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Getting Started in P3: Basic Tips and Techniques

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WELCOME Ladies and Gentlemen





Focus of Presentation

- To give the occasional user or beginning scheduler a higher comfort level with the P3 software.
- To teach those basic skills needed to start using Primavera Project Planner for scheduling projects.
- To teach the tips and tricks to using the P3 software most effectively.





Aspects to be addressed

- 1. Capturing the overall project scope of work
- 2. Defining the Activity Codes structure
- 3. Establishing the Cost Accounts Codes structure
- 4. Defining the Resources
- 5. Establishing the Calendar ID structure
- 6. Creating activities and their relationships
- 7. Organizing activities



- 1. Capturing the overall project scope of work
- 1.1 Using the Contract
 - 1.1.1 Instructions to Bidders
 - 1.1.2 The Agreement (Contract Terms and Conditions)
 - 1.1.3 Project Schedule Requirements
 - 1.1.4 Special Provisions



1. Capturing the overall project scope of work

Figure 1.1.1: Instruction to Bidders

A Project description shall be provided, which illustrates the functional characteristics and particular features of the design, through text and drawings, in at least the detail indicated, for each of the Project elements below.

The Bidder shall provide a plan, which addresses how the final design and engineering, permitting, interface management, commissioning and testing will be completed within the constraints of the Project Schedule, while maintaining the railroad operation.



1. Capturing the overall project scope of work

Figure 1.1.2: The Agreement

The Project's scope of Work includes the design and construction of a new twin-track high-level fixed bridge over the South Fork of the New River, positioned within the existing right-of-way and approximately 1.7 miles of new twin-track alignment.



1. Capturing the overall project scope of work

Figure 1.1.3: Project Schedule Requirements

The Contractor shall at its own expense prepare, maintain and update detailed Project Schedules for the review and acceptance of (The Owner), all as described in this Section 5. The Project Schedules shall be prepared in such a manner as to permit the orderly planning, organization, and execution of the Work and shall be sufficiently detailed to accurately depict all the Work required for Final Acceptance and Revenue Ready Status. The Contractor's and Subcontractors' management personnel shall actively participate in its development and implementation.



1. Capturing the overall project scope of work

Figure 1.1.4: Special Provisions

(The Owner) has created a Work Breakdown Structure (WBS) for the Project. The WBS is intended to provide a hierarchy of work to be accomplished to complete the Project. The hierarchical structure subdivides all of the Work elements into successively smaller increments of Work. Each division of the Work is defined as a level. The number of levels is determined based on the necessary detail required to track the Project elements. The level of detail provides a breakdown of the Project which facilitates the Project team with tracking and monitoring Project progress. The WBS provides a hierarchical structure to segregate Project elements to facilitate the collection and analysis of Project Data and to serve as a mechanism for payment and scheduling for Project design, procurement and construction.





<u>1.2 Developing the Work Breakdown Structure</u> (WBS)

1.2.1 Levels

- Width number of characters
- Separators type of symbol

1.2.2 Codes

- Use typical abbreviations and standards
- Keep it simple







Screen 1.2: Opening the "WBS" dialog box

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AS112	Start-Up Line B	1	16MAR00	16MAR00	155							
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Screen 1.2.1:

Operating within the "WBS" dialog box - defining the WBS levels



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Screen 1.2.2:

Operating within the "WBS" dialog box - creating the WBS codes









2.1 Codes (category)

2.1.1 Name

- 2.1.2 Length
- 2.1.3 Description

2.2 Values (items within category)

2.2.1 Value Code

2.2.2 Description







Screen 2.: Opening the "Activity Codes" dialog box



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Screen 2.1:

Operating within the "Activity Codes" dialog box entering activity codes



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Screen 2.2:

Operating within the "Activity Codes" dialog box – entering activity code values



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3. Establishing the Cost Accounts Codes structure

3.1 Categories

3.1.1 Code

3.1.2 Category Title

3.2 Titles

3.2.1 Account Number

3.2.2 Account Title





3. Establishing the Cost Accounts Codes structure

Screen 3.:

Opening the "Cost Accounts" dialog box



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3. Establishing the Cost Accounts Codes structure

Screen 3.1: Operating within the "Cost Accounts" dialog

box – defining cost categories



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3. Establishing the Cost Accounts Codes structure

Screen 3.2: Operating within the "Cost Accounts" dialog box – defining cost accounts



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BA680	Form/Pour Concrete	10	11231		System Co	ontroller-Design			Form/Pour Conc	rete Footings	
BA681	Concrete Foundation Walls	10					_		Concret	e Foundation Walls	
BA690	Form and Pour Slab	5	+		[OK Ca	ancel He	elp	🗛 Form	and Pour Slab	
LABORER	Laborer-Construction		<u> </u>								
BA680	Form/Pour Concrete	10	11NOV99	24NOV99	0				Form/Pour Conc	rete Footings	
BA681	Concrete Foundation Walls	10	29NOV99	10DEC99	6				Concret	e Foundation Walls	
BA690	Form and Pour Slab	5	13DEC99	17DEC99	4				AT Form	and Pour Slab	
PLUMBER	Plumber										
BA660	Install Underground Water	5	04NOV99	10NOV99	0			A T Insta	all Underground W	later Lines	-
•					Þ						•
			Cos	t Codes Layou	t			All Activ	rities		
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PRIMAVERA* 21" ANNUAL CONFERENCE E C U T E A S P L A N N E D Getting Started in P3: Basic Tips & Techniques

4. Defining the Resources

4.1 Resources

<u>4.1.1 Resource Code</u>
4.1.2 Units
4.1.3 Driving
4.1.4 Base
4.1.5 Description

