

Oracle
Primavera Administration
Getting Started Guide

Version 24
August 2025

Oracle Primavera Administration Getting Started Guide

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About This Guide

Scope

This guide contains general information about how to access and administer P6 EPPM, Primavera Unifier, Primavera Gateway, Construction Intelligence Cloud Advisor, Construction Intelligence Cloud Analytics, and Primavera Analytics on the cloud. It describes:

- ▶ The role of the cloud administrator.
- ▶ Information about the Primavera Portal.
- ▶ A general step-by-step overview on how to start administering your applications.

Audience

This guide should be used by cloud administrators who have access to Primavera Administration.

About Consent Notices

Consent notices alert you to the need to protect personal information (PI). You and your organization might be collecting, processing, storing, and transmitting PI while using Primavera Administration. When you accept a consent notice, your consent covers the collection, processing, storing, and transmission of PI data in all areas of Primavera Administration and means of retrieving data from Primavera Administration including but not limited to adding users, importing users, editing user details, reporting, and using the API and DACS. If you refuse consent you will not be able to access the User Administration tab.

You may be asked to provide consent to show that you understand the need to treat PI as secure data. You may also be asked to provide consent for your organization to collect, process, store and transmit your PI. If you refuse consent you will not be able to log into Primavera Administration.

Cookies Usage in Primavera Administration

Cookies are small text files that are placed on your computer, smartphone or other device when you access the internet.

When you use Primavera Administration, the server may generate cookies and send them to the user's browser. The user's machine stores the cookies, either temporarily by the browser, or permanently until they expire or are removed manually.

Oracle might use cookies for authentication, session management, remembering application behavior preferences and performance characteristics, and to provide documentation support.

Also, Oracle might use cookies to remember your log-in details, collect statistics to optimize site functionality, and deliver marketing based on your interests.

About the Cloud Administrator Role

The cloud administrator manages employee identity information and access to applications by:

- ▶ Working with senior management and application administrators to determine which employees require access to applications.
- ▶ Working with application administrators to determine user, application access, and company assignments.
- ▶ Managing user accounts, companies, and the password policy.
- ▶ Ensuring that users complete the prerequisites to access P6 Professional.

When your cloud environment is available, you will receive a Welcome Email, which contains cloud administrator login details.

Service Administrator Action List

Overview

This action list is intended for the Service Administrator at your company.

- ▶ The Service Administrator is the person who has the primary responsibility for a successful implementation and ongoing use of your Cloud Service.
- ▶ Oracle will target important communications to the Service Administrator, who is the key person in your business that manages your Cloud Services.
- ▶ The Service Administrator communicates the status of the implementation and ongoing use of your Cloud Service to stakeholders within your business.

Perform these critical tasks as soon as possible after receiving your environment access email. Your temporary password to log in to your environment expires in 60 calendar days.

Follow all Instructions in Your Introductory Email

This environment access email contains critical details required for you to access and administer your Cloud Service. You will receive an email for each provisioned environment. Save these emails.

Log in to your Cloud Service. Use the Identity Management URL, username and temporary password provided in the environment access email to verify access to your service. At your first login attempt, create a new password and make note of it because at this point you are the only person with access.

You will receive a separate e-mail for each provisioned environment, and the password for each environment is maintained separately. You will not be able to access the Primavera applications until you grant the appropriate application roles to your user.

Log in using a supported browser. To see a list of supported browsers, view the Client System Requirements document for either P6 EPPM or Primavera Unifier

Register your New Customer Support Identifier in My Oracle Support

You will receive a separate email instructing you to register your new Customer Support Identifier (CSI) number with My Oracle Support (MOS). Follow the steps in the email or on the sign-in page (support.oracle.com) to create a new account. If you already have a MOS account, remember to add your new CSI to your existing MOS account. The first person to request access to a CSI must be checked by Oracle to ensure the domain of their email address matches the domain associated with the CSI. Once approved, they will be made the administrator of that CSI, and can approve others to user it. If someone else has already been made the administrator of that CSI, then the request will be emailed to them for approval.

Further information is available on the Support page of this library.

Select Backup Service Administrators

Until you add backup administrators, you are the sole Service Administrator and the only person able to add accounts, grant roles, and reset passwords. You will also be the only person receiving Oracle notifications about upgrades, monthly updates, planned downtime, and maintenance periods.

Follow these steps:

- 1) Identify at least one other person in your organization who should have access to administrate accounts for your Cloud Service.
- 2) Create a new account for each person you have identified as backup administrators in Primavera Administration.

To find out how to create user accounts, see the *Primavera Administration Identity Management Administration Guide*.

- 3) Submit a service request to Oracle Support requesting the newly created users be made Service Administrators.

Identify Key Contacts for Notifications

Verify that the key personnel in your organization who should receive critical notifications about your Cloud Service have been added as users. This could include backup administrators, project managers, implementation partners and other project team members. Once the users have been created, notify your Customer Success Manager with the list of users who should receive notifications about the Cloud Service.

Get Connected

Register for the Construction and Engineering community. You can use My Oracle Support Community to post technical questions and get resolution on technical issues.

Further information is available on the *Support* page of this library.

Create End User Accounts

Before end users can access the Cloud Service application it is necessary to provision each user access to the system, and assign roles to each user to control the functionality that will be available to them.

To find out how to create user accounts, see the *Primavera Administration Identity Management Administration Guide*.

Get Started with your Implementation

Review additional product-specific tools and resources that help you and your implementation team by referencing the Documentation libraries at this location:

- ▶ Primavera Administration:
<https://docs.oracle.com/en/industries/construction-engineering/primavera-administration/index.html>
- ▶ Primavera Analytics:
<https://docs.oracle.com/en/industries/construction-engineering/primavera-analytics/index.html>
- ▶ Construction Intelligence Cloud Advisor: https://docs.oracle.com/cd/F33532_01/index.htm
- ▶ Primavera Gateway:
<https://docs.oracle.com/en/industries/construction-engineering/primavera-gateway/index.html>
- ▶ P6 EPPM:
<https://docs.oracle.com/en/industries/construction-engineering/primavera-p6-project/index.html>
- ▶ Primavera Unifier:
<https://docs.oracle.com/en/industries/construction-engineering/primavera-unifier/index.html>

Preparing to Administer Your Applications

When you first gain access to your cloud deployment, consider the following workflow that can help you quickly create users and assign access to applications:

- 1) Learn about the Primavera Portal. The Primavera Portal is the landing page to your applications. Both users and administrators will use this page. For more information about the Cloud Portal, refer to **About the Primavera Portal** (on page 9).
- 2) Review the *Identity Management Administration Guide* to learn how to manage user identity and access, including the following:
 - ▶ Managing user accounts
 - ▶ Managing companies
 - ▶ Managing the password policy
- 3) Depending on the applications that you are using, review the product-specific documentation to learn about the following:
 - ▶ Using the application.
 - ▶ Assigning application-specific privileges or permissions for function or application access.
 - ▶ Understanding the parts of your application that may differ from a typical, on-premises deployment of the same application.

For details on the relevant documents for each product, see **Where to Go From Here** (on page 15).
- 4) Coordinate with the administrators for your application to determine the users that require access to it and the access type they require.

- 5) Determine your password policy.
- 6) Create user accounts in Primavera Administration. You can add users one at a time or import users in bulk. For details, see the *Identity Management Administration Guide*.
- 7) If you haven't already done so, assign application access to each user. For details, see the *Identity Management Administration Guide*.
- 8) Reset each user's password in Primavera Administration. For details, see the *Identity Management Administration Guide*.

Note: For details on enabling identity federation with your application, see *Enabling Federated Identity Single Sign-On (SSO) Through SAML 2.0 For Primavera Products Hosted In Oracle Cloud (Doc ID 2087067.1)* on My Oracle Support at <http://support.oracle.com>.

Tips

- ▶ Some corporate network firewalls may block P6 features if the firewall has strict security or filter configurations in place. This may cause various intermittent error messages to be displayed in the browser or in P6 Professional. If these errors occur when running on a corporate network but do not occur when running from a public or home internet provider, the culprit is most likely to be the corporate firewall rules.

Oracle recommends that you test while P6 URLs are fully allow-listed in the firewall to confirm that the firewall is the cause of the issue. You can then re-enable the original rules, reproduce the error, and check the firewall log files to determine the cause of the issue. Next disable one firewall check at a time for the P6 URLs and test again. When you can no longer reproduce the errors, you will know which firewall check or checks need to be relaxed for the P6 URLs.

If you are unable to determine specific firewall checks which are causing the errors, allow-list the P6 URLs.

- ▶ If you are also a licensed user of Primavera Analytics on-premises or Primavera Data Warehouse on-premises, use the Primavera Analytics Cloud Sync Utility to populate your on-premises Primavera Data Warehouse with data from your P6 EPPM cloud instance. For more details, see the *Primavera Analytics Cloud Service Administration Guide*.

About the Primavera Portal

The Primavera Portal is the access point for your applications.

Each application that a user can access appears as a "tile" in the Primavera Portal. Click a tile or one of the links to launch an application.

Depending on the assigned application access and your specific type of cloud deployments, the following tiles can appear on the Primavera Portal:

Environment: Enables you to switch between your cloud environments.

Primavera Analytics

Analytics: Launches Primavera Analytics.

Analytics Documentation: Opens Primavera Analytics documentation.

Construction Intelligence Cloud Advisor

Construction Intelligence Cloud Advisor (CIC Advisor): Launches Construction Intelligence Cloud Advisor.

Construction Intelligence Cloud Advisor (CIC Advisor) Documentation: Opens Construction Intelligence Cloud Advisor documentation.

Construction Intelligence Cloud Analytics

Construction Intelligence Cloud Analytics (CIC Analytics): Launches Construction Intelligence Cloud Analytics.

Construction Intelligence Cloud Analytics (CIC Analytics) Documentation: Opens Construction Intelligence Cloud Analytics documentation.

Primavera P6

P6 EPPM: Launches P6 EPPM.

P6 Team Member: Launches P6 Team Member Web.

Install P6 Professional: Opens the **Installing P6 Professional With ClickOnce** page, from which you can download the 32-bit or 64-bit version of P6 Professional.

Primavera Virtual Desktop: Launches Primavera Virtual Desktop.

Web Services Instructions: Opens the **Web Services Instructions** page, which provides information about using P6 EPPM Web Services.

P6 Documentation: Opens P6 EPPM documentation.

Primavera Unifier

Unifier: Launches Primavera Unifier.

Web Services Instructions: Opens the **Web Services Instructions** page, which provides information about using Primavera Unifier Web Services.

Unifier Documentation: Opens Primavera Unifier documentation.

Cloud Support Applications

Primavera Gateway: Launches Primavera Gateway.

Primavera Analytics Administration: Launches Oracle Business Intelligence Enterprise Edition (OBIEE).

Primavera Administration: Launches Primavera Administration.

Cloud Services Documentation: Opens the Cloud Services documentation library.

Download Cloud Sync Client: Launches the download of Cloud Sync client installation files and documentation.

Supporting Applications

Identity Cloud Service (IDCS): Launches the identity domain, which enables users to reset their own password. Note that Oracle Customer Support will not be able to provide support to users that use the identity domain for any other task.

Identity and Access Management (IAM): Launches the identity domain, which enables users to reset their own password. Note that Oracle Customer Support will not be able to provide support to users that use the identity domain for any other task.

Oracle BIP: Launches Oracle Business Intelligence (BI) Publisher.

Navigating Using a Keyboard

You can use the keyboard to navigate throughout the application. Use the tab key to cycle through elements within the application, and press Enter to access them. Use application keyboard shortcuts to access frequently used or important functionality. Keyboard shortcuts may change depending on the browser you use.

Main Content Area

- ▶ Use **Ctrl + +** or **-** to zoom in and zoom out anywhere in the application.

Skip to Main Content

- ▶ When you open a new page, press **Tab + Enter** to skip to the main content of the page.

Table

- ▶ Any table has a similar method of interaction.
- ▶ Only the rows that are visible are rendered. As you navigate up and down the table more items will be visible.
- ▶ To enter the table, tab to it. Tabbing to the table will cause an overlay to be displayed with the message **Press tab to skip over this widget. Press Enter, Esc or click to enter the grid.**
- ▶ Use **Arrows** or **Tab** and **Shift + Tab** to navigate through the table. To move focus to another cell when you reach the end of the row, use the **Arrows** or **Shift + Tab**.
- ▶ Press **F2** or **Enter** to put the cell in edit mode.
- ▶ Press **Spacebar** to activate cells with special actions such as links or buttons.
- ▶ To use the context menu, navigate to the first cell of a row and press **Shift + Tab**, then press **Spacebar** to display the drop down. Use **Up** and **Down Arrows** to highlight an option. Press **Enter** to select the option.
- ▶ If the table is a hierarchical table, view and hide children by navigating to the first cell of a row and pressing **Ctrl + Right Arrow** or **Ctrl + Left Arrow**.

Detail Panels

- ▶ Detail panels show more details about a row that is selected. The row navigated to is the one selected. To see more details of that row item, press **Esc** to leave the table and tab to the detail panel. Often, there is more than one tab in the detail panel. Each tab has its own set of information.
- ▶ Use the **Right** and **Left Arrows** to navigate from one tab to another.

- ▶ When on a tab, navigate through the fields of that tab by pressing **Tab**.

Individual Web Elements

Picker

- ▶ Press **F2** to activate edit mode.
- ▶ Press **F2** to display the picker.
- ▶ Tab to the search field and enter your choice.
- ▶ Tab to the selected list.
- ▶ Press **Up** and **Down Arrows** to highlight choice.
- ▶ Press **Enter** to select choice and close picker.

Detail Popover

- 1) Tab to the context bar.
- 2) Tab to a workspace, project, portfolio, or project collection.
- 3) Press **Alt** and **M** to access the detail popover for an object or user.

Spinner

- ▶ Tab to the spinner.
- ▶ Use **Up** and **Down Arrows** to select your choice.
- ▶ Press **Tab** to leave the spinner.

Combo Box

- ▶ Option 1:
 1. Tab to the combo box.
 2. Enter your choice.
 3. Press **Enter** to select.
- ▶ Option 2:
 1. Tab to the combo box.
 2. Press **Up** and **Down Arrows** to highlight choice.
 3. Press **Enter** to select.

Double Column Select Dialog Box

- ▶ To select a column, tab to Available Columns.
 - ▶ Use **Up** and **Down Arrows** to highlight column. If needed, use **Right** and **Left Arrows** to expand and collapse child columns.
 - ▶ Press **Spacebar** to select column.
 - ▶ Tab to right arrow button.
 - ▶ Press **Spacebar** to move column to Selected Columns.
 - ▶ Tab to Apply button.
 - ▶ Press **Spacebar** to activate and close dialog.
- ▶ To remove a column, tab to Selected Columns.
 - ▶ Use **Up** and **Down Arrows** to highlight column. If needed, use **Right** and **Left Arrows** to expand and collapse child columns.

- ▶ Press **Spacebar** to select column.
- ▶ **Shift + Tab** to right arrow button.
- ▶ Press **Spacebar** to move column to Available Columns.
- ▶ Tab to Apply button.
- ▶ Press **Spacebar** to activate and close dialog.

Number Fields

- ▶ **Up Arrow:** Increments the number field by step.
- ▶ **Down Arrow:** Decrements the number field by step.
- ▶ **Home:** Increments the number field to the maximum if provided.
- ▶ **End:** Decrements the number field to the minimum if provided.

Multiselect Cells

- ▶ **Up Arrow:** Changes the focus to the node above.
- ▶ **Down Arrow:** Changes the focus to the node below.
- ▶ **Left Arrow:** Changes the focus to the cell or field to the left.
- ▶ **Ctrl + Shift + Left Arrow:** Collapses the node.
- ▶ **Right Arrow:** Changes the focus to the cell or field to the right.
- ▶ **Ctrl + Shift + Right Arrow:** Expands the node.
- ▶ **Home:** Mark first cell in the highlighted node as focused.
- ▶ **End:** Mark last cell in the highlighted node as focused.
- ▶ **Spacebar:** Selects the currently focused node.
- ▶ **Shift + Up Arrow:** Extends the selection up by 1.
- ▶ **Shift + Down Arrow:** Extends the selection down by 1.
- ▶ **Ctrl + Shift + Up Arrow:** Move the currently selected nodes (or focused node if there are no selected nodes) up by 1.
- ▶ **Ctrl + Shift + Down Arrow:** Move the currently selected nodes (or focused node if there are no selected nodes) down by 1.
- ▶ **Ctrl + Spacebar:** Toggle selection of currently focused node.

Apple Safari Keyboard Shortcuts

You can access Primavera Administration functions in Apple Safari using the following keyboard shortcuts.

Action	Shortcut
Access the Home page	Alt + Ctrl + H
Access the Help menu	Alt + Ctrl + P
Cancel	Alt + Ctrl + R
Save	Alt + Ctrl + S

Selects the Errors button when it appears on the screen. If there is no Errors button, it may open the browser Edit menu.	Alt + Ctrl + E
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Google Chrome Keyboard Shortcuts

You can access Primavera Administration functions in Google Chrome using the following keyboard shortcuts.

Action	Shortcut
Access the Home page	Alt + H
Access the Help menu	Alt + P
Cancel	Alt + R
Save	Alt + S
Zoom In	Ctrl + +
Zoom Out	Ctrl + -
Selects the Errors button when it appears on the screen. If there is no Errors button, it may open the browser Edit menu.	Alt + Shift + E

Microsoft Edge Keyboard Shortcuts

You can access Primavera Administration functions in Microsoft Edge using the following keyboard shortcuts.

Action	Shortcut
Access the Home page	Alt + H, then Enter
Access the Help menu	Alt + P, then Down Arrow, then Enter
Cancel	Alt + R
Save	Alt + S

Selects the Errors button when it appears on the screen. If there is no Errors button, it may open the browser Edit menu.	Alt + E
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Quarterly and Monthly Maintenance Schedule

Oracle periodically performs changes to cloud hardware infrastructure, operating software, product software, and supporting application software to maintain operational stability, availability, security, performance, and currency of your applications. In order to perform these changes, Oracle reserves specific maintenance periods for changes that may require Cloud Services to be unavailable.

Where to Go From Here

Depending on which applications you are using, a cloud administrator may also need the following guides:

- ▶ *Identity Management Administration Guide*
- ▶ *Primavera Analytics Cloud Service Administration Guide*
- ▶ *Construction Intelligence Cloud Advisor Administration Guide*
- ▶ *Primavera Gateway Administration Guide*
- ▶ *P6 EPPM Application Administration Guide*
- ▶ *Unifier Administration Guide*