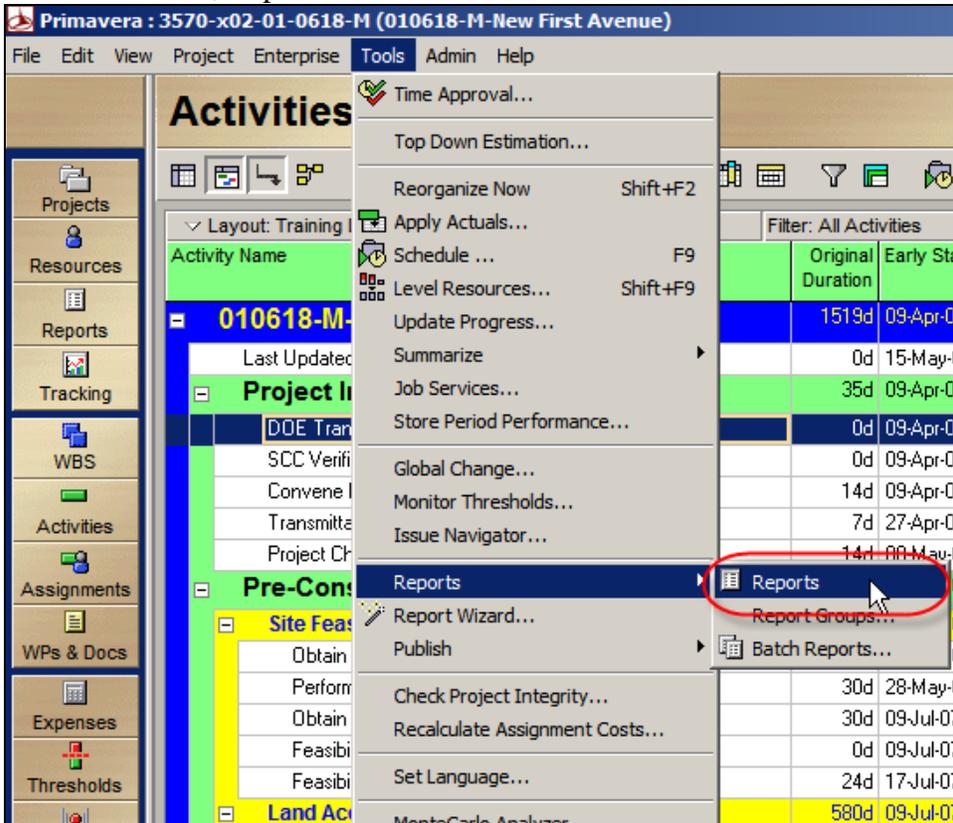


Reports

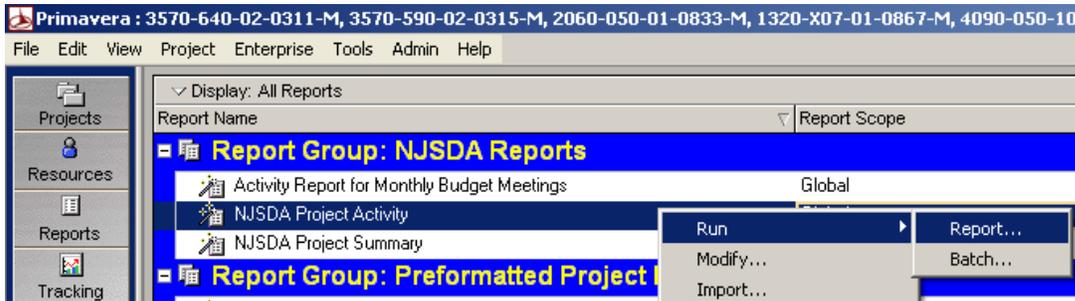
Running Preformatted Reports

There are several preformatted reports that users can use to view key data in various convenient formats

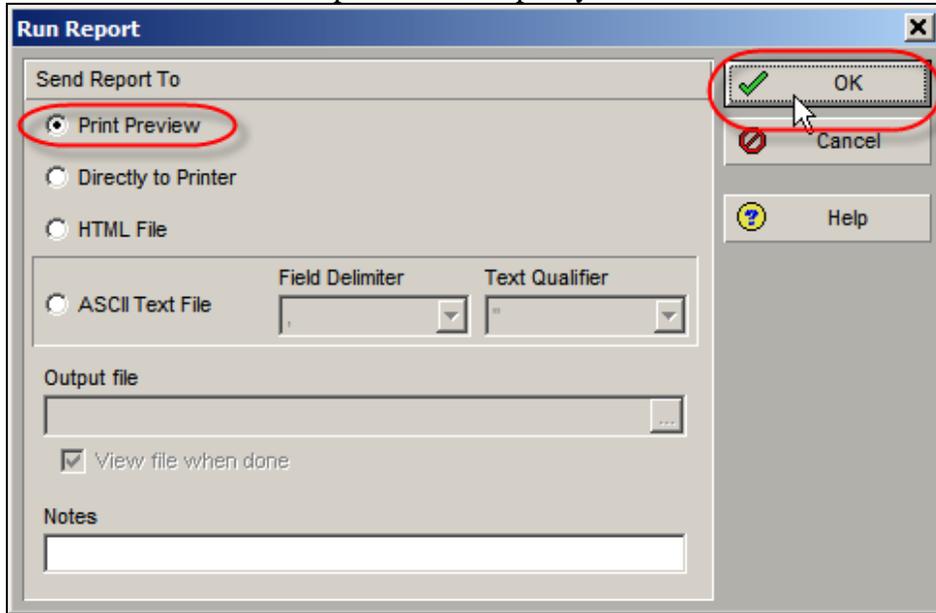
1. Choose Tools, Reports:



2. Highlight a report to run (NJSDA Project Activity), Right Click, and select “Run” and choose to run the report against the Current Project: or click the green arrow on the right of the screen:



3. The Run Report dialogue box appears, by default the option selected will be “Print Preview”. Click OK to preview the report you’ve selected:



The NJSDA Project Activity Report as a print preview:

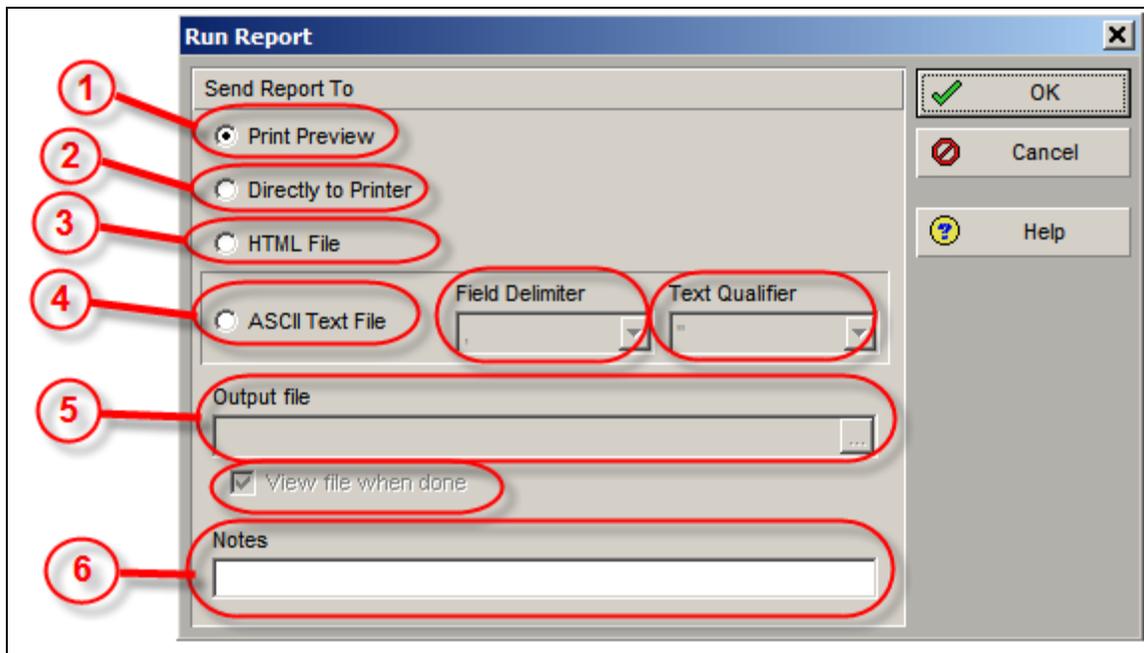
Print Preview

Newark - South Street School ES - MPS (020311)... 3/3/10 15:30

NJSCC Activity Status Report

WBS Activity ID	Activity Name	Original Duration	Remaining Duration	Activity % Complete	Start	Finish
East Orange - George Washington Carver Institute ES - MPS (020296)						
00001	Last Updated On 26-Feb-10	0.0d	0.0d	0%	2/26/10	
00002	ON HOLD - TRANSITION	0.0d	0.0d	0%		5/3/10*
A0000	PRE-DESIGN	0.0d	46.0d	0%	5/4/09 A	5/3/10
A1010	NJDOE Program Transmittal	0.0d	0.0d	100%	5/4/09 A	
A1012	Feasibility Study	1.1d	0.0d	100%	5/5/09 A	10/5/09 A
A1020	Planning Charter Development/Approval/Neto Period	50.0d	0.0d	100%	10/8/09 A	12/30/09 A
A1030	Design Consultant Amendment	44.0d	30.0d	31.82%	10/8/09 A	4/30/10
A1035	Procure Commissioning Consultant (ON HOLD)	31.0d	31.0d	0%	5/3/10	8/15/10
A1037	Commissioning Agent (CxA) NTP (ON HOLD) DESIGN	0.0d	0.0d	0%	6/15/10	
A1039	Design NTP	440.0d	440.0d	0%	5/3/10	1/8/12
A1040	Design NTP	0.0d	0.0d	0%	5/3/10	
A1050	Program/Concept Phase	80.0d	80.0d	0%	5/3/10	8/23/10
A1060	Review - Program/Concept	10.0d	10.0d	0%	8/23/10	9/8/10
A1070	Prepare Initial Project Charter	20.0d	20.0d	0%	9/8/10	10/4/10
A1080	Schematic Design Phase	70.0d	70.0d	0%	10/4/10	1/10/11
A1090	Review - Schematic Design	10.0d	10.0d	0%	1/10/11	1/24/11
A1100	Design Development Phase	80.0d	80.0d	0%	1/24/11	5/16/11
A1110	Review - Design Development	10.0d	10.0d	0%	5/16/11	5/20/11

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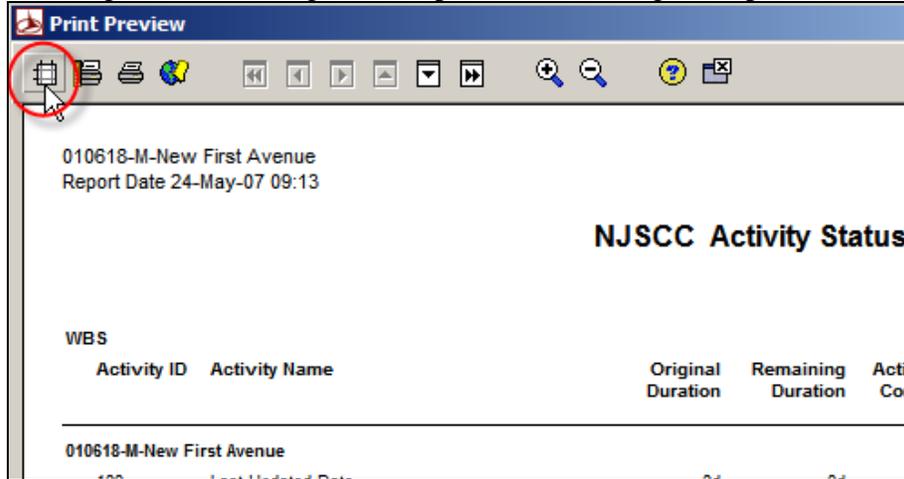


Available options on the Run Report Window:

1. Print Preview—Preview the report before printing it
2. Directly to Printer — Compile and print the report
3. HTML File — Compile and save the report as an HTML file for viewing through a web browser
4. ASCII Text File — Choose to compile and save the report as a delimited text file (.txt)
 - a. • Field Delimiter — Select the character used to separate categories of information that you save in delimited text format (i.e. comma, tab, space)
 - b. • Text Qualifier — Select the character used to separate categories of data that you save in delimited text format (.txt), if the data contains the field delimiter you specify (i.e. " or ')
5. Output file — If you choose HTML File or ASCII Text File, click to specify the file location and name where you want to save the report
6. View file when done — Mark this checkbox to automatically open the report in your default web browser for an HTML file or your default text viewer for an ASCII text file
7. Notes — Use to add a comment to the report. Comments will appear directly under the report title