<u>4.2 Limits</u>
<u>4.3 Prices</u>







Screen 4.: Opening the "Resources" dialog box



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-+ - AS105	Project Codes		- Factor		1000		27AUG99 Fri
ACTIMITY ID ACTIMITY Description	WB5		Early Finish	Float	A SEP OCT 23,30,6,13,20,27,4,11,18,25,1	NOV DEC 8 15 22 29 6 13 20 2	JAN FEB 7,3,10,17,24,31,7,14,2
ELECTRCN Electrician	Resources						
AS315 Install Electrical Power	Cost Accounts	s p	9 01NOV99	156	V⊮	istall Electrical Power	
AS105 Install Temperature Cont o	Custors Data Ita	<u> </u>	9 01DEC99	157	A 1	🔤 🕹 İnstali Tem	perature Control Equipmer
BA670 Install Underground Elec	Custom Data Ite	ms	9 10NOV99	0	A 10 A 10 A 10 A 10 A 10 A 10 A 10 A 10	😾 Install Underground E	lectric Conduit
BA850 Install Wiring and Cable	15 5	10MAY	00 31 MAYOO	0			
BA901 Install Lighting Fixtures	3 5	12JUL	00 14JUL00	4			
ELEV Elevator Installer							
BA860 Install Elevator Rails and	15 5	17MAR	00 06APR00	42			
BA913 Install Elevator Cab and	2 5	08JUN	00 09JUN00	38			
EQUIPMNT Equipment-Crane		_					
BA680 Form/Pour Concrete	10 5	11NOV	99 24NOV99	0		Form/Pour Cor	crete Footings
BA681 Concrete Foundation Walls	10 5	29NOV	99 10DEC99	0		Concre	te Foundation Walls
BA690 Form and Pour Slab	5 5	13DEC	99 17DEC99	0		Eorr	n and Pour Slab
BA710 Erect Structural Frame	20 5	22DEC	99 20JAN00	0		_	Erect Structur
BA712 Floor Decking	14 5	21JAN	00 09FEB00	0			Floor
BA730 Concrete First and Second	15 5	10FEB	00 01MAR00	0			
BA731 Concrete Basement Slab	10 5	03MAR	00 16MAR00	0			
BA750 Brick Exterior Walls	28 5	17MAR	00 25APR00	0			
BA780 Insulation and Built-up	10 5	26APR	00 09MAY00	0			
EXCAVATR Excavator		_					•
				►			Þ
Budget Codes Constr Cost Custo	om Dates	Log F	Pred Res	Succ	WBS Help		
ID AS105 Install Temperature Contr	ol Equipment			Previous	Next More>>		
0D 20 Pct 0.0 Cal 5	ES 02NOV99	-	EF 01DE	C99 🔽	TF: 157		
RD 20 Type Task	LS 15JUN00	-	LF 13JU	.00 💌	FF: 0		
Defines resources with availability/prices		Resourc	es Layout		All Activ	ities	
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Screen 4.1:

Operating within the "Resources" dialog box – defining the resource



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- + - AS	105						30AUG99 Mon
Activity ID	Activity Description	Orig Dur	Cal Early ID Start	Early Finish	Total A SEP Float 23,30,6 13,20	1999 OCT NOV 27,4 ,11,18,25,1 ,8 ,15,22,29,6	DEC JAN FEB 13,20,27,3 ,10,17,24,31,7 ,14,2
ELECTRO	N Electrician						▲
AS315	Install Electrical Power	24	5 29SEF	99 01NOV99	156	Install Electrical	Power
AS105	Install Temperature Control	20	5 02NO	/99 01DEC99	157		stall Temperature Control Equipmer
BA670	Install Underground Electric	5	Resources			🚬 🗡 İnstall Under	ground Electric Conduit
BA850	Install Wiring and Cable	15	Resources:				
BA901	Install Lighting Fixtures	3	-+- FLD	ENG1			
ELEV Elev	ator installer	I	EQUIPMNT	Each 1	Equipment-Crane		
BA860	Install Elevator Rails and	15	EXCAVATR	Hrs 🗆 1	Excavator		
BA913	Install Elevator Cab and	2	FLD ENG1	Hrs 🗆 1	Field Eng-Senior		
EQUIPMNT	Equipment-Crane		FLD ENG3	Hrs 🗆 1	Field Eng-Assistant		
BA680	Form/Pour Concrete	10	FLRLYR	Hrs 🗆 1	Floor and Carpet Layer	Form/	Pour Concrete Footings
BA681	Concrete Foundation Walls	10	Limits:		Prices:	· · · · · · · · · · · · · · · · · · ·	Concrete Foundation Walls
BA690	Form and Pour Slab	5			25.00		Form and Pour Slab
BA710	Erect Structural Frame	20	Normal Max	Through	Price/Unit	Through	Erect Structur
BA712	Floor Decking	14	8	10	25.00		Floor
BA730	Concrete First and Second	15	0	Ō	0.00		
BA731	Concrete Basement Slab	10	0	0	0.00		
BA750	Brick Exterior Walls	28		0	0.00		
BA780	Insulation and Built-up	10	Transfer	Print	Calculate		
EXCAVATE	Excavator		Calendars		Close	Help	_
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Screen 4.2:

Operating within the "Resources" dialog box – defining the limits









Screen 4.3:

Operating within the "Resources" dialog box – defining the prices



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- + AS105												30AUG 99 M	lon	
Activity ID /	lctivity Description	Orig	Cal	Early	Early	Total	A SED	1	999 N		EC.	2000	EED	
		Dur	ID	Start	Finish	Float	23,30,6,13,20	27,4 ,11,18	25 1 8	15,22,29,6 1	3,20,27,	3 10 17 24	31,7 ,14,2	
ELECTRON EL	ectrician													•
AS315 Insta	II Electrical Power	24	5	29SEP99	01NOV99	156		4	Ninst	all Electrical P	ower			
AS105 Insta	II Temperature Control	20	5	02NOV99	01DEC99	157			<u> </u>	V insta	ill Tempe	rature Contro	l Equipmer	I
BA670 Insta	II Underground Electric	5	Resou	rces					×	Install Underg	round Ele	ctric Conduit		
BA850 Insta	II Wiring and Cable	15	<u>R</u> eso	urces:										
BA901 Insta	II Lighting Fixtures	3	╞╶╧	FLD EN	G1				- 1					
ELEV Elevator	Installer		EQU	esource Un IPMNT Ea	nts Driving Ba	Equip	Description		┥╸┝╴					-
BA860 Insta	II Elevator Rails and	15	EXC	AVATR H	rs 🗆 1	Exca	ator							
BA913 Insta	ll Elevator Cab and	2	FLD	ENG1 HI		Field E	ng-All Eng-Senior							
EQUIPMNT Eq	uipment-Crane		FLD	ENG2 HI ENG3 HI	rs 🗆 1	Field	Engineer Eng-Assistant							1
BA680 Form	/Pour Concrete	10	FLRI	YB H	rs 🗆 1	Floor	and Carpet Layer		I 🔼	Form/Po	our Concr	ete Footings		
BA681 Con	rete Foundation Walls	10	1.5-13-1				·	_			Concrete	Foundation V	valls	
BA690 Form	and Pour Slab	5				— F	25.00		-11		🐺 Form a	and Pour Slat	,	
BA710 Erec	t Structural Frame	20	Nor	mal Max	Through	_]b	Price/Unit	Through				Ere	ct Structur	
BA712 Floo	r Decking	14	t	8 10			25.00						Floor	
BA730 Con	rete First and Second	15	t	0 0			0.00							Í
BA731 Con	rete Basement Slab	10	t	0 0			0.00							
BA750 Brick	Exterior Walls	28		Uį Uį			0.00;							
BA780 Insu	ation and Built-up	10	1 Tr.	ansfer	Print	Carcura	ite							
EXCAVATE Ex	avator		Cal	endars			Close	Help						-
			i —										Þ	Γ
Budget Codes	Constr Cost Custo	m Dal	es	Log Pred	d Res	Succ	WBS Hel	lp						
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5.1 Calendars

- 5.1.1 Standard (daily information)
- 5.1.2 Holidays
- 5.1.3 Work periods/Non-work periods

5.2 Assigning

- 5.2.1 To activities
- 5.2.2 To resources







View Insert Format Tools

Data Window Help

Screen 5.:

Opening the "Calendar ID" dialog box



- +	IA400	Dusiash	Codes.									2	:7AUG99 F	fri	
Activity ID	Activity Description	WBS	Coues	· [Early		SED	19: OCT	99 NOV	DEC	JAN	2000 EEB		-
						Finish	23,30	6 13 20	27.4 11.18.2	5 1 8 15 22	29 6 13 20 27	7,3,10,17,2	4,31,7,14	21,28	6
5 5-day w	/eek w/h	Resour	ces												ļ
BA400	Design Building Addition	Cost A	ce curve ccounts.		A	27AUG99A	∠ D	esign Build	ing Addition						
AS100	Define System				A	04AUG99A	Syste	m Require	ments						
AS101	System Design	Custon	n Data Ite	ems	A	31AUG99A	T 🔫	System De	sign						
AS204	Prepare Drawings for Temp	10	5	17AUG9	9A	31AUG99A	T - Ý	Prepare D	awings for Te	mp Control Equ	lipment				
AS216	Prepare Drawings for	10	5	23AUG9	19A	01OCT99			💙 Prepare Di	awings for Sy	stem Controller				
BA501	Review and Approve	14	5	30AUG9	19A	20SEP99A	4	V R	eview and App	rove Designs					
AS102	Approve System Design	10	5	31AUG9	19A	13SEP99A	1 本	📕 Аррг	ove System D	esign					
AS205	Review and Approve Temp	5	5	31AUG9	19A	13SEP99A	1 🔺	Revi	ew and Approv	e Temp Contro	el Equipment				
AS200	Prepare and Solicit Bids for	5	5	07SEP9	9A	16SEP99A		A Pre	pare and Solid	it Bidsfor Terr	p Control Equip	•			
AS240	Installation Begins	0	5	14SEP9	9A			F⁼insta	llation Begins						
AS310	Site Preparation	10	5	14SEP9	9A	28SEP99			🗸 Site Prepara	ation					
AS201	Review Bids for Temp	2	5	20SEP9	19A	21SEP99A		/ R	eview Bids for	Temp Control	Equipment				
BA450	Assemble Brick Samples	10	5	20SEP9	9A	01OCT99			🛶 Assemble	Brick Samples					
BA630	Begin Building	0	5	21SEP9	19A			фВ	egin Building (Construction					
AS202	Award Contract for Temp	1	5	21SEP9	19A	21SEP99A		<u>_</u> 4	ward Contrac	t for Temp Con	trol Equipment				
BA480	Assemble and Submit	10	5	21SEP9	9A	050CT99		4	Assembl	e and Submit F	looring Sample	s			
BA640	Site Preparation	20	5	21SEP9	9A	200CT99			si 🗸 si	te Preparation					
AS206	Fabricate & Deliver Temp	20	5	22SEP9	19A	180CT99			Fal	oricate & Delive	er Temp Contro	l Equipment			
BA469	Assemble Technical Data	3	5	27SEP	99	29SEP99		4	🗸 Assemble 1	echnical Data	for Heat Pump				
AS104	Run Sealant, Air, and Water	13	5	29SEP	99	150CT99			A Run	Sealant, Air, a	nd Water Piping	,			
AS103	Install Robot Base	18	5	29SEP	99	220CT99			<u>∧</u> ı	nstall Robot Ba	se				
A8315	Install Electrical Power	24	5	29SEP	99	01NOV99			4	🛶 Install Elec	trical Power				
BA470	Review Technical Data on	10	5	30SEP	99	130CT99			A Revie	w Technical D	ata on Heat Pu	nps			
BA530	Review and Approve Brick	10	5	040CT	99	150CT99			A V Revi	ew and Approv	e Brick Sample	es	1		, Î
Defines calen	idars and holidays			Calenda	r ID	Lavout				All Activitie	1S				-
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Screen 5.1:

Operating within the "Calendar ID" dialog box – adding a calendar







Screen 5.2:

Operating within the "Calendar ID" dialog box – assigning to resources



_ 8 × _ 8 × **6 8 8 8** 8 8 8 8 - + Design Building Addition 27AU699 Fri Activity ID Activity Description Oria Cal Early Early Dur ID Start Finish 5 5-day week w/h -Design Building Addition 19JUL99A 27AUG99 AS100 Define System 10 Calendars X System Desian 20 Resource Base AS204 Prepare Drawings for Tem 10 Equipment AS216 Prepare Drawings for 10 Holidays... System Controller Resource 14 Review and Approve ACCTS 1 = Standard 5-da Standard... ANALYS' 1 = Standard 5-day AS102 10 Approve System Design ATM ENG 1 = Standard 5-day Review and Annrove Term -5 ntrol Equipment AS200 Prepare and Solicit Bids fo Femp Control Equip -5 SUN MON TUE WED THU FRI SAT AS240 Installation Regins 0 2 1 3 AS310 Site Preparation 10 4 5 6 8 9 10 7 AS201 Review Bids for Temp 2 trol Equipment 11 12 13 14 15 16 BA450 10 17 Assemble Brick Samples bles BA630 Beain Buildina 0 19 18 20 21 22 23 24 Award Contract for Temp 1 Control Equipment 25 26 27 28 29 30 31 Assemble and Submit 10 nit Flooring Samples Site Preparation 20 tion abricate & Deliver Temp 20 Nonwork eliver Temp Control Equipment BA469 Assemble Technical Data 3 ata for Heat Pump Print... Close Help AS104 Run Sealant, Air, and Wate r, and Water Piping AS103 Install Robot Base 18 29SEP99 22OCT99 7 Install Robot Base Install Electrical Power 24 29SEP99 01NOV99 Install Electrical Power BA470 Review Technical Data on 30SEP99 130CT99 Review Technical Data on Heat Pumps BA53 Review and Approve Brick 10 040CT991150CT99 Review and Approve Brick Samples ١Ē Calendar ID Layout All Activities 🔯 Inbox - Microsoft Out... | 🛅 Microsoft PowerPoint... | 📴 Primavera Project ... 🐕 Primavera Project Pla... | 🙀 🕅 💭 🖏 🕚 🔩 10:10 AM 🏄 Start 🧉 🖾 🖸 🖪 🐨 🕑 📀





- 6. Creating activities and their relationships
- 6.1 Adding New activities
 - 6.1.1 Assigning Activity ID and Name
 - 6.1.2 Assigning Calendar ID and Original Duration
 - 6.1.3 Assigning Predecessors and Successors
- 6.2 Assigning the WBS
- 6.3 Assigning Activity Codes







- 6.4 Assigning Resources
- 6.5 Assigning Cost Accounts







Screen 6.1: Adding Activities

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Resource Assignment	06SEP99 Mon
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Clear All Page Breaks	
SYS1 System In Object	
AS240 Induction Region Advantage 14SEP99A	
AS310 Site Preparation 10 14SEP99A 28SEP99 165 Arr Site Preparation	
AS104 Run Sealant, Air, and Water 13 29SEP99 150CT99 174	Piping
AS103 Install Robot Base 18 29SEP99 22OCT99 161	
AS315 Install Electrical Power 24 29SEP99 01NOV99 155	ver
AS105 Install Temperature Control 20 02NOV99 01DEC99 155	Temperature Control Equipment
AS106 Set & Connect Robots 18 02DEC99 28DEC99 155	Set & Connect Robots
AS107 Install System & Misc. 30 29DEC99 09FEB00 155	∕Vinstall Sy
AS108 Install System Controller 16 10FEB00 03MAR00 165	
AS109 Test & Debug Line A 24 10FEB00 15MAR00 155	
AS110 Test & Debug Line B 24 10FEB00 15MAR00 155	Δ
AS270 Trim Robot Paths Line B 24 10FEB00 15MAR00 155	
AS250 Install Bar Rails 20 17FEB00 16MAR00 165	
AS260 Trim Robot Paths Line A 15 24FEB00 15MAR00 155	
AS111 Pilot Start Line A 1 16MAR00 16MAR00 155	•
Budget Codes Constr Cost Custom Dates Log Pred Res Succ WBS Help	
ID Previous Next < <less< th=""><th></th></less<>	
0D 0 Pct 0.0 Call FES FEF FFF TF:	
RD 0 Type LS V LF V FF:	
Dept Resp Phas Step Item WBS	
Inserts a new activity Codes Layout All Activities	
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Screen 6.1.1: Assigning Activity ID and Activity Name



