Oracle
Construction Intelligence Cloud Advisor
P6 EPPM Cloud Application Setup Guide

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Oracle Construction Intelligence Cloud Advisor P6 EPPM Cloud Application Setup Guide

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Contents

Getting Started

This chapter provides a brief overview and a high-level process flow for setting up your P6 EPPM Cloud service to work with CIC.

In This Section

Overview

CIC can be configured to display projects managed in P6 EPPM cloud service application.

To connect CIC with your P6 EPPM cloud service you have to setup the following applications as listed in the order listed below:

1) Primavera Administration Application to connect to the Primavera Portal application to access your cloud applications.
2) P6 EPPM application you wish to connect with CIC.
3) CIC Administration application to manage CIC Advisor.

For more details, see the **CIC Application Setup Process** (on page 5) which provides a high-level overview of where you are currently positioned in the setup sequence.

After setting p all application listed above, you can then view P6 projects in CIC.

This guide describes how to setup P6 EPPM for CIC. After completing the setup outlined in this guide, use the *CIC Advisor Administration Guide https://docs.oracle.com/cd/F33532_01/English/admin/cic_advisor_admin/index.htm* to set up to setup and manage CIC for your users.

CIC Application Setup Process

The CIC application setup process illustrates the applications you need to setup to display P6 EPPM projects in CIC.
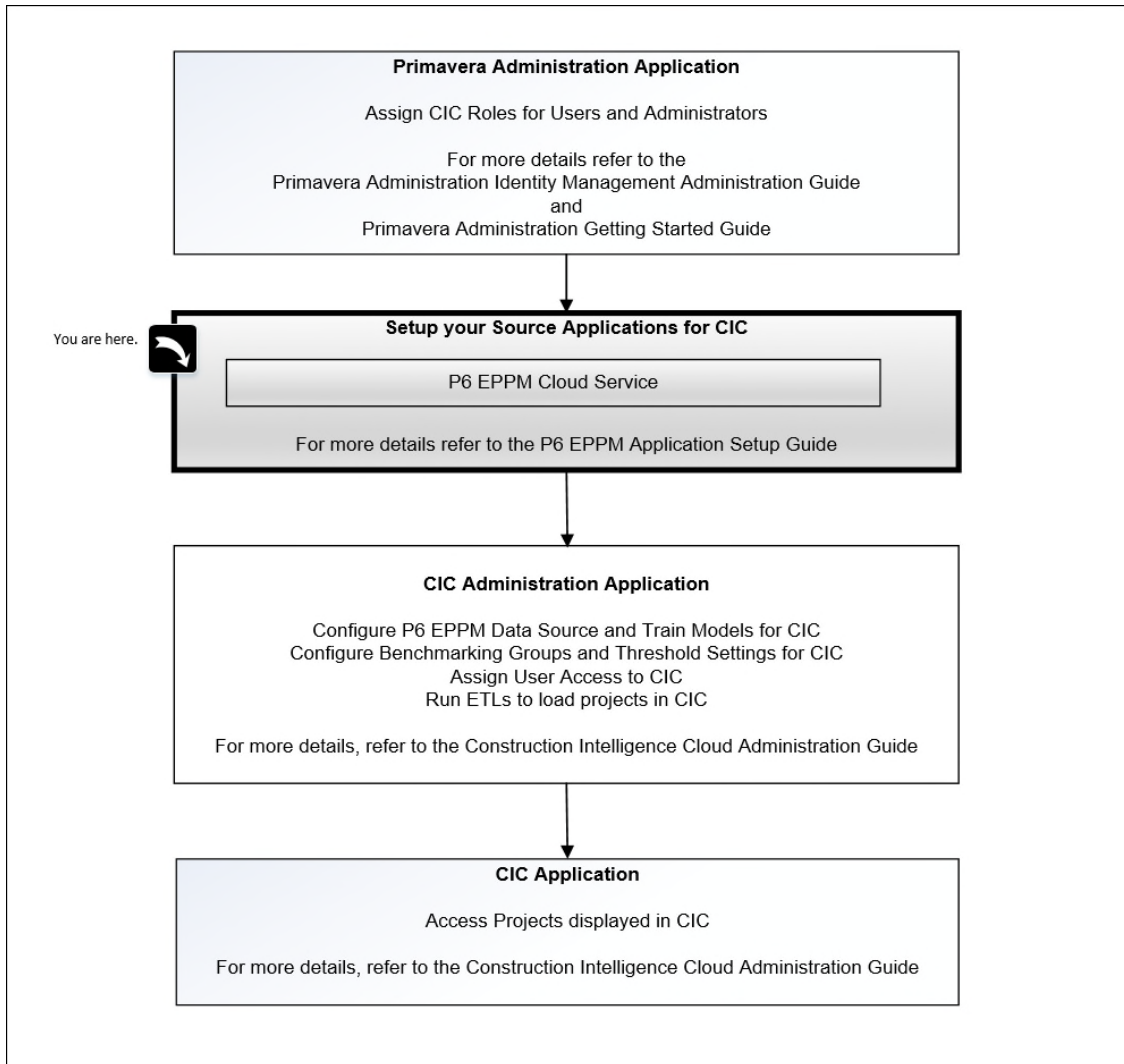
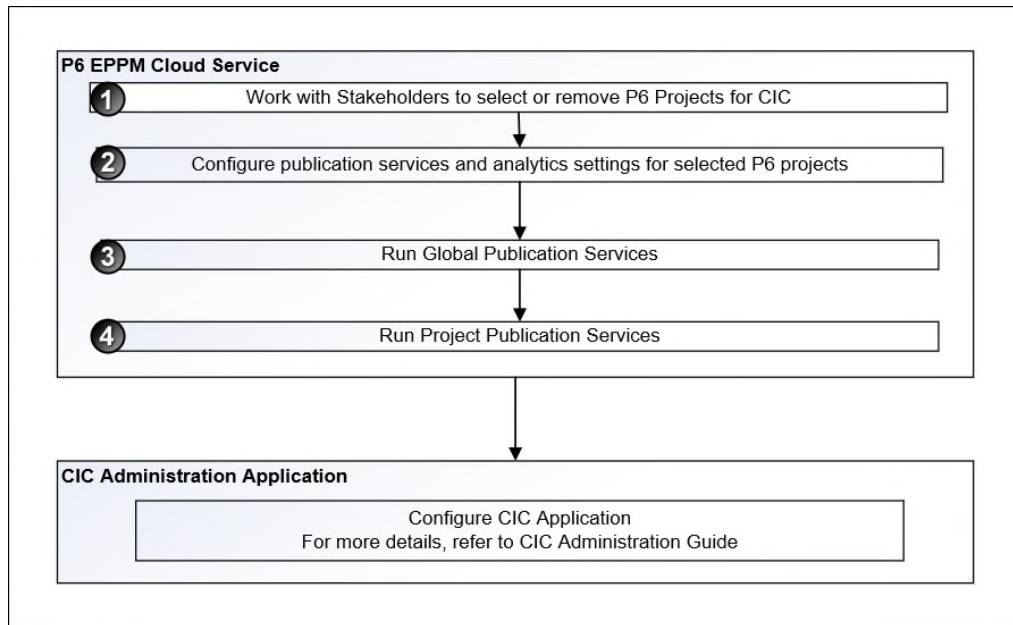## How to Use this Guide

To successfully configure P6 EPPM on-premises for CIC, complete the task sequence outlined in **Configuring P6 EPPM Cloud for CIC** (on page 7).

Configuring P6 EPPM Cloud for CIC

The following schematic illustrates how to setup and configure P6 EPPM cloud for CIC.

To configure P6 EPPM cloud for CIC:

1) Work with key stakeholders in your organization to identify P6 projects to be made available in CIC and ensure users are granted access to the **P6 Analytics** module.

   For more details on how to select specific projects, see *Selecting P6 Projects for CIC for the First Time* (on page 11).

   > **Note**: If you are also licensed for Primavera Analytics, then any projects added or removed in CIC Advisor or CIC Analytics will correspondingly reflect in Primavera Analytics.

