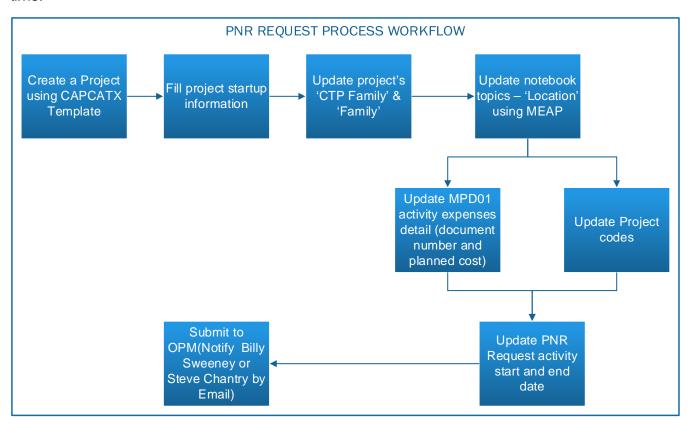
# 1. Initiate a Project

This section explains the PNR Process. The PNR Process is the process in which Project Numbers are requested. In summary, the process starts with creating the project using the appropriate project template. Once the template is selected, the next step is to fill out the appropriate codes, notebook topics, user defined fields, and expense information for the project. Project location information is updated using the MEAP application. Lastly, a baseline is requested and the project is sent to the Office of Performance Management for review before being sen to Finance for processing.

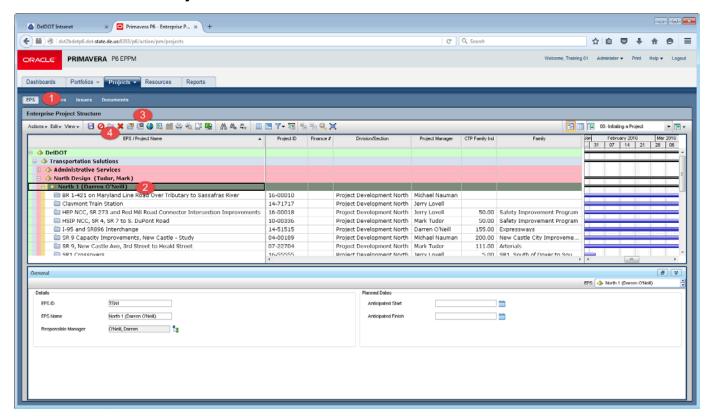
The following is a sample workflow process for PNR request that results in to a project in P6 EPPM with required information including a project baseline. The project baselines are created by Office of Performance Management (OPM) to track and measure progress over time.



# 1.01 PNR Request Process

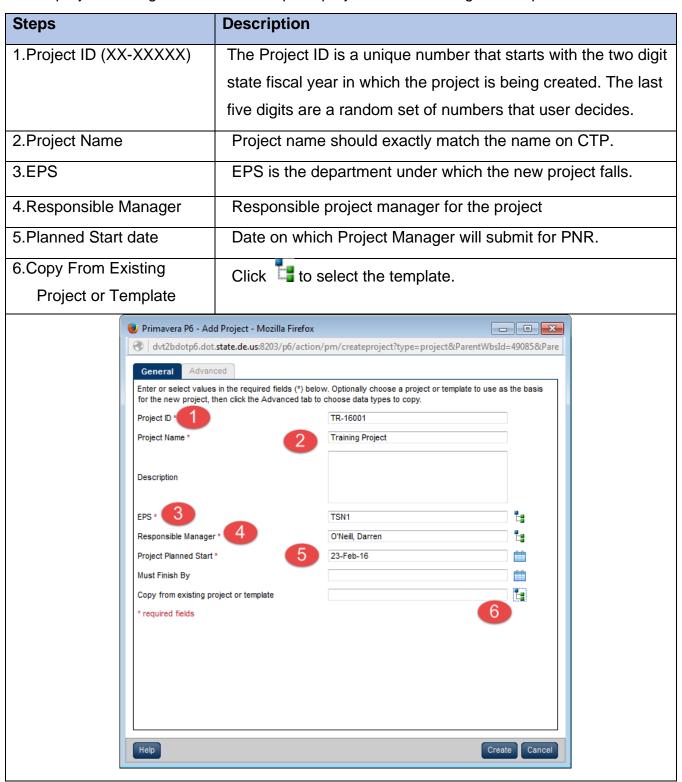
The PNR request steps are as follows:

- 1. Select **Project** and Click on **EPS**.
- 2. Open the layout called **00- Initiating a Project**
- 3. Navigate to the **EPS node** under which the new project falls.
- 4. In the toolbar click the icon to close all the projects.
- 5. Click on Add Project.