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	20					
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		Dur	Start	Finish	Float	A SEP OCT NOV DEC JAN FEB M 23.30.6 13.20.27.4 11.18.25.1 8 15.22.29.6 13.20.27.3 10.17.24.31.7 14.21.28
SYS1 System	n Integration Phase I					
AS240	Installation Begins	0	14SEP99A			Painstallation Begins
AS310	Site Prenaration	10	14SEP99A	28SEP99	156	Site Preparation
AS320		1	27SEP99	27SEP99	0	
	Dum Occulent, etc. and letters	40	0005500	4500700	4.70	🗸 Run Sealant, Air, and Water Piping
AS103	Install Robot Base	18	29SEP99	220CT99	162	/Install Robot Base
AS315	Install Electrical Power	24	29SEP99	01NOV99	156	A Install Electrical Power
AS105	Install Temperature Control	20	02NOV99	01DEC99	157	A Install Temperature Control Equipment
AS106	Set & Connect Robots	18	02DEC99	28DEC99	157	Set & Connect Robots
AS107	Install System & Misc.	30	29DEC99	09FEB00	157	Install \$y
AS108	Install System Controller	16	10FEB00	02MAR00	167	
AS109	Test & Debug Line A	24	10FEB00	14MAR00	157	
AS110	Test & Debug Line B	24	10FEB00	14MAR00	157	
AS270	Trim Robot Paths Line B	24	10FEB00	14MAR00	157	
AS250	Install Bar Rails	20	17FEB00	15MAR00	167	
AS260	Trim Robot Paths Line A	15	24FEB00	15MAR00	156	
AS111	Pilot Start Line A	1	16MAR00	16MAR00	156	
IIAS112	IStart-Up Line B	1	I 16MAR00	116MAR00	1 156	
But and the set				- Purel	S S	Succ WBS Help
ID AS320					re	revious Next < <less< td=""></less<>
UU 1 Pa		.5 275	EPSS V	I EF	275899	3 🔽 TF: 0
RD 1 Ty	vpe Task	LS 275	EP99 👻	LF	27SEP99	9 🔽 FF: 0
ISD MILLS	SYS1					
Dept Resp	Phas Step	Item	WB	S		
			Add	Activity Layou	ıt	All Activities
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Screen 6.1.2: Assigning Calendar ID and Original Duration

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	<u> M O</u>	<u> 8</u>		h 🖪 📩		7 🚣 📠		2	
-+ AS320									10SEP99 Fri
Activity ID Activity Description	Orig	Early	Early	Total	A SEP	1999 OCT	NOV	DEC	JAN FEB M
SVC4. Sustem Integration Discos I	Dur	Start	Finish	Hoat	23,30,6,13,20,	27,4 ,11,18,25	22, 15, 8 <mark>, 1</mark>	29,6 ,13,20,2	27,3 ,10,17,24,31,7 ,14,21,28
AS240 Installation Begins		14SEP99A			P≏ineta	llation Begins			
AC210 Cito Proportion	10	1400000	2005500	150	-	Cite Desparat			
Sile Treparation	10	14021338	20011-33	130		y site Preparau	on		
A\$320	1	27SEP99	27SEP99	U		Z			
AS104 Run Sealant, Air, and Water	13	29SEP99	150CT99	176		Run S	ealant, Air, a	nd Water Pipir	ng 👘
AS103 Install Robot Base	18	29SEP99	220CT99	162		∕V Ins	tall Robot Ba	nse	
AS315 Install Electrical Power	24	29SEP99	01NOV99	156		<u>^</u>	🗸 install Elec	trical Power	
AS105 Install Temperature Control	20	02NOV99	01DEC99	157			<u></u>	📩 Install Tem	perature Control Equipment
AS106 Set & Connect Robots	18	02DEC99	28DEC99	157					Set & Connect Robots
AS107 Install System & Misc.	30	29DEC99	09FEB00	157	-			T	Install Sy
AS108 Install System Controller	16	10FEB00	02MAR00	167					
AS109 Test & Debug Line A	24	10FEB00	14MAR00	157					Δ
AS110 Test & Debug Line B	24	10FEB00	14MAR00	157					
AS270 Trim Robot Paths Line B	24	10FEB00	14MAR00	157					
AS250 Install Bar Rails	20	17FEB00	15MAR00	167					
AS260 Trim Robot Paths Line A	15	24FEB00	15MAR00	156					
AS111 Pilot Start Line A	1	16MAR00	16MAR00	156					
AS112 Start-Up Line B	1	16MAR00	16MAR00	156				1	
Budget Codes Constr Cost Custo	m Date	s Log	Pred	Res Si	JCC WBS	Help			
ID AS320			/	Pre	vious Next	< <less< td=""><td></td><td></td><td></td></less<>			
	EC 2700			2705 000		0			
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RD 1 Type Task	LS 2756	-Paa	LF	275EP99	FF:	U			
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Dept Resp Phas Step	Item	WB	s						
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Screen 6.1.3: Establishing "Predecessor" and "Successor" relationships









