Getting Started in P3: Basic Tips and Techniques

Beverley M. Sheafer
Assistant Professor, CSUS
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
Getting Started in P3: Basic Tips & Techniques

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.
1. Capturing the overall project scope of work

1.2 Developing the Work Breakdown Structure (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
1. Capturing the overall project scope of work

Screen 1.2: Opening the “WBS” dialog box
1. Capturing the overall project scope of work

Screen 1.2.1: Operating within the “WBS” dialog box - defining the WBS levels
1. Capturing the overall project scope of work

Screen 1.2.2:
Operating within the “WBS” dialog box - creating the WBS codes
2. Defining the Activity Codes structure

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
2. Defining the Activity Codes structure

Screen 2.: Opening the “Activity Codes” dialog box
2. Defining the Activity Codes structure

Screen 2.1: Operating within the “Activity Codes” dialog box - entering activity codes
2. Defining the Activity Codes structure

Screen 2.2: Operating within the “Activity Codes” dialog box – entering activity code values
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
3. Establishing the Cost Accounts Codes structure

Screen 3.1:
Operating within the “Cost Accounts” dialog box – defining cost categories
3. Establishing the Cost Accounts Codes structure

Screen 3.2: Operating within the “Cost Accounts” dialog box – defining cost accounts
4. Defining the Resources

4.1 Resources

4.1.1 Resource Code
4.1.2 Units
4.1.3 Driving
4.1.4 Base
4.1.5 Description

4.2 Limits

4.3 Prices
4. Defining the Resources

Screen 4.: Opening the “Resources” dialog box
4. Defining the Resources

Screen 4.1: Operating within the “Resources” dialog box – defining the resource
4. Defining the Resources

Screen 4.2: Operating within the “Resources” dialog box – defining the limits
4. Defining the Resources

Screen 4.3:
Operating within the “Resources” dialog box – defining the prices
5. Establishing the Calendar ID structure

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
5. Establishing the Calendar ID structure

Screen 5.:
Opening the “Calendar ID” dialog box
5. Establishing the Calendar ID structure

Screen 5.1: Operating within the “Calendar ID” dialog box – adding a calendar
5. Establishing the Calendar ID structure

Screen 5.2:
Operating within the “Calendar ID” dialog box – assigning to resources
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. Creating activities and their relationships

6.4 Assigning Resources
6.5 Assigning Cost Accounts
6. Creating activities and their relationships

Screen 6.1: Adding Activities
6. Creating activities and their relationships

Screen 6.1.1: Assigning Activity ID and Activity Name
6. Creating activities and their relationships

Screen 6.1.2: Assigning Calendar ID and Original Duration
6. Creating activities and their relationships

Screen 6.1.3:
Establishing “Predecessor” and “Successor” relationships
6. Creating activities and their relationships

Screen 6.2: Assigning the WBS
6. Creating activities and their relationships

Screen 6.3:
Assigning the Activity Codes
6. Creating activities and their relationships

Screen 6.4: Assigning Resources
6. Creating activities and their relationships

Screen 6.5: Assigning Cost Accounts
7. Organizing activities

7.1 Organize by
7.2 Group by
7.3 Sort by
7.4 Filtering
7. Organizing activities

Screen 7.: Opening the “Organize” dialog box
7. Organizing activities

Screen 7.1: Operating within the “Organize” dialog box – “Organize by” function

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7. Organizing activities

Screen 7.2:
Operating within the “Organize” dialog box – “Group by” function
7. Organizing activities

Screen 7.3:
Operating within the “Organize” dialog box – “Sort by” function
7. Organizing activities

Screen 7.4: Opening the “Filter” dialog box
7. Organizing activities

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
Contact Information

Beverley M. Sheafer  
Assistant Professor  
Construction Management Program

CSU, Sacramento  
6000 J Street, Sacramento CA 95819-6029

Office - 916-278-5349  
Email - sheaferb@ecs.csus.edu