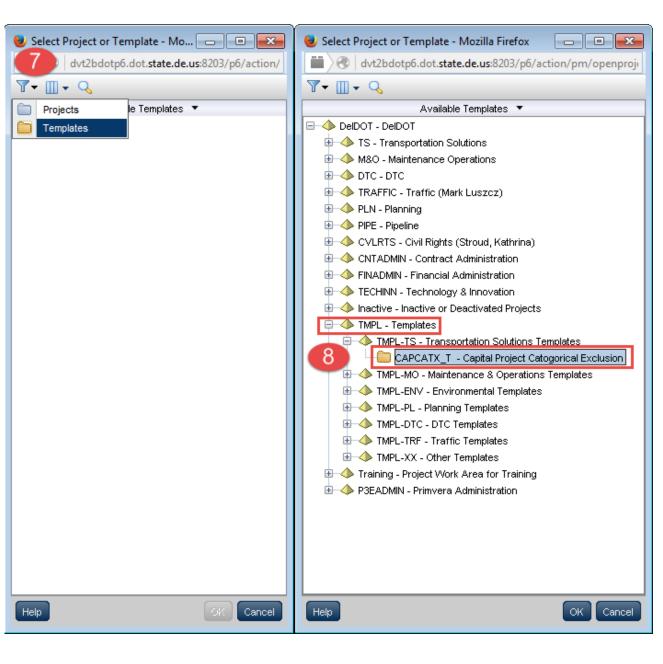


## 1.02 Project Details

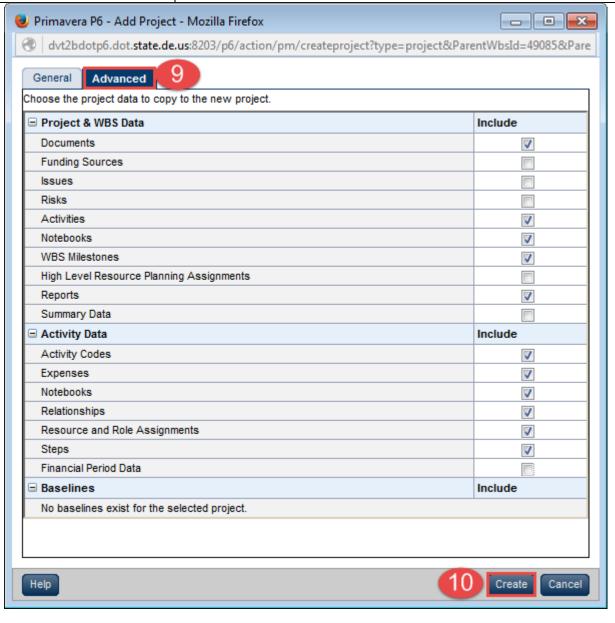
The Add Project command will open a window that requires additional information from the project manager in order to complete project creation using the template.

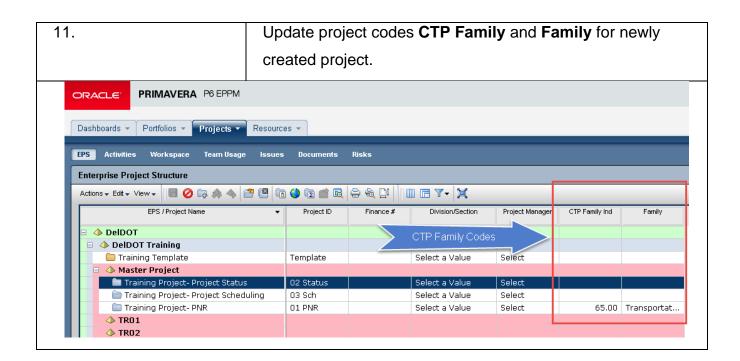


7.Filter	Using the filter icon select <b>Templates</b> .
8.Select template	Select CAPCATX template from the available choices. The
	location of the template may be moved under DelDOT for
	easy selection.



9.Advanced	Select on <b>Advanced</b> tab to review options available for		
	adding projects. The snapshot below is provided as an		
	appendix. Make sure that all checkboxes are checked prior to		
	creating a project.		
10.Create	Select Create in the Add Project window to create a new		
	project using the information		





# 1.03 Notebook

Project Justification

Description Codes General Issues Notebooks

Once the project is created, in the **EPS** window use the project details window to update the notebook topics. At minimum, project managers are required to update the following topics with relevant information.

followin	ng topics with re	levan	t information.			
Notebool	book Topic Description					
Project Justification Th			description should include the probable cause/need for			
	undertaking the project.					
Project De	escription	Desc	cription of the work to be performed in the project.			
Location (	Comments	Any	special note regarding the location of the project			
Design Co	omments	Any	special project design consideration/design related	d comment.		
Inlcuding but not limited to the the expected amount (or percentage)			should include an explanation of the funding for the diding but not limited to the the Federal/State/Other ected amount (or percentage) of money needed by and the source of funding if known.	split,		
	Notebooks					
	<b>₹</b>					
	Topic		Description			
	CTP Picture #1					
	Design Comments					
	Funding Comments		Project is eligible for federal funds using NHS or			
Location Comments						
Location Log			Thu Oct 15 12:57:13 EST 2015 BRIDGE BR 1-421 461 Begin Mile			
	NBI Bridge #					
Project Description			This project involves the replacement of Bridge 1-421. Work incl			

There is significant corrosion at the waterline with 100% sectio...

## 1.04 Location Data

The location data must be entered through the MEAP application. The process of working with MEAP application is not covered in this manual. However, once the location information is sent to P6; several project codes will be assigned through built-in integration including update to notebook topic.