Screen 6.2: Assigning the WBS

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- + - AS3	20												060CT	99 Wed
Activity ID	Activity Description	Orig	Early	Early	Total		CED.	_	1999	NOV		DEC	200	00
		Dur	Start	Finish	Float	23,30,6	SEP 13,20	27,4	11,18,25	1 8 15	22,29	6 13,20,2	7,3,10,17,24,3	1,7 ,14,21,28
ISD Informa	tion Systems Departme	ent												
MILLS Tom	Mills - Director of Hardwa	re Engi	neering											
SYS1 System	Integration Phase I		44050004	1	T T		-							
A5240	Installation Begins	0	145EP99A				⊢ -Insta	llation	Begins					
AS310	Site Preparation	10	14SEP99A	28SEP99	156		Δ	Site ∣	Preparati	on				
AS320		1	27SEP99	27SEP99	0		1	T						
AS104	Run Sealant, Air, and Water	13	29SEP99	150CT99	176			4	😽 Run S	ealant, Air	r, and V	Nater Piping	g	
AS103	Install Robot Base	18	29SEP99	220CT99	162			<u> </u>	/Ins	tall Robot	Base			
AS315	Install Electrical Power	24	29SEP99	01NOV99	156	Ĩ	WBS				×	al Power		
AS105	Install Temperature Control	20	02NOV99	01DEC99	157			_			_	nstall Temp	erature Contro	Equipment
AS106	Set & Connect Robots	18	02DEC99	28DEC99	157		<u>W</u> BS					<u> </u>	Set & Connect	tobots
AS107	Install System & Misc.	30	29DEC99	09FEB00	157		Title:	AM - /	Acme Moto	v rs Expansio	n Proje	ide st	-	🔟 install Sy
AS108	Install System Controller	16	10FEB00	02MAR00	167			AM.01 AM.01	1 - Automat 1.1 - Design	ed System n Engineerir	ng			Δ
AS109	Test & Debug Line A	24	10FEB00	14MAR00	157			AM.0 AM.0	1.2 - Syster 1.2.A - Terr	n Engineerir perature Co	ng ontrol Ec	uipment	Ī	Δ
AS110	Test & Debug Line B	24	10FEB00	14MAR00	157			AM.01	1.2.B - Rob	ot Controlle	r er			Δ
AS270	Trim Robot Paths Line B	24	10FEB00	14MAR00	157			AM.0	1.3 - Softwi 1.4 - Trainir	are Enginee	ring			Δ
AS250	Install Bar Rails	20	17FEB00	15MAR00	167			AM.0	1.4.A - Mar	iuals				
AS260	Trim Robot Paths Line A	15	24FEB00	15MAR00	156					-		_		
					Þ									Þ
Budget Code:	s Constr Cost Custon	n Dati	es Log	Pred	Res Su	ucc W	/BS	Help]					
ID AS320						ок с	ancel	< <less< td=""><td>]</td><td></td><td></td><td></td><td></td><td></td></less<>]					
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	pe Task	LS 275	EP99 🗸	LF	27SEP99	1	FF:	0						
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Screen 6.3: Assigning the Activity Codes

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Activity ID	Activity Description	Orig	Early	Early	Total	199	9	2000
		Dur	Start	Finish	Float 23	30,6,13,20,27,4,11,18,25	1 8 15 22 29 6 13 20 2	<u>JAN FEB M</u> 7,3 ,10,17,24,31,7 ,14,21,28
ISD Inform	nation Systems Departme	ent						
MILLS Ton	n Mills - Director of Hardwa	re Engir	neering					
AS240	Installation Phase I	0	14SEP99A		T T			
A9210	Rite Brenaration	10	14000000	20055000	168	Cito Droporo		
A0310	Site Preparation	10	140EF 35A	200EF 33	156		ion	
AS320		1	27SEP99	27SEP99	U	÷ 📲		
AS104	Run Sealant, Air, and Water	13	29SEP99	15OCT99	176	Run S	ealant, Air, and Water Pipin	9
AS103	Install Robot Base	18	29SEP99	220CT99	162	in 🗸 🔤 🗸 In	stall Robot Base	
AS315	Install Electrical Power	24	29SEP99	01NOV99	156	<u> </u>	🖓 Install Electrical Power	
AS105	Install Temperature Control	20	02NOV99	01DEC99	157		🛆 Install Temp	erature Control Equipment
AS106	Sat & Connect Roboto	19	0205000	2905000	167	<u>:</u>	<u> </u>	Set & Connect Robots
AS107	Activity Codes			1				Install Sv
AS108	ISD						_	
49109	Code Value I	Description	1					
10100	DEPT ISD In BESP MILLS T	formation \$ om Mills - F	Systems Depar Director of Harc	tment Iware Engineer	ing.			
48110	PHAS SYS1 S	ystem Integ	gration Phase I	indio Enginooi				Δ
AS270								
AS250								
AS260					_			
					▶ ◀			È.
Budget Coo	des Constr Cost Custor	n Date:	s Log	Pred	Res Succ	WBS Help		
ID AS32	20				Previous	Next < <less< td=""><td></td><td></td></less<>		
	Pot 0.0 Call 01	S 275E	P99 🗸	EF	27SEP99	TF: 0		
BD 1	Tupe Task	15 2755	P99	LE	275EP99	- - - -		
	1360 Light	20 12/00			12102100			
ISD MILLS	6 SYS1							
Dept Resp	Phas Step	ltem	\ B	S				
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Screen 6.4: Assigning Resources

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- + - AS1	05							1000		19	SEP99 Sun	
Activity ID	Activity Description	Orig	Early	Early	Total	A	SED OC	1999 T NOV		- 1851	2000	
AS315	Install Electrical Power	24	29SEP99	01NOV99	156	23,30,6	Resources					
AS105	Install Temperature Contr	ol 20	02NOV99	01DEC99	157		Resources:					_ _
AS106	Set & Connect Robots	18	02DEC99	28DEC99	157		Resource	Units Driving	Base Descript	ion		-
AS107	Install System & Misc.	30	29DEC99	09FEB00	157		ELEV EQUIPMNT	Hrs 🗆 1 Each 🗆 1	Elevator Insta Equipment-Cr	ller ane		≜ y
AS108	Install System Controller	16	10FEB00	02MAR00	167		EXCAVATR	Hrs 🗆 1	Excavator			
AS109	Test & Debug Line A	24	10FEB00	14MAR00	157		FLD ENGI	Hrs D 1	Field Eng-Ser	ior		
AS110	Test & Debug Line B	24	1055800	1.4MAR00	167		FLD ENG3	Hrs 🗆 1	Field Eng-Ass	istant		
AS270	Resources					• ×	,	, , <u> </u>				
AS250	- + FLD ENG1						Limits:		Prices:			
AS260	Hesource FLD Cost Acct/Category 1121	ENG1 3 L	11213	L	11213 L			3 Through	Price //	25.00	Through	- 6
AS111	Driving						8	10 10	FICE/	25.00	Thiough	-
AS112	Units per day		10.00	4.00		10.00	0	0		0.00		
AS265	Budgeted quantity Res Lag/Duration		00.00	80.00		200.00	Ő	Ö		0.00		
AS275	Percent complete		0.00	0.00		0.00		0		0.00		
SVS2 Svet	Actual to date		0.00	0.00		0.00	T (
AS114	To complete At completion	2	00.00 10.00	80.00		200.00	I ransrer	Print				
INSTL Inst	Variance (units)		0.00	0.00		0.00	Calendars	1	[Close	Help	1 F I
CS311 -	Early start 02NC Early finish 01DE	C99	02NOV99) (J2NOV99 D1DEC99			-				
CS315	Late start 15JU	N00	15JUN00		15JUN00							
CS700			130000	I	130000							
								1	:) i C
Budget Codes	s Constr Cost Cus	tom Date	es Log	Pred	Res S	ucc WE	3S Help					
ID AS105	Install Temperature Con	trol Equipme	nt		Pre	vious N	ext More>>					
DD 20 Pc	t 0.0 Cal5 F	ES 02N	0V99 🗸	EF EF	01DEC99	-	TF: 157					
RD 20 Ty	pe Task	LS 15J		LF	13JUL00	-	FF: 0					
			Add	Activity Layou	.ıt			All Activit	ies			
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Screen 6.5: Assigning Cost Accounts