2) Ensure P6 users accessing CIC have access to **P6 Analytics** module in P6. Otherwise, although users can sign in to CIC, they cannot view or access projects in CIC. Contact your P6 administrator if necessary.

3) For the identified P6 projects, enable publication and analytics settings in P6.

   For more details, see *Enabling History and Publication Services Settings for P6 Projects* (on page 12).

   For more details on how to grant user access to the P6 analytics module, see *Configuring User Access for P6 Analytics Module* (on page 9).

4) Run global publication services in P6 EPPM to prepare global data for CIC.

For more details, see **_Enabling Automatic Publishing of P6 Global Data_** (on page 15) or **_Manually Publishing P6 Global Data_** (on page 18).

5) Run project publication services in P6 EPPM to prepare project data for CIC.

For more details, see **_Enabling Automatic Publishing of P6 Project Data_** (on page 16) or **_Manually Publishing P6 Project Data_** (on page 19).

6) Proceed to **_Next Step_** (on page 21) of the application setup sequence.

Configuring User Access for P6 Analytics Module

Users who will be given access to view projects in CIC must be given access to the P6 Analytics module in P6 EPPM.

To configure user access to the P6 Analytics module:

1) Sign in to P6 EPPM with administration privileges.
2) Click **Administration**.
3) On the Administration navigation bar, click **User Administration**.
4) On the **User Administration** page, click **Users**.
5) On the **Users** page, select a user.
6) In the **Module Access** detail window, select **P6 Analytics** option to grant access to the selected user.
7) On the **Users** page, click **Save**.

Publishing P6 EPPM Projects

After identifying the projects that are to be displayed in CIC, you will need to run global and project publication services.

To make projects available in CIC, complete the following tasks in P6:

▶ enable P6 projects for running P6 publication services
▶ run P6 publication services to transform data move it to P6 EPPM Extended Schema
▶ run STARETL processes to transfer data from P6 Extended Schema to Primavera Data Warehouse

For more details, see **Configuring P6 EPPM Cloud for CIC** (on page 7) to view the sequence of publication tasks outlined to complete the above tasks.

This chapter provides detailed instructions for completing the above tasks.

In This Section

Selecting P6 Projects for CIC for the First Time

When you receive Oracle's Welcome email for CIC, an initial ETL has already been processed with *all* published P6 projects loaded into CIC. Therefore, work with the key stakeholders in your organization to identify:

▶ projects that need to be removed from CIC
▶ projects that need to be visible in CIC

For example, your organization has 35 ongoing projects. The initial load will include all 35 projects in CIC. However, your organization may want to draw insights for only the top 10 high priority projects. Therefore you will need to remove the remaining projects from being loaded to CIC.

To remove P6 projects from being selected for CIC:

1) Sign into P6 as a user.

   http://<hEnabling History and Publication Services Settings for P6 ProjectsEnabling History and Publication Services Settings for P6 Projectsost>:<port>/p6/action/login

> **Note**: Ensure you have the following security privileges: *Edit Project Details Excepts Costs/Financials* project security privilege, A*dd/Edit/Delete Global Activity and Assignment Layouts, Views and Filters* global security privilege.

2) Click **Projects**.

3) On the **Projects** navigation bar, click **EPS**.

4) On the **EPS** page:

   a. Click the **Views** list and select a view.

   b. In the EPS / Project Grid, deselect the **Enable Publication** option to remove each project from CIC.

   > **Note**: If your organization is a customer of Primavera Analytics also, then any P6 projects deselected for CIC will also not be available for Primavera Analytics.

5) Run publication services in P6 EPPM to publish only the selected projects to P6 Extended Schema for an ETL upload to CIC.

   For more details, see *Enabling Automatic Publishing of P6 Project Data* (on page 16) or *Manually Publishing P6 Project Data* (on page 19).