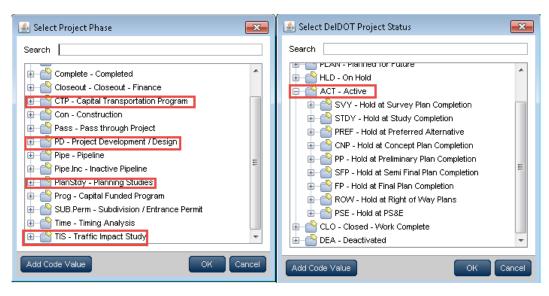
# 1.05 Project Codes

Project	Codes			
codes are	<b>☆</b> 🗶			
assigned	Name	Value		Description
to a project	DelDOT Project Status	Active PD		Active
	Project Phase			Project Development / Design
and are	Project Template	TS.CAPBRDGSF		Capital Project Bridge - Start at Semi Finals
eventually	Project Type	BR.RPL.NAC		No Added Capacity
-	Publish to Web	Yes		Publish Project on Web
used by	Railroad Involved	No		No
different				
systems				
within				
DelDOT				
and will be				
used in	Codes Description G	eneral Issues	Notebook	(S

project level reporting as well. Below is a list of important project codes.

# For the **DelDOT Project Status Project Code**, use the following criteria.

Code Values	Description
ACT	For Immediate projects with Funding assigned to them on CTP
PLAN	For future projects with no funding assigned to them on CTP or with funding that is not within the next 2 State Fiscal Years.



For the **Project Phase Project Code**, use the following criteria:

Code Values	Description
PD	For projects that are just starting in the Project Development
	Phase. This value is used most often and should be used
	even on Program initiations until the Project Number is
	assigned.
PlanStdy	For projects that are in the Planning Study phase and not in
	Development.
СТР	Projects used as a placeholder on the CTP as buckets of
	money and should only be used upon approval
TIS	Projects considered for Traffic Impact Study and is rarely
	used.

**Note:** A Project Code definition document is currently being developed to explain how each project code should be used and what values should be chosen. Once that is complete, and email will go out with a link to it

Also Note: Some project codes do not apply to all projects, however, do not remove.

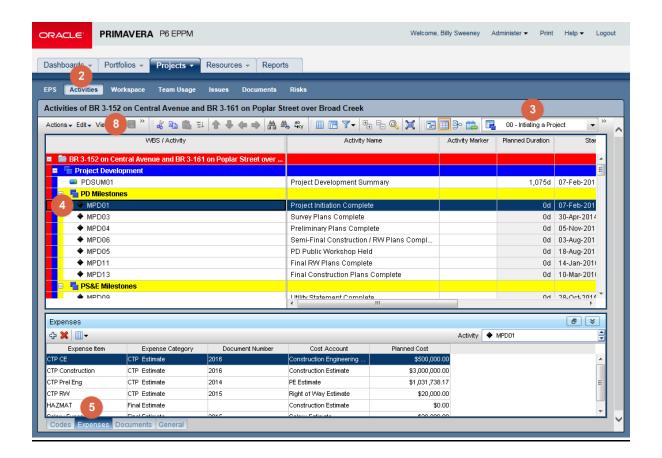
# 1.06 Activity Update Details

There are a number of items that need to be updated in the activities prior to submitting the project for Project Number Request. The estimate must be entered (by phase), activities not needed should be marked to be dissolved, any activities that have been started or completed should be marked as such, and the Baseline Request Sheet should be attached to the project. All before sending the project to the Office of Performance Management for Review.

### 1.06.1. Estimate updating

- 1. Select and open the **Project**.
- 2. Click on the **Activity** button along the top of the screen.
- 3. Open the activity view called **00- Initiating a Project**
- 4. In the activity table, select milestone activity **MPD01**;
- 5. Click on the **Expenses** tab in activity detail window.
- 6. In **Expenses** tab, update the value for planned cost and document number.
  - a. The Planned Cost column is the estimate that was developed for that phase.
  - b. The Document Number column is the first State Fiscal Year that funds are expected to be spent on that phase (even if it is 100% federal funds).
- 7. **Do not update or change** the other columns in **Expenses** tab.
- 8. Click Save ...

(See next page for a screenshot referencing the steps above)



## 1.06.2. Updating Activities

Activities can be updated, modified and dissolved during PNR request process.

However, the project manager should contact Billy Sweeney for further clarifications and ensure that changes made to activities are reflected accurately in the project plan. This is further discussed in detail in **Updating Activities** section of this document (Page 17).

### 1.06.3. Project Baseline

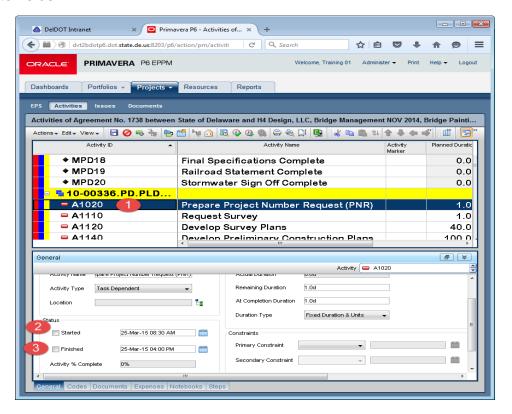
For projects that have plan submissions that will be sent for review and/or will PS&E a baseline will need to be developed for the project's schedule. A blank Baseline Request form can be found by clicking this link.