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- + - AS1	05							1	9SEP99 Sun	
Activity ID	Activity Description	Orig Earl	Early	Total	Resource	25			×	M
		Dur Star	Finish	Float	23,3					1,28
AS315	Install Electrical Power	24 29SE	P99 01NOV99	156	<u>H</u> esourc					
AS105	Install Temperature Control	20 02NC	V99 01DEC99	157	Besc	urce Units Drivi	ing Base Descri	ation		nt
AS106	Set & Connect Robots	18 02DE	C99 28DEC99	157	EQUIP	4NT Each	I 1 Equipment C	ìrane	<u> </u>	
AS107	Install System & Misc.	30 29DE	299 09FEB00	157	FLD EN	lG* Hrs ⊡	I I Excavator I 1 Field Eng-All			ll Sy
AS108	Install System Controller	16 10FE	800 02MAR00	167	FLD EN	G1 Hrs G2 Hrs	I 1 Field Eng-Se I 1 Field Engine	enior er		
AS109	Test & Debug Line A				FLD EN	G3 Hrs 🗆	I 1 Field Eng-As	sistant		
AS110	Test & Debug Line B		D ENG1		IFLRLYF	i Hrs i L	I [1]Floor and Ca	irpet Layer	•	
AS270	Trim Robot Paths Line B	Resource	FLD E	NG1	Limits:		Prices:			
AS250	Install Bar Rails	Driving	egory 11213			→ \$		25.00		
Cost		Curve		10.0	Norma	Max Th	rough Price.	/Unit Thro	bugh	
	D ENG1	Budgeted qu	ntity	200.0	00 00 00			0.00		
Resource	FLD ENG1 H	Res Lag/Dur Percept.com	ition	0		0 0		0.00		
Cost Acct/Ca	tegory 11213 L 1	- Actual this pe	iod	0.0	DO	0 0		0.00		
Curve		Actual to date		200.0	<u>001</u>	0 0		0.00		
Budgeted co: Actual this pe	tiod 0.00	At completion		200.0	DO Trans	fer Print	Calculate			
Actual to date	0.00	Variance (uni Early start	sj 02NO\	U.U /99						
Percent expe	nded U.U.	Early finish	01DEC	.99	Caleno	dars		Close	Help	
Earned value	0.00	Late start Late finish	13,01	00				1		
At completion	5000.00 5000.00									-
Variance	0.00	-								
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<u>ца</u> ,				<u>`</u>						
Budget Code:	s Constr Cost Custon	n Dates Lo	g Pred	Res Su	icc WBS	Help				
ID AS105	Install Temperature Control	Equipment		Prev	vious Next	More>>				
0D 20 Pc	t 0.0 Cal 5 🗆 E	ES 02NOV99	▼ □ EF	01DEC99	TF:	157				
RD 20 Ty	pe Task	LS 15JUN00	- LF	13JUL00	▼ FF:	0				
			Add Activity Layo	ut			All Activities			
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7. Organizing activities

7.1 Organize by

7.2 Group by

7.3 Sort by

7.4 Filtering







Screen 7.: Opening the "Organize" dialog box



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- + - AS1	05	Bars C	tri+F11								24AUG99 Tue
Activity ID	Activ	Summary Bars		Early Start	Early Finish	Total Float	A 23,30,6	SEP	1999 OCT NOV 11,18,25,1,8,15,22,29	DEC	2000 JAN FEB M 3 1017,24,31,7 14,21,28
ISD Informa	tion Sy	Organize									-
MILLS Tom	Mills - Di	Filter		e ring							
AS240	Installati	Run Filter Now		1 SEP994			_		Bogine		
A0210	Rito Prov	Summarize		CEDODA	2005000	166	_	- Installation	Degins		
10101		Summarize All		OCT DOG	2002735	150	_		Preparation		
AS104	Run Sea	Timescale		9SEP99	1500199	176		<u> </u>	Run Sealant, Air, and	Water Piping	
AS103	Install R	Sight Lines		9SEP99	22OCT99	162			Install Robot Base		
AS315	Install El	Row Height		9SEP99	01NOV99	156		<u> </u>	Install Electric	al Power:	
AS105	Install Te	Screen Colors		2NOV99	01DEC99	157			<u>λ</u> γ	Install Temp	erature Control Equipment
AS106	Set & Co	Fonts		2DEC99	28DEC99	157			Δ	<u> </u>	Set & Connect Robots
AS107	Install S	Dates		9DEC99	09FEB00	157	-				Install Sy
AS108	Install Sy	stern Controller	16	10FEB00	02MAR00	167	_				
AS109	Test & De	ebug Line A	24	10FEB00	14MAR00	157	-				
AS110	Test & De	ebuq Line B	24	10FEB00	14MAR00	157	_				
AS270	Trim Roh	ot Paths Line B	24	1055800	14MAR00	157	-				
49250	Install Ba	r Raile	20	1755800	15MAR00	167	_				
48260	Trim Roh	ot Paths Line A	15	2455800	15MAR00	156	_				
A0111	Dilot Stor	Ling A	1	16MAD00	16MAD00	156	_				<u>∆</u>
Aarri	Filot Stan	Line A	'	TOWAROU	TOWAROU	156					
				1 . 1					1		<u> </u>
Budget Lodes	: Lonstr	Lost Luston	n Dates	Log	Pred	Hes S	Succ W	/BS Help	1		
ID AS105	Insta	II Temperature Contro	l Equipment			Pr	evious	Next < <less< td=""><td></td><td></td><td></td></less<>			
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han function	,	. 1	, Iunai		~ ~ ~	<u> </u>	Long Land				
ISD MILLS	SYS	1	IHRDV	WH AM	.01.2.A						
Dehr Desb	r nas	. step	nem	WB	5						
Determines activit	ty order/grou	uping		Activ	vity Codes La	yout			All Activities		
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Screen 7.1: Operating within the "Organize" dialog box – "Organize by" function