Formatting Reports:

To change the formatting of the report, click the Page Setup Icon:

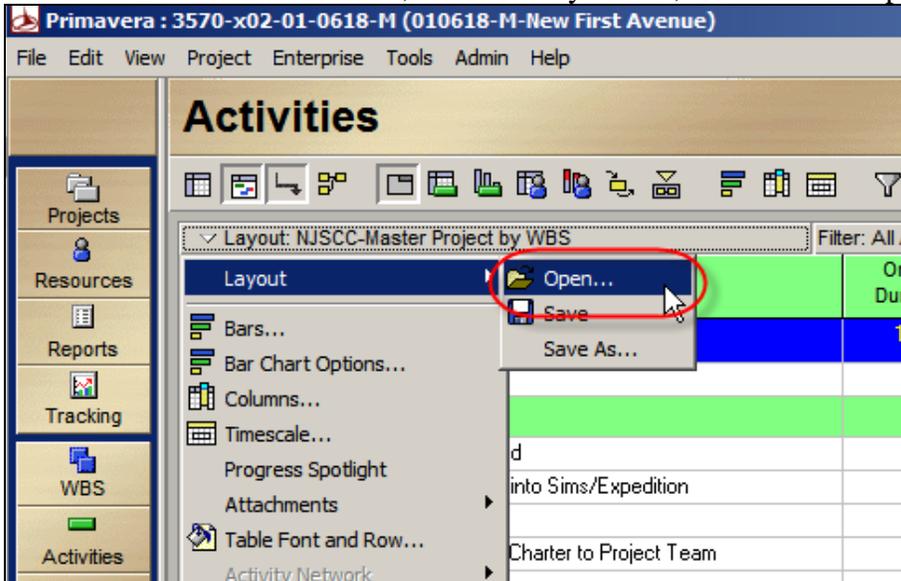


Creating a Report from the Current Layout

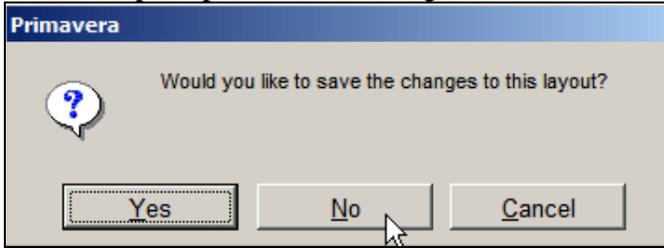
Using the Report Wizard, it is possible to create a report which mimics the layout currently applied to the activity view or uses the currently applied layout as a basis for a report and allows the user to modify the layout as desired.

Note—reports created using the Report Wizard will only be visible to the user who created them. Users cannot modify or delete predefined reports.

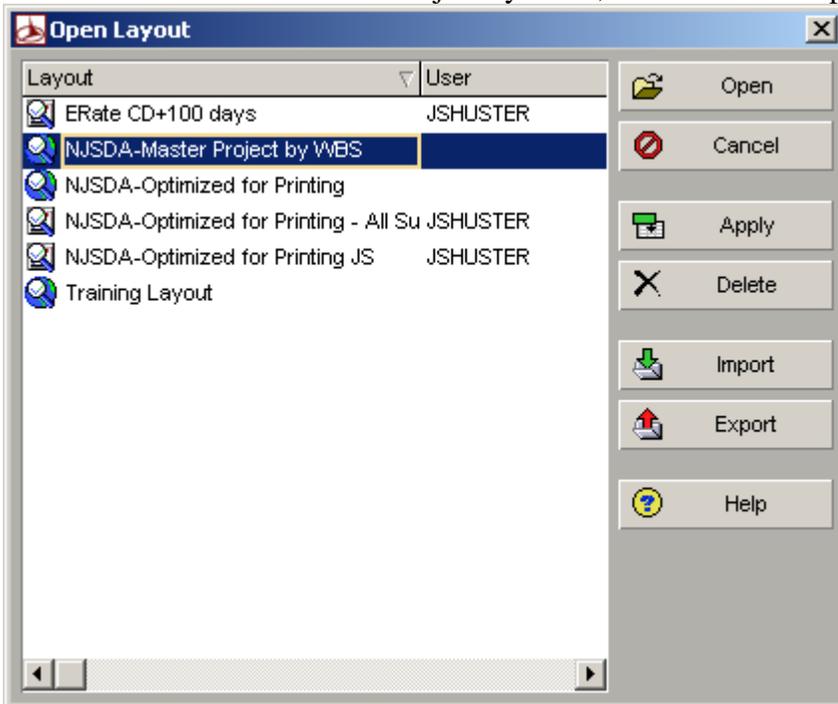
1. From the Activities window, click the Layout bar, then choose “Open”:



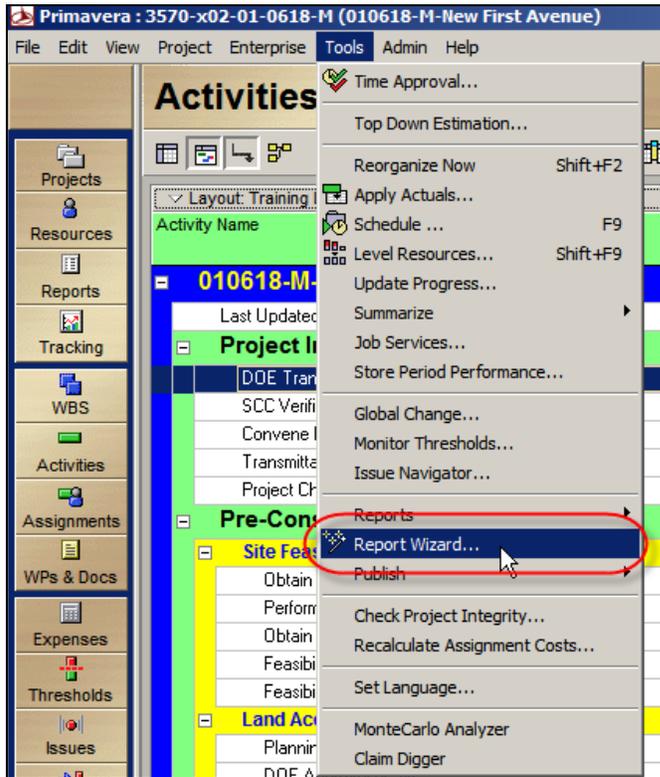
2. When prompted to save changes to the current layout, click No.