1) Project Manager should fill out the appropriate fields in Baseline Request Sheet, save it to their personal project folder, and then attach it to Primavera P6 using the method described in the document titled "Attaching a Document to P6". That document can be found by clicking on this link.

## 1.07 Project to OPM

After completing above steps, project manager should follow these steps to submit the project to OPM.

- 1. Update the activity A1000 Send Project to OPM for Review from the activity lists.
- 2. Highlight the activity and select the **General** tab in activitiy details window.
- **3.** Check the boxes next to started and finished and revise the date of submission in the date fields.



**Note**: The warning message stating "Remain Finish Date cannot be earlier than Remain Start Date" may show up while updating activities. In such event change the finish date to one day later than the start date.

- 4. Project managers are advised to send an email informing completion of project creation process and project being ready for review to P6 administrators.
- 5. After this email OPM will review the project for conformity and upon approval send the request to the Finance department to generate a project number.

## 1.08 Scheduling

#### 1.08.1. Data Date

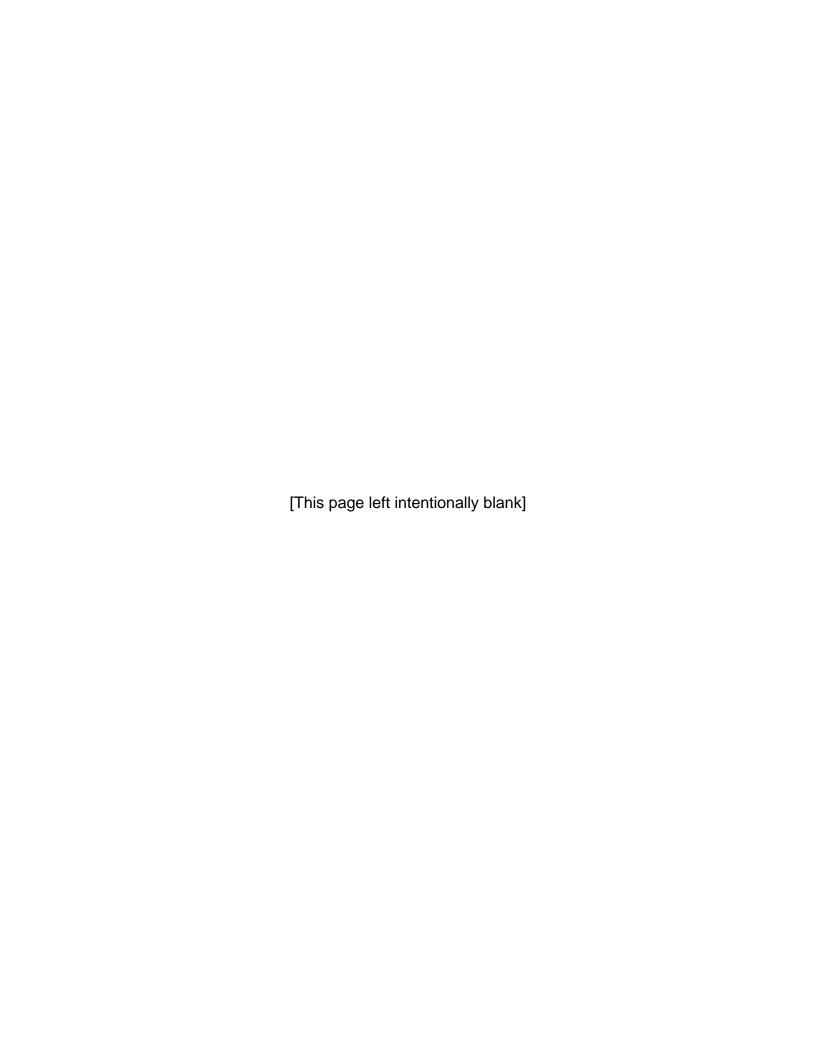
The data date is the date project progress is recorded in the form of actual dates, percent of work completed, revision to remaining duration and actual quantities or costs. All remaining activities are scheduled from the project data date that can be changed when running the schedule command in the application.

#### 1.08.2. Schedule (F9) Steps

Schedule the project on a regular basis usually with every monthly update to keep track of activities, actual durations, and costs. The update process provides the project manager with current project information supporting decision making as well as forecasting the project performance.

### (i) To schedule projects:

- 1. Open the **Project** to be scheduled.
- 2. On the Projects navigation bar, click **Activities**.
- 3. On the activities page, click on toolbar Select Run Scheduler (or the F9 key).
- 4. In the Schedule Project dialog box:
  - a) Configure the options and fields.
  - b) Click Schedule.



# 2. Estimate Update

The project manager is responsible for updating and maintaining the project estimates at each project design milestone (Initiation, Preliminary, Semi-Final, and Final). However, in P6, the estimate is only captured under the MPD01 Milestone Activity. For more information on exactly how to enter or update estimate information, refer to the Users Guide to Estimates document by clicking this link.