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→ + ▼ AS105	24AUG99 Tue
Activity ID Activity Description Orig Early Early Total	2000
Dur Start Finish Float 23,30,6,13,20,27,4,11,18,25,1,8,15,22,29,6,13,20	0,27,3,10,17,24,31,7,14,21,28
ISD Information Systems Department	
MILLS Tom Mills - Director of Hardware Engineering	
SYS1 System Integration Phase I Organize	
AS240 Installation Begins	
AS310 Site Preparation Urganize by	
AS104 Run Sealant, Air, and V CActivity data item	ping
AS103 Install Robot Base	
AS315 Install Electrical Power	r –
AS105 Install Temperature Co Department Ascend Arial,11,8 Department Ascend Arial,11,8	emperature Control Equipment
AS106 Set & Connect Robots Responsibility AscendiArial.10.B None None None None	Set & Connect Robots
AS107 Install System & Misc.	<u>∧</u> √Install Sy
AS108 Install System Controlle	
AS109 Test & Debug Line A Display all values in one band Sort by:	Δ
AS110 Test & Debug Line B Reorganize automatically	
AS270 Trim Robot Paths Line Display unassigned and uncategorized activities Sort on Order	A
AS250 Install Bar Rails Sample Early start Ascend Ascend	
AS260 Trim Robot Paths Line Total float Ascend	
AS111 Pilot Start Line A	-
	i i i
Budget Codes Constr Cost C	
ID AS105 Install Temperature C Options Organize Now Cancel Help	
0D 20 Pct 0.0 Cal 5 ES UZNUV99 V EF UIDEL39 V IF: 157	
RD 20 Type Task LS 15JUN00 V LF 13JUL00 V FF: 0	
ISD MILLS (SYS1 HBDW/B (AM 01.2.4	
Dept Resp Phas Step Item WBS	
Activity Codes Layout All Activities	
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Screen 7.2: Operating within the "Organize" dialog box – "Group by" function









Screen 7.3: Operating within the "Organize" dialog box – "Sort by" function



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ACUMIYID	Activity Description	Dur Start	Early	Float A	SEP	20.27.4	OCT	NOV	DEC	JAN FEB M	
ISD Informa	tion Systems Depar	tment		231	;	2012714	11,10,23	1 10 113 22 29 0	15,20,2		
MILLS Tom	Wills - Director of Hard	lware Engineering								1	
SYS1 System	Integration Phase I	Organize		-					<1		
AS240	Installation Begins	organice						-			
AS310	Site Preparation	Organize by									
AS104	Run Sealant, Air, and W	Activity data item C Work breakdown								g	
AS103	Install Robot Base	Group by:						_			
A8315	Install Electrical Power	-+-		F					ower		1
AS105	Install Temperature Co	Department	Urder Ascend Arial.11.8	Font Bkg	rnd lext	vew page	lotal		all Tem	erature Control Equipment	
AS106	Set & Connect Robots	Responsibility	Ascend Arial, 10, B			N.	lone			Set & Connect Robots	
AS107	Install System & Misc.	1 11050	Ascend, Anal, 5,5				ione			Install Sy	
AS108	Install System Controlle							-			
AS109	Test & Debug Line A	Display all values in		Sort bu							
AS110	Test & Debug Line B	Beorganize automa									
AS270	Trim Robot Paths Line	Display unassigned	and uncategorized	activities		Sort o	m	Order			
AS250	Install Bar Rails	Sample			Early	start		Ascend Ascend			
AS260	Trim Robot Paths Line				Tota	l float		Ascend			
AS111	Pilot Start Line A										
•										i i	1
Budget Codes	Constr Cost C										
ID AS105	Install Temperature C	Options			Org	anize Now	Cano	el Help			
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Dept Resp	Phas Step	Item	WBS								
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Screen 7.4: Opening the "Filter" dialog box









Screen 7.4-a:

Operating within the "Filter" dialog box – modifying an existing filter







Summary

- 1. WBS
- 2. Activity Codes
- 3. Cost Accounts Codes
- 4. Resources
- 5. Calendar ID
- 6. Creating Activities
- 7. Organizing Activities





QUESTIONS?





THANK-YOU Ladies and Gentlemen



Suggested Resources

- Construction Scheduling with Primavera Project Planner, 2nd edition by Leslie Feigenbaum
- Project Scheduling and Management for Construction by David R. Pierce
- Project Scheduling Handbook
 by Jonathan F. Hutchings



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