Enabling History and Publication Services Settings for P6 Projects

View video for configuring P6 for CIC (*https://players.brightcove.net/2985902027001/default_default/index.html?videoId=631201 1691112*)

In P6, you can enable the following settings to determine what type of data is to be captured in CIC:

▶ define history level and interval settings per project to configure the type of data stored in CIC and for a specific time interval

▶ establish the frequency of data being uploaded to the data warehouse

▶ enable publication settings for each project to ensure the data is picked up by P6 EPPM Publication Services

To configure the above settings:

1) Sign in to P6 EPPM.

   > **Note**: A user must have the **Edit Project Details Except Cost/Financials** profile to edit the history settings.

2) Click **Projects**.

3) On the **Projects** navigation bar, click **EPS**.

4) On the **EPS** page:

   a. Select a project.

b. From the **Actions** ▾ menu, select ⬚ **Set Project Preferences**.

5) In the **Project Preferences** pane, click **Analytics & Services**.

a. In the **Publication** section, select the **Enable Publication** option to ensure the project is selected for publication services runs.

> **Tip**: You can also expand an EPS node on the **EPS** page and then select the **Enable Publication** option for multiple projects belonging to the node.

b. In the **Analytics** section:

1. Choose one of the following for **History Level**:
   - **None** (default)
   - **Project**
   - **WBS**
   - **Activity (Daily)**
   - **Activity (Weekly)**
   - **Activity (Monthly)**

1. Choose one of the following for **History Interval - Project or WBS**:
   - **Month** (default)
   - **Week**
   - **Quarter**
   - **Year**
   - **Financial Period**

> **Note**: If you select **Activity (Daily)** or **Activity (Weekly)** or **Activity (Monthly)** as the **History Level**, this will automatically set the **History Interval** for Activity and Resource Assignment history to the corresponding activity time interval. Use caution when selecting which projects you choose to have daily history captured for as this can affect the amount of time and the volume of data processed when running the ETL process. You still need to set the history interval level when selecting Activity level history, which will apply to project and WBS-level history only.

1. Select one of the following values from the **Data Warehouse Update Frequency (ODI Only)** list:
   - *Scheduled*: When the ETL runs and the project data is pulled into analytics
   - *Immediate*: The data is extracted any time a change is identified in the project.

> **Note**: Immediate project updates are focused more on the specific scheduling areas of the project – costs, dates, durations. They are geared towards outages or scenarios where live updates are required for short length projects. Immediate project updates should be used sparingly only for a small select group of projects. Not all projects should be set to *Immediate*, this can have side effects on update frequency and

performance. If a project is completed *Immediate* updates should be turned off.

6) Click **Save** to continue working or click **Save and Close** if you are finished.

7) Publish the changes you made by Configuring and Running <0P_ProdName_P6_Short> Publication Services.

P6 EPPM Publication Services Overview

If you are using P6 EPPM as a data source, Primavera Data Warehouse relies on data from the P6 EPPM Extended Schema and related publication services. Configure the P6 EPPM publication services and run them successfully prior to running a STARETL process. The publication services are responsible for moving and transforming P6 EPPM data into the P6 EPPM Extended Schema.

There are two types of publication services within P6 EPPM that need to be run in order to ensure that the data in the P6 EPPM Extended Schema is up-to-date prior to running the STARETL process.

▶ **Global Scheduled Services**: Global services are responsible for moving global/enterprise level data (users, security, codes, or hierarchies) from the P6 EPPM base tables into the Extended Schema.

Global scheduled services include the following:

  ▶ **Publish Enterprise Data Service** calculates and publishes enterprise-level business objects containing calculated and denormalized fields, including cost accounts, currencies, calendars, codes, funding sources, resource teams, role teams, timesheet dates, UDFs and more. Enterprise data does not usually change frequently, so consider scheduling this service to run less frequently.

  ▶ **Publish Enterprise Summaries Service** calculates and publishes EPS-level spread data for currently published projects in a given EPS. Depending on the spread interval you intend to use, EPS-level spread data can change frequently, so it might be appropriate to consider scheduling this service to run more frequently.

  ▶ **Publish Resource Management Service** calculates and publishes the resource hierarchy, resources, resource rates, resource limits, role rates, resource role assignments, and resource security. Resource management data does not usually change frequently, so consider scheduling this service to run less frequently.

  ▶ **Publish Security Service** publishes users, the OBS, and security profiles and calculates security for the P6 Extended Schema. Security data does not usually change frequently, so consider scheduling this service to run less frequently.

▶ **Project Level Service**: This service updates data in the P6 EPPM Extended Schema for each project. This service can be configured to run at specific time intervals or based on a number of changes interval. This service processes projects sequentially depending on the **Publication Priority** assigned to each project. Projects with a lower value for **Publication Priority** are published before those with a higher value for **Publication Priority**.

Complete the following steps to load P6 EPPM projects to P6 Extended Schema before running the ETL process for CIC:

Configuring and Running P6 EPPM Publication Services

To configure and run publication services in P6 EPPM:

1) Sign in to P6 EPPM as a user.

   http://<host>:<port>/p6/action/login

   > **Note**: Ensure you have the following security privileges: *Edit Application Settings*, *Administer Global Scheduled Services*, and *Administer Project Scheduled Services* global security privileges.

2) Click **Administration**.
3) On the **Administration** navigation bar, click **Application Settings**.
4) In the **Application Settings** page, select **Services** in the sidebar.
5) In the **Publication** area, use the following fields to set the amount and frequency of data updates in the P6 EPPM Extended Schema. For Primavera Data Warehouse, set the following:
   ‣ **Start Date**: Enter the start date for all time-distributed data published.
   ‣ **Finish date is current date plus**: Enter the rolling end date for all time-distributed data published.
   ‣ **Time distributed interval**: Enter the spread data bucket types (day or week).
6) In the **Project Publication** section, select the **Enable Publish Projects** option and configure the remaining options in this section as needed for your data. For more details on configuring these options, see *P6 Help*.

   The projects that qualify for publication publish to P6 EPPM Extended Schema.

   > **Note**: To verify the status of each project publication job in P6, click the **User** menu and select **View Service Status**.

Enabling Automatic Publishing of P6 Global Data

Perform the steps below to configure P6 to automatically publish any of the following types of global data to reporting tables.

‣ Enterprise Data
   ‣ Project Data
   ‣ Activity Data

- ▸ Resource Data
- ▸ Calendar Data
- ▸ Enterprise Data dictionary definitions
- ▸ Enterprise Summary Data including portfolio data
- ▸ Resource Management Data
- ▸ Security Data
- ▸ Audit Data

To automatically publish P6 global data:

1) Sign into P6 EPPM.

   http://<host>:<port>/p6/action/login

   > **Note**: Ensure you have the following security privileges: *Administer Global Scheduled Services* and *Administer Project Scheduled Services* global security privileges.

2) Click **Administration**.
3) On the **Administration** navigation bar, click **Scheduled Services**.
4) On the **Scheduled Services** page, select **Global**.
5) On the **Global** page:

   a. Select a service, then configure its settings in the **Service Settings** detail window to set how often and when the services should run. For example, you might specify that the service runs daily on Wednesdays with a start time of 10:15 PM.

      > **Note**: Oracle recommends running the Publish Security service first if the Run After Previous option is selected in the Run Service list for other publication services. Running the Publish Security service first will ensure that security data updates in the extended schema as soon as possible and ensures that the security restrictions are in place before you run the report.

   b. Select the **Enabled** option for any of the global services listed.
   c. If you choose to run one or more services with the relative frequency value of **After previous service**, click **Move Up** or **Move Down** to arrange the services in your preferred sequence.
   d. Click **Save**.

Enabling Automatic Publishing of P6 Project Data

Perform the following procedure to enable projects for publication, and to set options to schedule project publication. Then, as you work, P6 automatically detects the changes to your projects that trigger the publication of their data.

To enable P6 publication services for project data:

1) Sign into P6 EPPM as a user.

   http://<host>:<port>/p6/action/login

   > **Note**: Ensure you have the following security privileges: *Administer Global Scheduled Services* and *Administer Project Scheduled Services* global security privileges, and *Edit Application Settings* security privilege.

2) Click **Administration**.
3) On the Administration navigation bar, click **Application Settings**.
4) On the **Application Settings** page, select **Services**.
5) On the **Services** page, in the **Project Publication** section:
   a. Select **Enable Publish Projects** to manually publish projects and run the **Check Overallocation** service. You should not enable publish projects until all projects are ready for publication.
   b. In the **Publish projects every** field, select an interval by which projects are polled to be published. The interval should be set to a low number (less than 5 minutes) to ensure that ASAP Publish Project and Check Overallocation services are processed in a timely fashion. However, if your users will not be using these ASAP services, you can set this value higher.
   c. In the **Start Time** field, enter the start time for scheduled jobs when the Publish projects every field contains a value less than 1 day.
   d. In the **Publish a changed project when the...** section:
      1. Enter a number in the **Number of changes exceeds** field. This threshold setting determines the number of edits users can make to the project data before P6 publishes its data. Assuming a constant rate of change among projects, a lower value will result in more frequent publication of project data. If you enter a value of 0, projects with tracked changes will be automatically published.
      2. Enter a time period for the **Time since last publication exceeds** field. This threshold setting determines how often the publication of project data should occur. For example, if you enter 12 hours, the project data will be published every 12 hours unless the threshold for the number of changes has already been reached.
   e. Select **Publish idle projects** to add projects to the service queue that are enabled for publication but have not been changed during the time threshold. This setting is only valid for the initial run of the service.
   f. In the **Maximum number to publish** field, enter the maximum number of pending idle Publish Project services that can be present at once in the service queue. This prevents performance problems during peak demand when enabling the publication of a large number of projects. For example, if the service runs and queues 40 projects that have exceeded specified thresholds and must be published, or that have been manually published, and you have set the maximum to 100, P6 will schedule up to 60 idle projects for publication.
   g. Select **Publish resource and role data** if you want to be able to publish resource and role data in the Team Usage view.
   h. Select **Enable Baseline Publication** if you want to be able to publish baseline data.

i. Select **Enable Notification Email** and type an email address in the **Notification Email address** field if you want to receive an email if publication services fail.

j. Click **Save**. .

Manually Publishing P6 Global Data

Under special circumstances, if you want to manually publish any of the following types of global data to the reporting tables t, perform the steps below.

▶ Enterprise Data
  ▶ Project Data
  ▶ Activity Data
  ▶ Resource Data
  ▶ Calendar Data
  ▶ Enterprise Data dictionary definitions
▶ Enterprise Summary Data including portfolio data
▶ Resource Management Data
▶ Security Data
▶ Audit Data

P6 will automatically publish global data; however, you may want to publish the data manually in special cases such as when generating an important report at a specific time.

To manually publish P6 global data:

1) Sign in to P6 as a user.

   http://<host>:<port>/p6/action/login

   > **Note**: Ensure you have been assigned the following security privileges: *Administer Global Scheduled Services* global security privilege to run a global scheduled service.

2) Click **Administration**.
3) On the **Administration** navigation bar, click **Scheduled Services**.
4) On the **Scheduled Services** page, select **Global**.
5) On the **Global** page:
   a. Select any of the global services listed.
   b. Click **Run Service**.
   c. In the resulting message box, click **OK**.

Tip

▶ If the service listed under the manually selected service is configured to run *After previous* service, it will run automatically when the selected service finishes.

Manually Publishing P6 Project Data

If you may want to publish the data manually in special cases such asto include a project in CIC within a specific timeframe, complete the following procedure.

To manually publish P6 project data:

1) Sign into P6 EPPM as a user.

   http://<host>:<port>/p6/action/login

   > **Note**: Ensure you have been assigned the following security privileges: *Administer Global Scheduled Services, Administer Project Scheduled Services* global security privileges, and *Edit Application Settings* security privilege.

2) Click **Projects**.
3) On the **Projects** navigation bar, click **EPS**.
4) On the **Actions** menu of the **EPS** page, click **Publish Projects**.

Next Step

Congratulations on completing the setup in P6 EPPM!

Proceed to use the **CIC Advisor Administration Guide
https://docs.oracle.com/cd/F33532_01/English/admin/cic_advisor_admin/index.htm** to set up the *CIC Advisor* Administration application.