As for initiating a project, we are concerned with 5 different estimate phases:

Estimate Phase	Description
CE	Construction Engineering Estimate
CONST	Construction
PD	Project Development estimate
PE	Preliminary Estimate
RW	Right of Way estimate

As mentioned above, all estimate information will be entered under PD Milestones Activity – **MPD01 – Project Initiation Complete**.

There are five columns of data fields in the expenses tab:

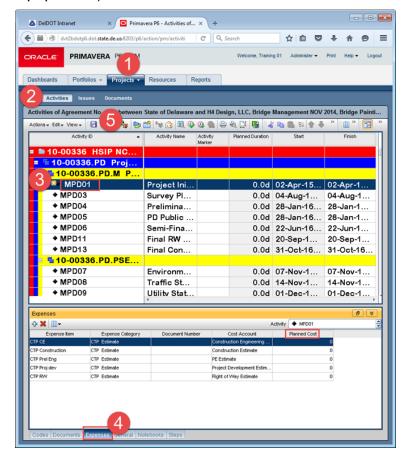
Expense Column	Description			
Expense Item	This field includes different phases of the estimate. (CE, PD,			
	PE, RW, and CON).			
Expense Category	This field includes different estimate types (CTP Estimate,			
	Prelim Estimate, Semi-final Estimate, Final Estimate, and			
	Award Value).			
Cost Account	This field includes cost account for different phases (PRD,			
	PE, RWEST and CON.)			

Document Number	This field is a four-digit number representing the fiscal year of			
	the first spend for a particular phase.			
Planned Cost	This field is for entering the estimate value for that particular			
	phase.			

The project manager will be responsible for filling out, at a minimum, the **Document Number** and **Planned Cost** columns as explained in the chart above. (Projects created through a template will have the other fields populated).

# 2.01 Steps for the Estimates

- 1) Select **Project** in P6 navigation bar.
- 2) Open Activities page
- Under activities, select the milestone activity MPD01.
- In the Activity Detail Window select Expenses tab and update the planned cost column.
- 5) Click on Save 1.



# 3. Activity Updates

Project activities are created at the time of initiation from the template. From time to time the project manager may want to modify activities that are in the standard template. The modification includes but is not limited to the following items.

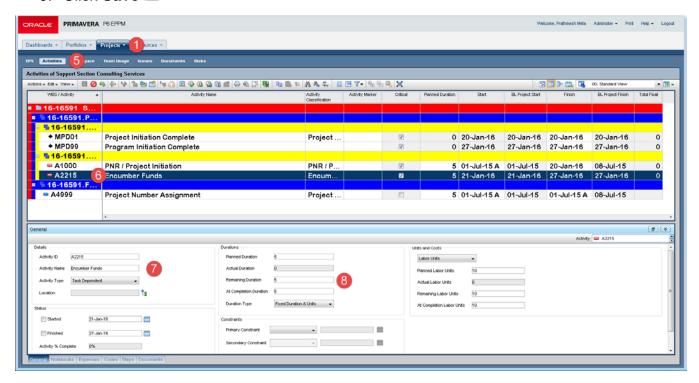
- i) Add new activities = new activities may need to be added to the project plan to adjust project specific requirements. Project manager should be careful adding activities without relationships or dependency with other activities within the project. Project managers should inform a P6 Administrator when adding new activities to the project plan.
- ii) Revise Duration = new activities that may need revisions to the duration of activities. The durations used in the template are standard durations, however the project manager may want to fine tune these durations. If so, they should schedule the project after every change to review changes to the overall project plan.
- iii) Remove Activities = any activities that are not needed can be removed from the project plan. At this time due to the complexity of the project plan the project manager should change the Activity Marker activity code to indicate intent to remove the activity to the P6 Administrators.
- iv) Rename Activities = project manager can rename any activities in the project plan to suit project requirements.

The following are general steps that can be used to update activity data within a project.

### 3.01 Revise Activities

- 1. Click Projects.
- 2. On the **Projects** Navigation bar, Click **EPS**
- 3. On the **EPS** Page, select the **Project** in which activities needs to be updated.
- 4. Click on the **open project** ho open the project.
- 5. Click on **Activities** Page in Project navigation bar.
- 6. Click on the activity which is to be updated.
- 7. To rename the activity,
  - a) In the bottom Activity detail window, click on the Activity name to rename the activity.

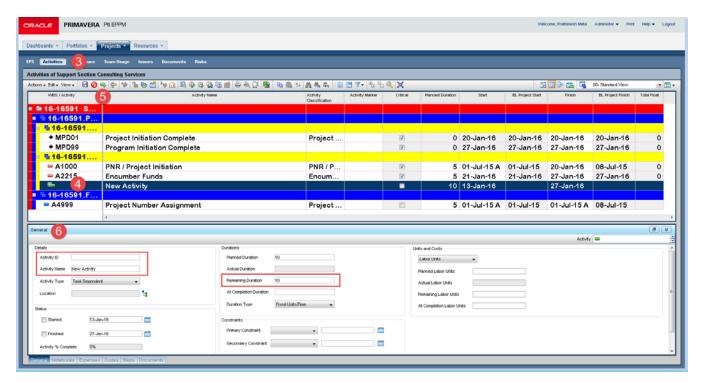
- b) Enter the **new name** of the activity.
- 8. To **Update** the remaining duration,
  - a) Click on the **remaining duration** field.
  - b) Enter the new duration
- 9. Click Save



#### 3.02 Add New Activities

New activities can be added to the project plan.

- 1. On the **EPS** Page, select the **Project** in which activities needs to be updated.
- 2. Click on the open project in to open the project.
- 3. Click on Activities Page in Project navigation bar.
- 4. Click on the **activity** where new activity is to be added.
- 5. Click on add new activity salfrom the toolbar.
- 6. In the activity detail window,
  - a) Click on the General tab
  - b) Fill the information in Activity ID, Activity duration, and remaining duration fields.
- 7. Click on Save



**Note:** Relationships must be added to newly added activities. To do this, please notify the P6 Administrators explaining the intent of the new activity and dependency, and P6 Administrators will add relationships to the activity.

# 3.03 Dissolve Activity in the project

To delete or remove an activity from the project plan the project manager must use the **Activity Marker** activity code to identify the activity that needs to be removed.

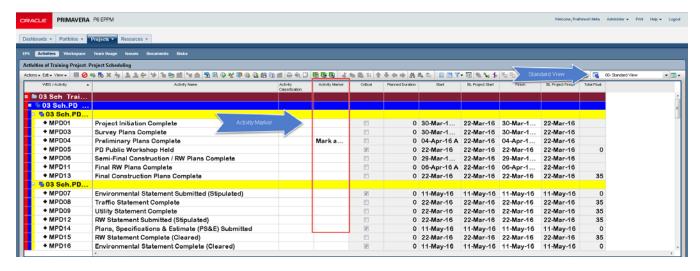
Dissolving an activity removes the dissolved activity and joins the activity's predecessor and successor activities to maintain the project's network logic.

In DelDOT Project manager can dissolve the activities by marking the activity to dissolve in **Activity Marker** column and sending an email to P6 administrators.

## 3.03.1. Steps to dissolve activities

- 1. Select Projects.
- On the Projects Navigation bar, Click EPS
- On the EPS Page, select the Project in which activities needs to be marked for dissolving.
- Click on the open project hopen the project.
- 5. Click on **Activities** Page in **Project navigation bar**.

- 6. Click on the activity which is to be dissolved.
- 7. In the activity marker column, double click and select Dissolve in the dialog box. Select **Ok.**
- 8. Click on Save ...

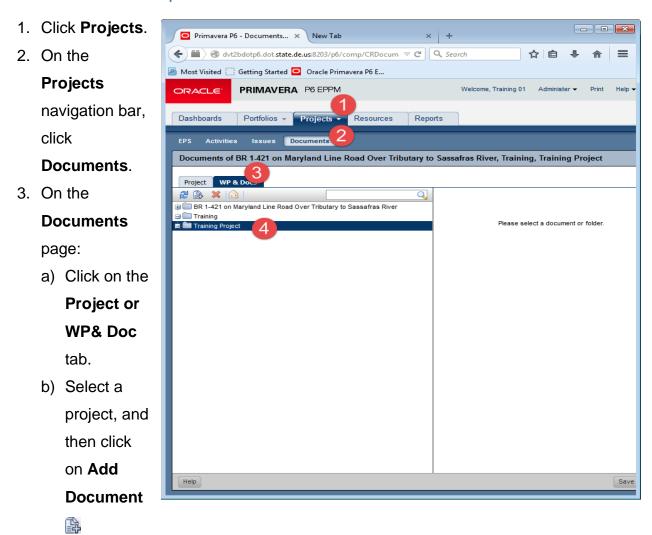


## 4. Work Product and Documents

A document is a file or work product that is created or attached to a project and subsequently to an activity. The application provides document attachment capabilities that enable the user to store, organize, manage, and access documents in Primavera P6. The features include check-in, check-out, and document reviews.

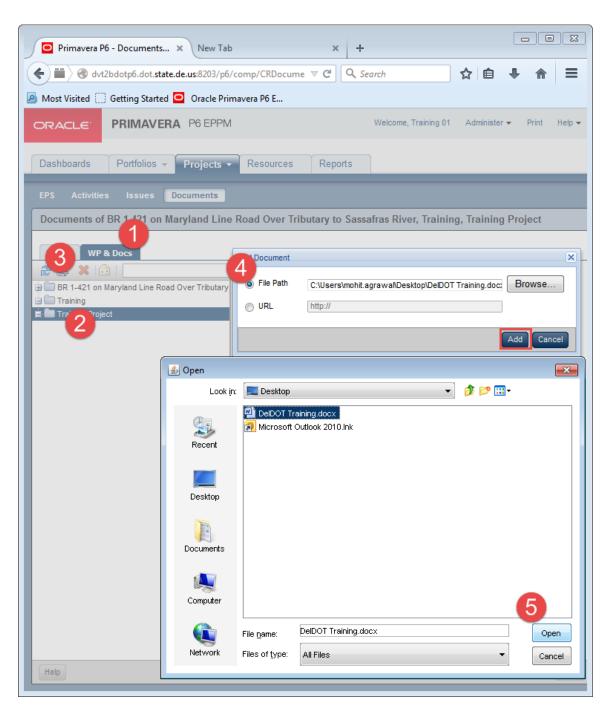
Project documents are documents that can be related to a project via P6. Only users with the necessary securities can edit project documents.

## 4.01 Document Upload



- In the Add Document Window, select File Path option and Click on Browse Button.
- d) Navigate to the location of the file, select the file and Click open.

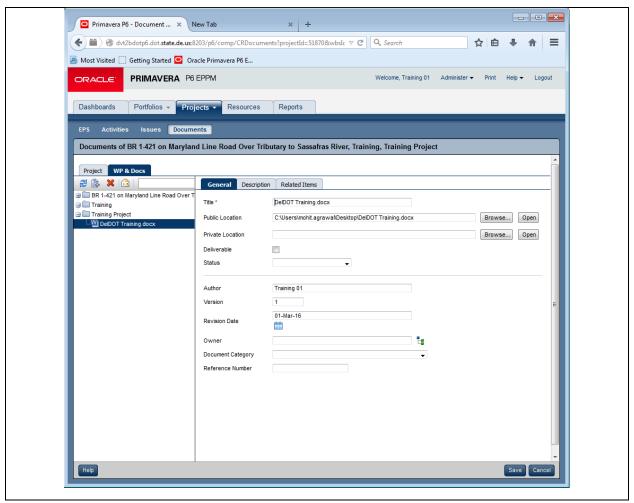
e) Once the file has been opened, Click Add button on the Add document window.



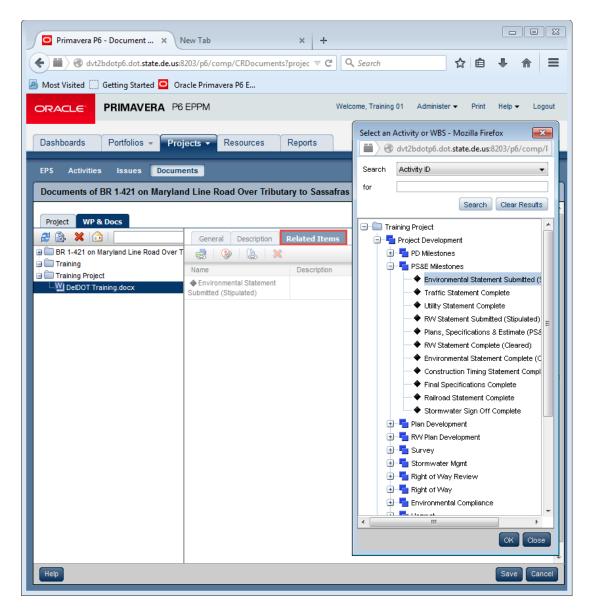
4. Click the General tab and fill out the information.

Item	Description

Title	The name of the document				
Public Location	The publicly-accessible file location of the selected				
	document. All project participants can view this file.				
Browse -	Enables you to select a file to a Public or Private Location				
	from the Select dialog box.				
Open -	Enables you to launch the file				
Status -	The current review status of the document.				
Author -	The resource that created the document.				
Revision Date -	The date of the document's last update.				
Owner -	The resource responsible for the document.				
Document Category -	The classification label used to organize documents.				
Reference Number	- The document's reference number. The user defines the				
	reference number.				



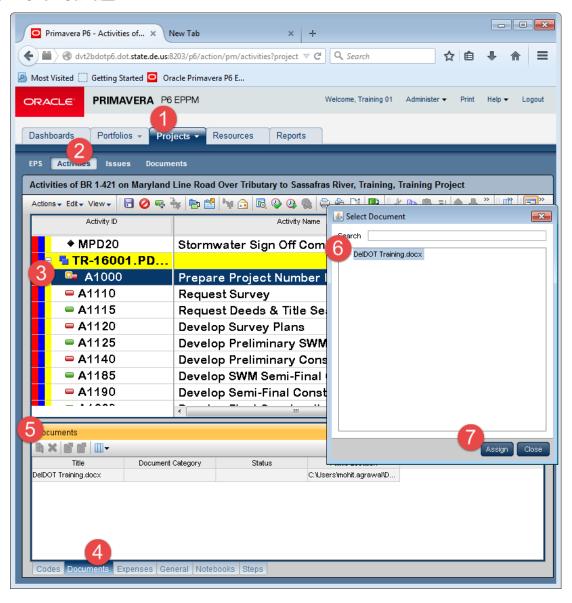
- 5. Click on **Description** tab and fill a description about the document.
- 6. Click on the Related Items Tab.
  - a) Click on **Relate activities** or **WBS** do assign the document to an activity.
  - b) Click on **Relate issue P** option to relate the document to an issue.
  - c) Click on **Related Documents** a option to attach any other document or file to this document.
- 7. Click Save

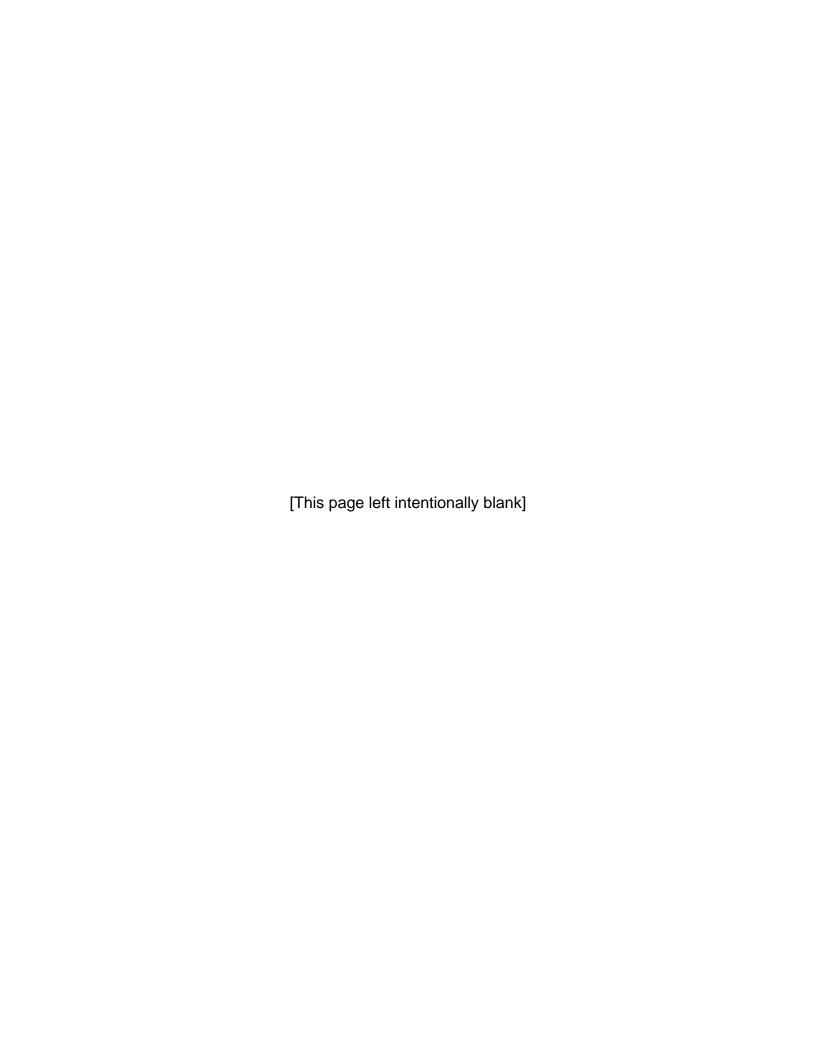


# 4.02 Document Assignment

- 1. Click on Projects
- 2. Click on **EPS** on project Navigation Bar.
- 3. Navigate to the project and then click on **Open project** option in the toolbar.
- 4. Click on **Activities** page, and select the **activity**.
- 5. In the activity detail window click on **document tab**.
- 6. Click Assign (insert).
- In select Document window, select the documents you want to add and click assign and then close.

### 8. Click Save ...



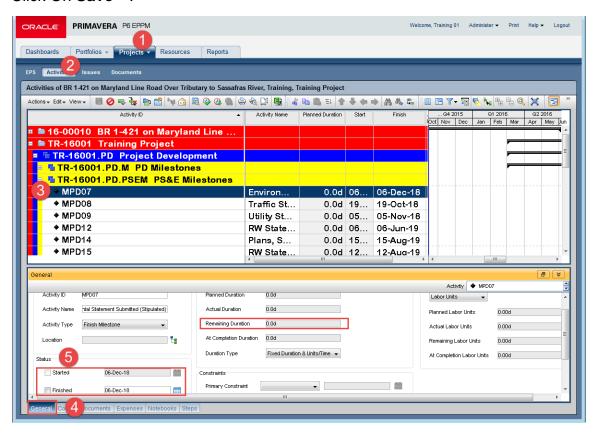


# 5. Activity Status Updates

The responsible manager for the WBS element updates the activities on a weekly basis, this update includes updating the start and finish dates of the activities and duration in which the activities were completed. It is important that project managers update the project plan on a regular basis to make sure that the project status report is up to date.

### 5.01 Status Activities

- 1. Click on **Project**, go to **EPS** and open the Project.
- 2. Click on **Activities** on project navigation page.
- 3. Select your **WBS Element** and Click on the **activity** to update.
- 4. In Activity detail window, click on General Tab.
- 5. In **General tab**, update necessary information such as the **start date**, **finish date** and **remaining duration**.
- 6. Click On Save.



### 5.02 Status of Activities

An activity has three status at any given time in the project.

- a) **Not Started**: The activity does not have an actual start date, and has not started. No action is needed at the time of regular update.
- **b) In Progress:** The activity has an actual start date but is not yet completed. At the time of monthly update project manager is required to input the following.
  - Actual Start Date
  - Either remaining duration or percent complete of the work.
  - Alternatively the project manager could also use Expected Finish Date.
    However, project manager must be careful ensure that expected finish date is always a future date in comparison to the data date (progress date).
- c) Completed: The activity which is started and completed within the update period. These activities will require both actual start and actual finish dates.
  Once the activity is marked completed or finished the percent complete of activity is 100% and no further changes are needed for the activity.

It is important that after completion of activity status; project manager should schedule (F9) the project to review updates in the project plan.