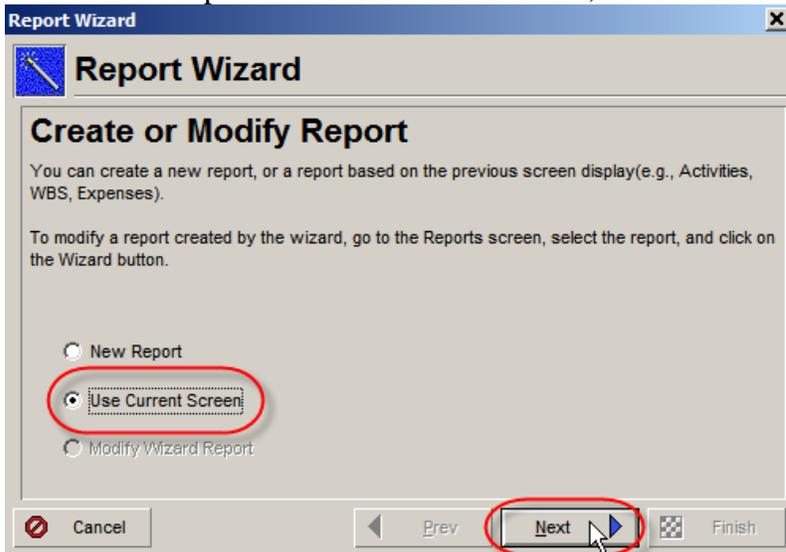
3. Select the NJSDA-Master Project by WBS, then click the "Open" button:



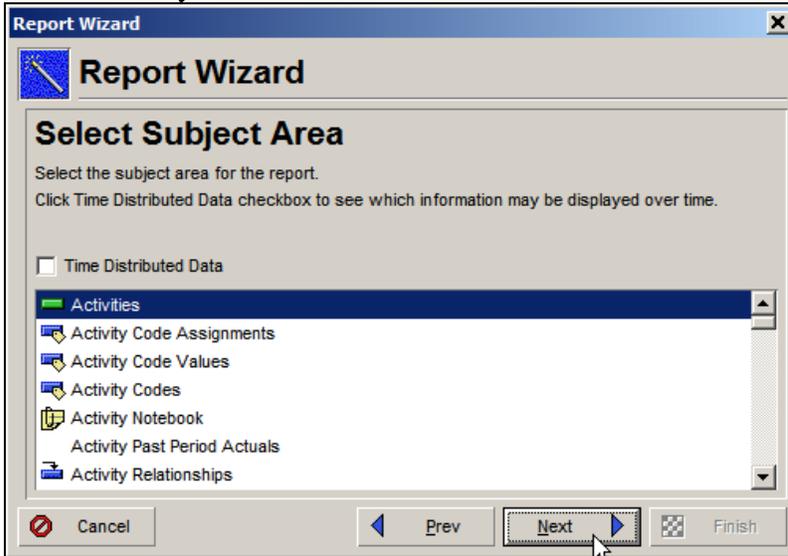
4. With the NJSDA-Master Project by WBS layout applied, choose Tools, Report Wizard:



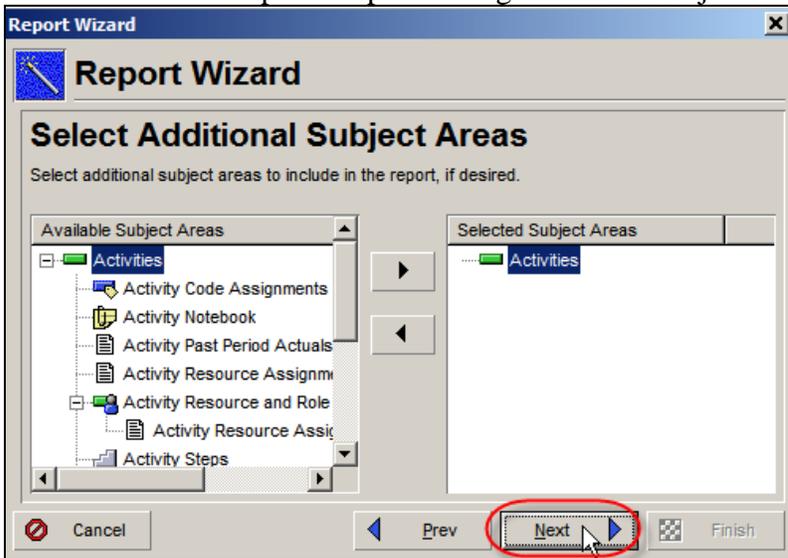
5. Choose the option to “Use Current Screen”, click Next:



- The subject area dialogue is automatically populated based upon the layout applied to the activity screen, click next:



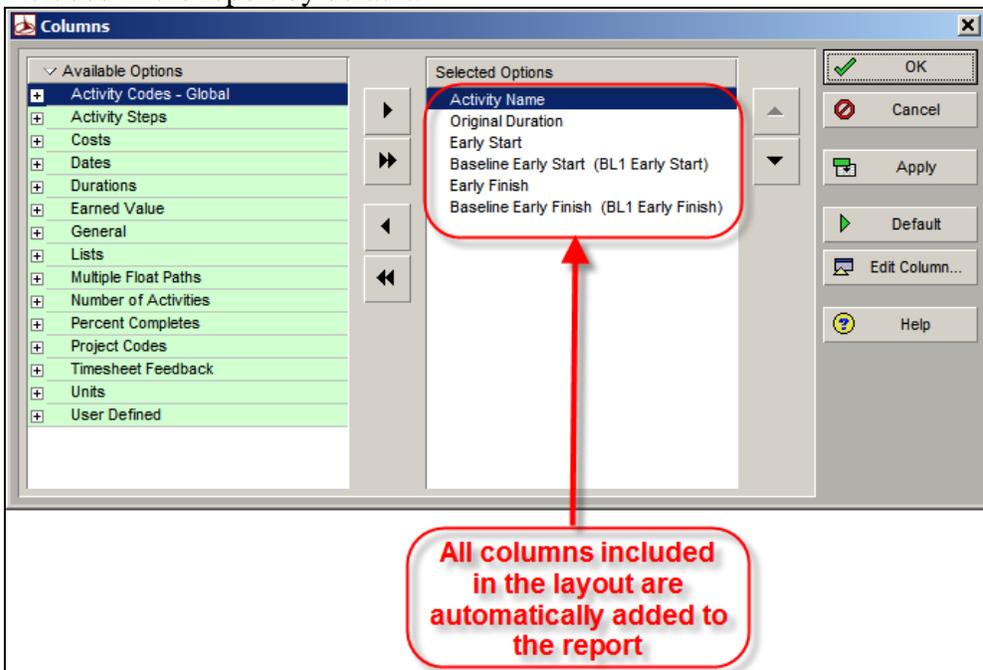
- Click next to skip the step of adding additional subject areas:



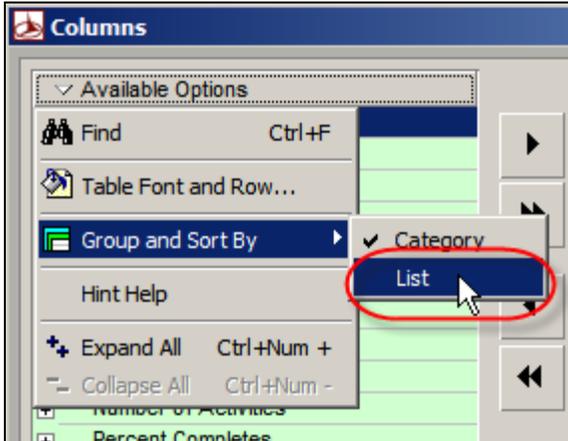
8. Click the “Columns” button at the “Configure Selected Subject Areas” dialogue box:



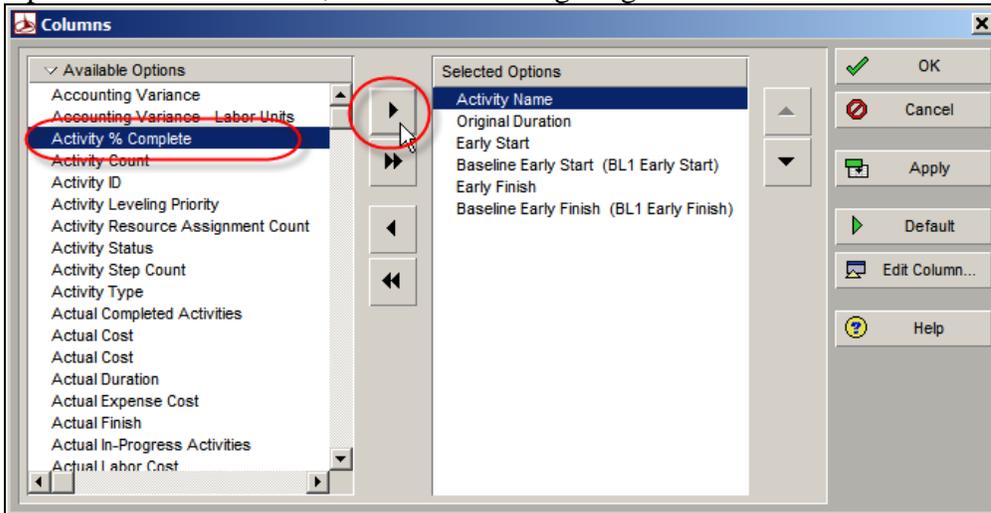
Note that all columns which appeared in the NJSDA-Master Project by WBS layout are included in the report by default:



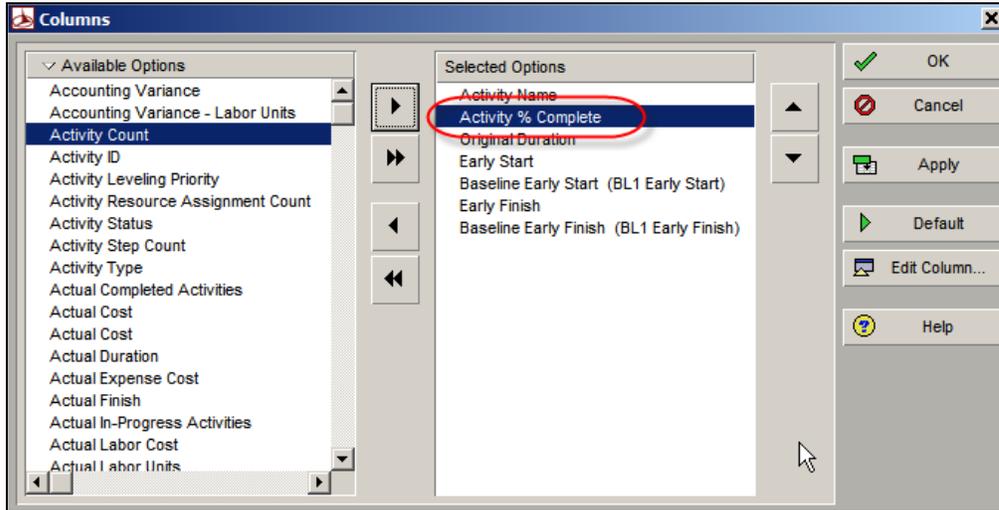
9. Click the Available Options bar in the upper left corner, choose Group and Sort By, List:



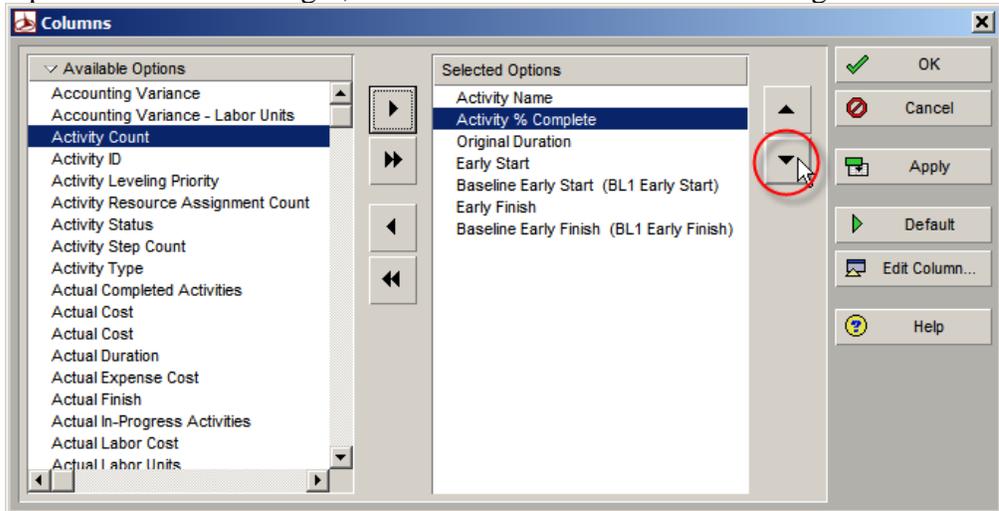
10. Highlight the "Activity % Complete" column by clicking on it once in the Available Options screen at the left, then click the single right arrow button:



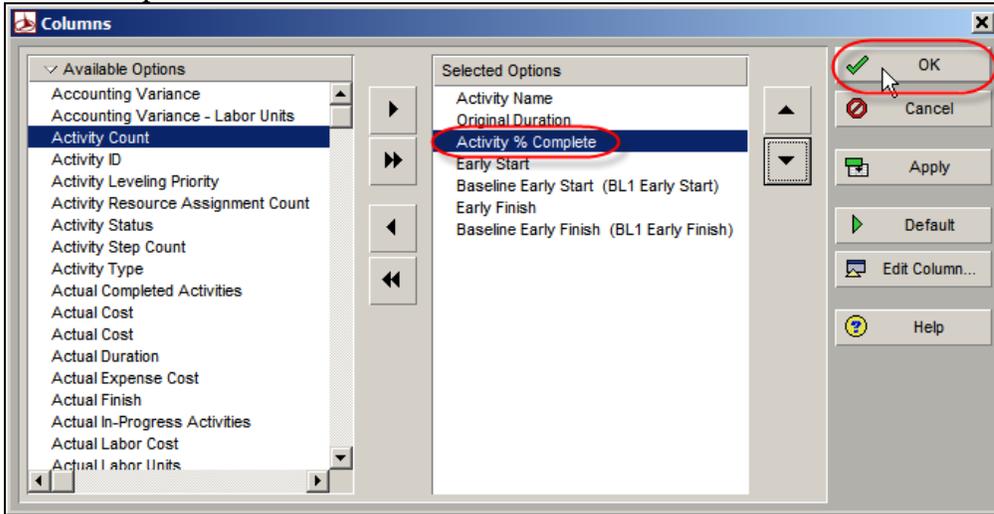
Note that the Activity % Complete column is now shown in the Selected Options screen at the left:



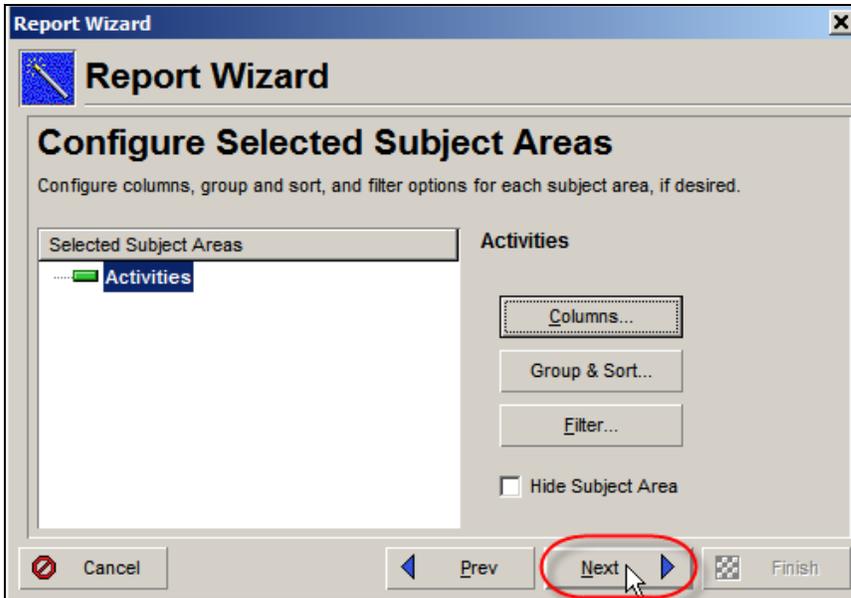
11. Click once on the Activity % Complete column to highlight it in the Selected Options screen at the right, then click the Down arrow on the right side of the screen:



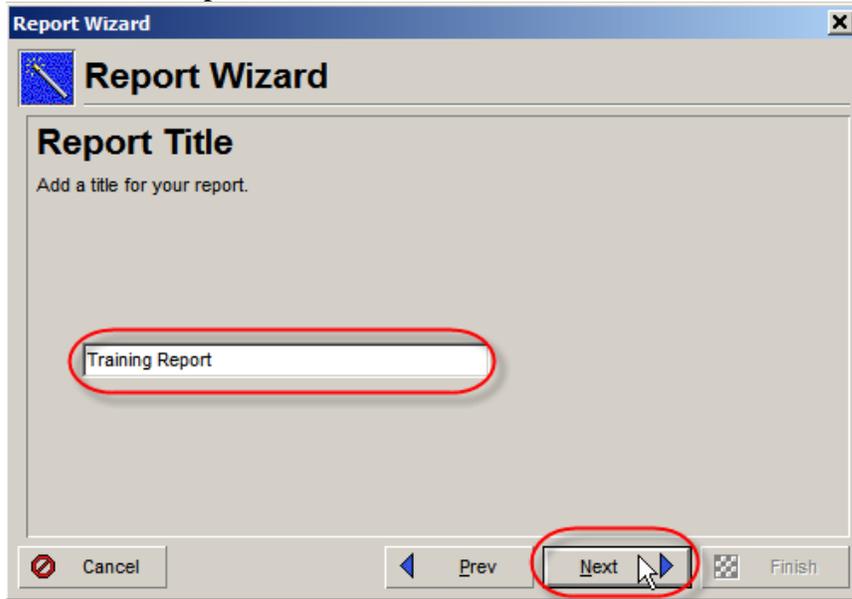
12. Note that the Activity % Complete has moved below the Original Duration in the Selected Options list, click OK:



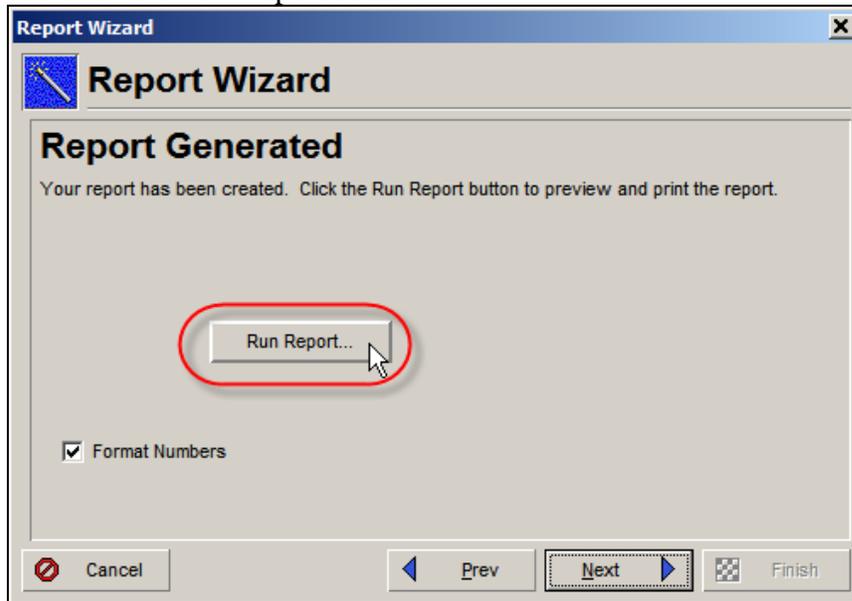
13. Click the Next button to continue:



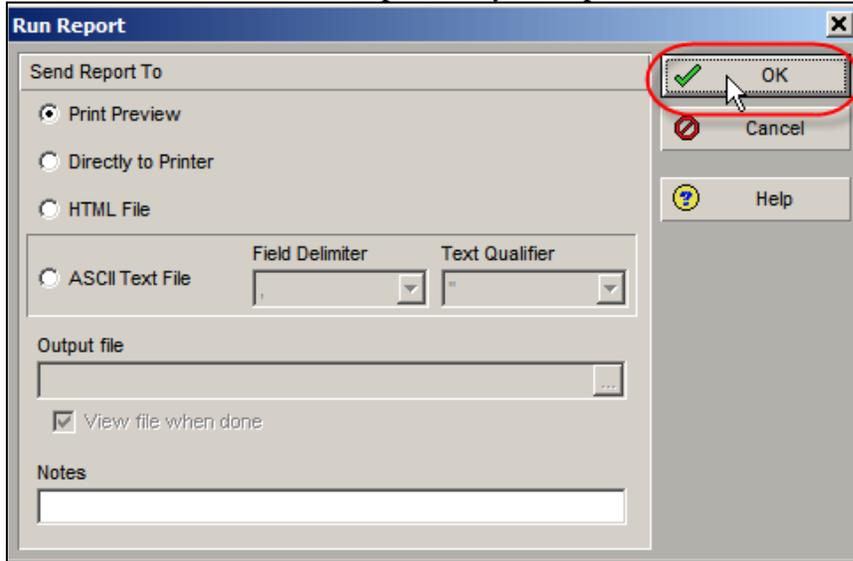
14. Give the report a title, then click the “Next” button:



15. Click the Run Report button:



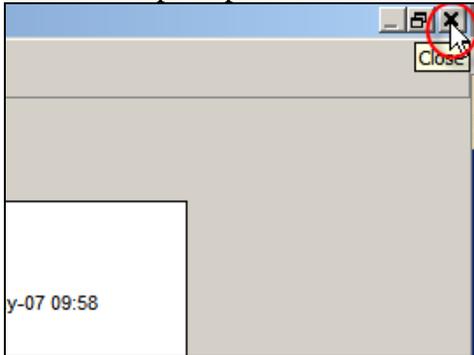
16. Click the “OK” button to preview your report:



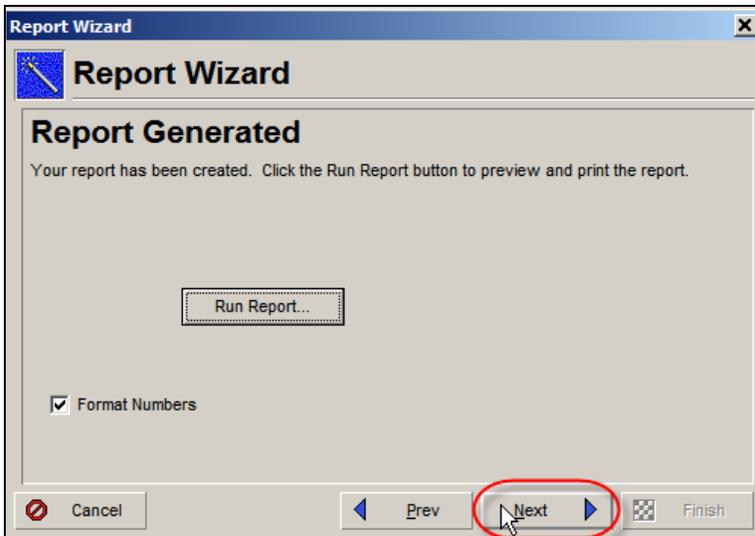
The report duplicates the NJSDA-Master Project by WBS layout, with the addition of the Activity % Complete field to the right of the Original Duration field:

WBS	Activity ID	Activity Name	Original Duration	Remaining Duration	Activity % Complete	Start	Finish
East Orange - George Washington Carver Institute ES - MPS (020296)							
	00001	Last Updated On 26-Feb-10	0.0d	0.0d	0%	2/26/10	
	00002	ON HOLD - TRANSITION	0.0d	0.0d	0%		5/3/10*
	A0900	PRE-DESIGN	0.0d	46.0d	0%	5/4/09 A	5/3/10
	A1010	NJDOE Program Transmittal	0.0d	0.0d	100%	5/4/09 A	
	A1012	Feasibility Study	1.1d	0.0d	100%	5/5/09 A	10/5/09 A
	A1020	Planning Charter Development/Approval/Veto Period	50.0d	0.0d	100%	10/6/09 A	12/30/09 A
	A1030	Design Consultant Amendment	44.0d	30.0d	31.82%	10/6/09 A	4/30/10
	A1035	Procure Commissioning Consultant (ON HOLD)	31.0d	31.0d	0%	5/3/10	6/15/10
	A1037	Commissioning Agent (Cx) NTP (ON HOLD)	0.0d	0.0d	0%	6/15/10	
	A1039	DESIGN	440.0d	440.0d	0%	5/3/10	1/9/12
	A1040	Design NTP	0.0d	0.0d	0%	5/3/10	
	A1050	Program/Concept Phase	80.0d	80.0d	0%	5/3/10	8/23/10
	A1060	Review - Program/Concept	10.0d	10.0d	0%	8/23/10	9/6/10
	A1070	Prepare Initial Project Charter	20.0d	20.0d	0%	9/6/10	10/4/10
	A1080	Schematic Design Phase	70.0d	70.0d	0%	10/4/10	1/10/11
	A1090	Review - Schematic Design	10.0d	10.0d	0%	1/10/11	1/24/11
	A1100	Design Development Phase	80.0d	80.0d	0%	1/24/11	5/16/11
	A1110	Review - Design Development	10.0d	10.0d	0%	5/16/11	5/30/11

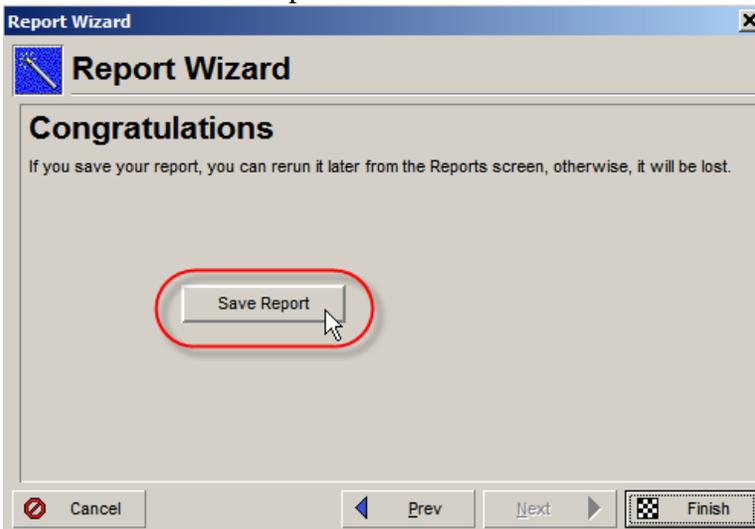
17. Click the “X” button in the upper right corner of the print preview dialogue window to close the print preview:



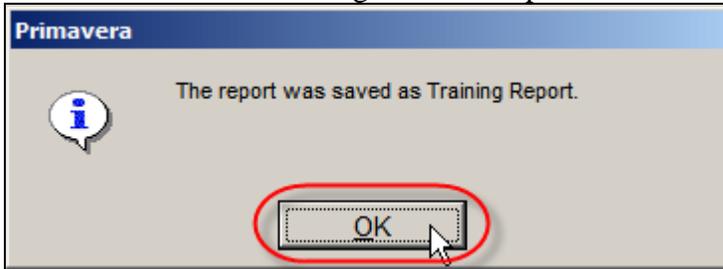
18. Click the Next button to continue:



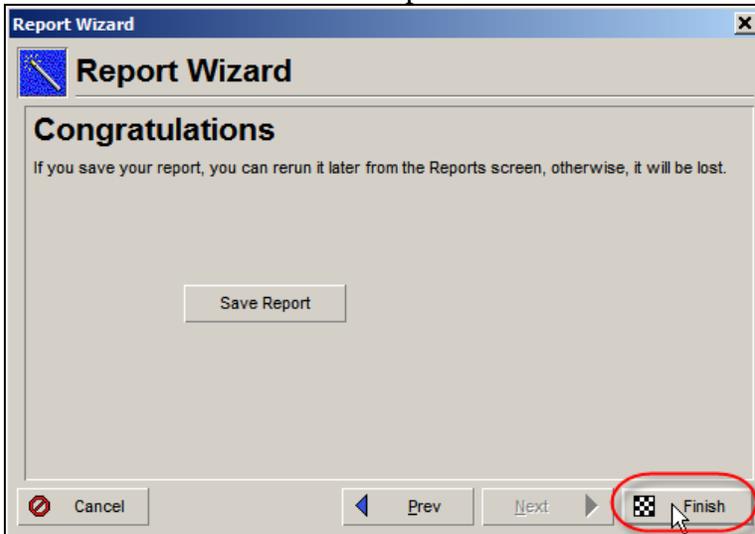
19. Click the Save Report button:



20. Click OK to acknowledge that this report has been saved:



21. Click finish to close the Report Wizard:

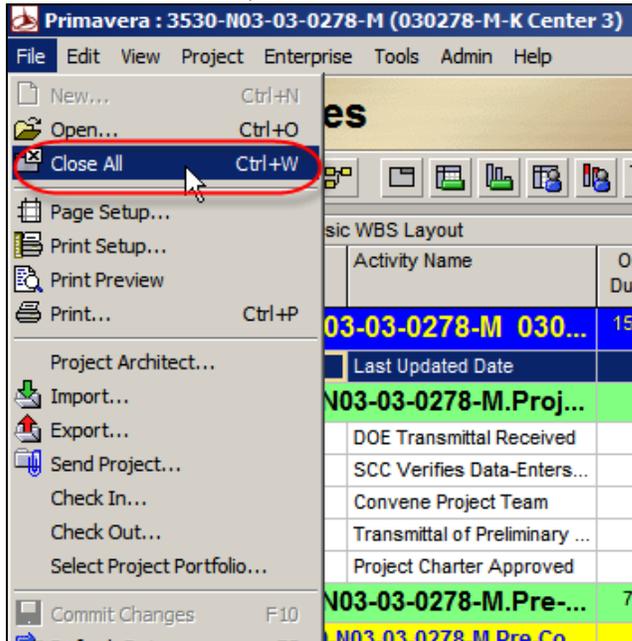


Note: Reports created using the Report Wizard will only be visible to the user who created them. Users cannot modify or delete predefined reports.

Closing Projects

Choosing to open another project will automatically close the project that you are currently working with. To close a project without opening another, use the Close All command.

1. In the File menu, click Close All



2. When prompted, click Yes:

