



PRIMAVERA

**P6 Reporting Database User's Guide  
Release 3.0**

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# Copyright

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Oracle Primavera P6 Reporting Database User's Guide

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# Preface

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With P6 Reporting Database, you can generate databases that can be used to extract and transform data from the P6 EPPM database. You can use this data to create reports using Oracle Business Intelligence Suite or other third-party reporting tools

The two types of databases are the Operational Data Store (ODS) and the Star Schema Database (Star).

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## Where to Get Documentation

For the most up-to-date versions of all manuals and technical documents related to installing, administering, and using P6 EPPM, go to:

**[http://download.oracle.com/docs/cd/E25030\\_01/index.htm](http://download.oracle.com/docs/cd/E25030_01/index.htm)**

Most documentation assumes a standard setup of the product, with full access rights to all features and functions.

You can also access the versions of the product manuals and technical documents that were available at the time of the release from the P6 EPPM Documentation Center, located in the \Documentation\Documentation\_library\language folder of the P6 EPPM physical media or download.

The following table describes the core documents available for P6 EPPM and lists the recommended readers by role. P6 EPPM roles are described in the *Planning Your P6 EPPM Implementation* guide.

Title	Description
<i>What's New in P6 EPPM</i>	Highlights the new and enhanced features included in this release. You can also use the <i>P6 EPPM Cumulative Feature Overview Tool</i> to identify the features that have been added since a specific release level. All users should read this guide.
<i>Planning Your P6 EPPM Implementation</i>	This book provides information on planning your implementation. It provides an installation process overview, frequently asked questions, client and server requirements, and security information. The P6 EPPM network administrator/database administrator and P6 administrator should read this guide.


Title	Description
<i>P6 EPPM Installation and Configuration Guide</i>	This documentation set explains how to install and configure the P6 EPPM using the P6 EPPM Installation and Configuration wizards. The P6 EPPM network administrator/database administrator and P6 administrator should read this guide.
<i>P6 EPPM Installation and Manual Configuration Guide</i>	This documentation set explains how to install and configure the P6 EPPM using the P6 EPPM Installation wizards, and how to manually configure individual components. The P6 EPPM network administrator/database administrator and P6 administrator should read this guide.
<i>P6 EPPM Post Installation Administrator's Guide</i>	Once you have installed and configured your P6 EPPM applications, this guide will tell you how to get started using them. You will want to complete most of the tasks in this guide before you let your users work with these applications. These tasks include information about configuring your users and security settings and privileges, setting your P6 Administrator application and P6 Progress Reporter Administrator settings, and finalizing your P6 Integration API and P6 EPPM Web Services settings. The P6 EPPM network administrator/database administrator and P6 administrator should read this guide.
<i>Tested Configurations</i>	Lists the configurations that have been tested and verified to work with P6 EPPM. The network administrator/database administrator and P6 EPPM administrator should read this document.
<i>P6 EPPM User's Guide</i>	This guide explains how to plan, set up, and manage projects in a multiuser environment. If you are new to P6 EPPM, start with this guide to learn how to use the software effectively to plan and manage projects. When you need more detail, refer to the P6 Help. The program manager, project manager, resource/cost manager, and team leader should read this guide.
<i>P6 Data Dictionary</i>	This data dictionary defines fields used in P6.
<i>P6 Team Member User's Guide</i>	This guide explains how to status activities using P6 Team Member applications, which are P6 Team Member Web, P6 Team Member for iPhone, and E-mail Statusing Service.
<i>P6 Team Member Web Help</i>	Describes how to use P6 Team Member Web to provide status on activities. Team members should read this Help.
<i>P6 Team Member for iPhone Help</i>	Describes how to use the P6 Team Member for iPhone app to provide status on activities. Team members should read this Help.



Title	Description
<i>P6 Professional for EPPM Help</i>	Explains how to use P6 Professional for EPPM to plan, set up, and manage projects in a multiuser environment. If you are new to P6 Professional, use this Help to learn how to use the software effectively to plan and manage projects. The P6 Professional administrator, program manager, project manager, resource/cost manager, and team leader should read this Help.
<i>P6 Help</i>	Describes how to create, manage, plan, and schedule projects, group projects into portfolios, administer all enterprise data, application settings, user accounts, and security profiles, maintain both the organizational breakdown structure (OBS) and enterprise project structure (EPS), manage resources and roles, track risks, issues, and notebooks, create and reuse templates, evaluate budgets, analyze performance and ROI for project portfolios, participate in workflows and document reviews, approve timesheets, and generate reports. The operations executive, P6 EPPM and P6 administrator, program manager, project manager, resource/cost manager, and team leader should read this Help.
<i>P6 Progress Reporter Administrator Help</i>	Describes how to enter database connection information for the P6 Progress Reporter server and modify P6 Progress Reporter server and application settings. The P6 EPPM network administrator/database administrator should read this Help.
<i>P6 Progress Reporter Help</i>	Describes how to use P6 Progress Reporter to enter and update time spent on assignments. Team members should read this Help.
<i>Primavera Timescaled Logic Diagram Help</i>	Describes how to create, modify, and manage Timescaled Logic Diagrams. Timescaled Logic Diagrams condense the project schedule displayed in the Gantt Chart into a more readable, easier to understand format that provides a snapshot of the entire project plan and the chains of activities that drive the project schedule. The Timescaled Logic Diagram application can be used only with P6 Professional.
<i>P6 EPPM Web Services Programmer's Guide, and P6 EPPM Web Services Reference Manual</i>	The <i>P6 EPPM Web Services Programmer's Guide</i> , available as an HTML help system, describes how to invoke, use, and troubleshoot the available services/operations within supported environments. The <i>P6 EPPM Web Services Reference Manual</i> , also available as an HTML help system, describes all services and operations available in P6 EPPM Web Services in a comprehensive manner.
<i>P3 to P6 EPPM Migration Guide</i>	This guide provides best practices for migrating your P3 data to P6 EPPM, and details how P3 functionality maps to P6 EPPM functionality.

### Distributing Information to the Team

You can copy the online documentation to a network drive for access by project participants. Each team member can then view or print those portions that specifically relate to his or her role in the organization.

Throughout this documentation, the Security Guidance icon  helps you to quickly identify security-related content to consider during the installation and configuration process.

### Where To Get Training

To access comprehensive training for all Primavera products, go to:

**<http://education.oracle.com>**

### Where to Get Support

If you have a question about using Oracle products that you or your network administrator cannot resolve with information in the documentation or help, click **<http://support.oracle.com/>**. This page provides the latest information on contacting Oracle Global Customer Support, knowledge articles, and the support renewals process.

P6 EPPM integrates with different Oracle applications; when you create a Service Request, be sure to open the request with the proper Support team. To ensure you reach the proper Support team, enter the correct product information when you create the Service Request. Each product has its own support line.

- ▶ Use the **Primavera P6 EPPM** support line when you are having installation, configuration, or connection issues related to P6 EPPM.
- ▶ Use one of the following support lines when you are having installation or configuration issues that do not relate to P6 EPPM.
  - ▶ Oracle WebLogic Server
  - ▶ Oracle Server
  - ▶ BI Publisher
  - ▶ BPM
  - ▶ Universal Content Management
  - ▶ Microsoft SharePoint
  - ▶ Oracle Enterprise Content Management
  - ▶ Oracle Access Manager
  - ▶ Oracle AutoVue

### Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit **<http://www.oracle.com/us/support/contact-068555.html>** or visit **<http://www.oracle.com/us/corporate/accessibility/support/index.html>** if you are hearing impaired.

## About this Guide

This guide explains how to use ODS and Star with the P6 EPPM database to extract data for use in creating reports through the Oracle Business Intelligence Suite. This guide:

- ▶ Provides an overview of P6 Reporting Database.
- ▶ Provides information about ODS and Star security
- ▶ Describes using BI Publisher to create reports.



# Before You Begin

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This section provides a general overview of P6 Reporting Database and P6 Analytics.

- ▶ P6 Analytics provides customers with an in-depth and comprehensive method for analyzing and evaluating their project performance, project history, and resource assignments and utilization.
- ▶ P6 Reporting Database works with the P6 EPPM database to provide a robust and powerful reporting solution.

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### About P6 Reporting Database

P6 Reporting Database works with the P6 EPPM database to provide a robust and powerful reporting solution. With P6 Reporting Database, you can create day-to-day operational reports based on all aspects of your P6 EPPM data, through use of the P6 EPPM Extended Schema and the Star Schema (Star).

### About the P6 EPPM Extended Schema

The P6 EPPM Extended Schema, and related Publication Services, provide near real-time reporting. They enable users to exercise more control over what data is calculated and stored, and the frequency at which this is done.

The ODS and Star databases are populated directly from new logical views that are part of the P6 EPPM Extended Schema. The P6 EPPM Extended Views allow P6 Reporting Database users to access BI Publisher reports directly from the P6 EPPM database.

For a more detailed overview of the P6 EPPM Extended Schema, see the P6 EPPM documentation.

### About the STARETL Process

The STARETL process provides data movement between the P6 EPPM extended schema and STAR schema.

Use one of the following to run the STARETL process:

- ▶ staretl.bat (in a Microsoft Windows environment)
- ▶ staretl.sh (in a unix or Linux based environment)

This can be run manually, or scheduled to run as you require. See "About Scheduling" in the *P6 Reporting Database Installation and Configuration Guide* for more information about scheduling the processes to run.

### About the ODSETL Process

The ODSETL processes provides data movement between the P6 EPPM extended database and the ODS database. The process can be scheduled to run at regular intervals, using operating system-specific scheduling tools, to ensure up-to-date data freshness.

Use one of the following to run the ODSETL process:

- ▶ odsetl.bat (in a Microsoft Windows environment)
- ▶ odsetl.sh (in a unix or Linux based environment)

This can be run manually, or scheduled to run as you require. See "About Scheduling" in the *P6 Reporting Database Installation and Configuration Guide* for more information about scheduling the processes to run.

### About Security in P6 Reporting Database

This section provides an overview of security in P6 Reporting Database.

#### About ODS Security

The ODS security model emulates the P6 EPPM security model. The Resource and Project Access control policies are maintained in ODS. See "ODS Security Configuration" in the *P6 Reporting Database Installation and Configuration Guide* for more information.

#### About Star Security

The Star maintains security similar to P6 EPPM. The security being maintained consists of Project/Cost security, Resource security, and OBS security. See "Star Security Configuration" in the *P6 Reporting Database Installation and Configuration Guide* for more information.

### About Scheduling

Decide when and how often to update the databases from the P6 EPPM extended schema. The database will undergo a full refresh when it is updated, but the historical trend data from previous periods will not refresh.

The process for updating the ODS and Star databases can be launched in the following ways:

- ▶ Manually when required.
- ▶ Scheduled to occur one time in the future.
- ▶ Scheduled to recur during regular intervals.

The files that launch the database refresh process are:

- ▶ odsetl.bat and staretl.bat on a Windows platform.

- ▶ odsetl.sh and staretl.sh on a non-Windows platform. For information on supported non-Windows platforms, see the *Tested Configurations* document.

They reside in the following folders of your P6 Reporting Database installation folder:


- ▶ <installation folder>\ods
- ▶ <installation folder>\star

To ensure that your P6 Reporting Database system has the latest data from the P6 EPPM extended schema, it is recommended that you run the data refresh process daily during non-peak hours.

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**Note:** Allow sufficient time to complete the scheduled run of the database refresh process; this applies to multiple data source environments as well. Do not overlap the ETL processes; run only one ETL process at a time. Overlapping can cause unexpected results. This includes multiple data source environments. Only one ETL process should run at a time, regardless of the data source.

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Any mechanism can be used to either launch, or schedule the launch, of the odsetl.bat (or odsetl.sh on a non-Windows system) and staretl.bat (or staretl.sh on a non-Windows system) files. The Windows AT command, Task Scheduler, or Unix CRON are all viable options.  The user who initiates the database refresh process needs read/write access to the P6 Reporting Database installation folder.





# Operational Data Store (ODS)

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This section provides an overview of the ODS and the data that it contains.

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### Fields in the ODS

The Operational Data Store (ODS) portion of the P6 Reporting Database is a relational database that contains the following information from the P6 EPPM database:

- ▶ Physical fields
- ▶ Calculated fields
- ▶ De-normalized fields (including Hierarchies, Calendars, and Spreads). There is no dependency on running the P6 EPPM summarizer in order to be able to produce reports on summary data.

### Physical Fields from the P6 EPPM Database

The ODS is a point in time capture of data derived from the P6 EPPM extended schema views. Refer to the OdsFieldMapTable.html file, located in the physical media or download location, for detailed information relating to the fields in the ODS.

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**Note:** For diagrams of the ODS schema, see the ODS\_SCHEMA.zip file included in the documentation folder of the Media pack. You need to use Oracle SQL Developer Data Modeler software in order to open this file. For information about downloading this software, see the following web site:

**<http://www.oracle.com/technetwork/developer-tools/datamodeler/overview/index.html>**

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### De-Normalized Fields from P6 EPPM

By de-normalizing the fields from P6 EPPM, the ODS database is particularly conducive to generating reports, as extensive joins will not be necessary. The following types of fields are de-normalized in the ODS:

- ▶ Name fields
- ▶ Hierarchies
- ▶ Calendars
- ▶ Spreads

Refer to the OdsFieldMapTable.html file located in the physical media or download location for detailed information relating to the fields in the ODS.

## Hierarchies

There are several hierarchy tables in ODS. The purpose of these hierarchy tables is to facilitate many types of roll-up queries. Instead of writing complex recursive or "tree-walking" SQL, users can take advantage of the extra rows and columns in these hierarchy tables to write much simpler queries. The ODS contains the following hierarchy Tables:

- ▶ CostAccountHierarchy
- ▶ EPSHierarchy
- ▶ ProjectCodeHierarchy
- ▶ ActivityCodeHierarchy
- ▶ ResourceCodeHierarchy
- ▶ ResourceHierarchy
- ▶ WBSHierarchy

For each hierarchy table, there is a row for every parent-descendant relationship.

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**Note:** This is more extensive than merely a row for every parent-child relationship. There is also a reflexive row for each object (where the object is both parent and child).

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Each hierarchy table contains a set of columns for the parent object, and a set of columns for the child object. In addition, there are several metadata columns that contain the number of levels from the top for the parent and child, and whether the child has children.

## ODS Calendar Table

The **Calendar** table in the ODS represents days for which work occurs. There are three types of calendars:

- ▶ Global
- ▶ Resource
- ▶ Project

For each calendar defined in the P6 EPPM Database, the ODS Calendar table will contain a set of rows representing each distinct day within the Full Calendar Date Range (as defined in the ODS configuration screen). Each row contains the calendar **name** it represents, the calendar **type**, the actual **date** of the day it represents, and a bitmap of work hours.

ODS Field Name	Data Type	Example Value	Description
ObjectId	integer	566	The unique ID generated by the system.
IsDefault	string	N	The flag that identifies the default global calendar (applies to global calendars only). 'Y' or 'N'
Name	string	Crew4	The name of the calendar.

ODS Field Name	Data Type	Example Value	Description
ProjectObjectld	integer	275	The unique ID of the associated project.
BaseCalendarObjectld	integer	633	The unique ID of the global calendar to which this calendar is linked. Any changes to the global calendar are automatically propagated to this calendar.
lastchangedate	date	7/6/07 16:46	The date that the calendar was last edited
Type	string	Resource	The calendar type - either Global, Resource, or Project. Global calendars can be assigned to projects and resources. Resource calendars can be assigned only to resources. Project calendars are specific to projects.
daydate	date	9/20/07 0:00	The actual day that the calendar row represents
WeekdayNumber	integer	5	integer day of week (1-7), Sunday=1 if Sunday is selected as the first day of the week in the Admin Preferences of the P6 EPPM module.
WorkDayFlag	string	Y	Y' or 'N', indicates if this day has work time.
TotalWorkHours	double	8	Number of work hours for the day.
WorkHoursByHalfHour	string	000000000000 000011111111 001111111100 000000000000	Bit mask (48 bits) for each half hour of the day, indicating whether the half hour is work time. 0=nonwork time, 1=work time. The first bit represents 00:00-00:30, the second bit represents 00:30-01:00, etc.
WorkDayStartTime	date	9/20/07 8:00	Time of day when work first starts.
WorkDayFinishTime	date	9/20/2007 17:00:00 pm	Time of day when work stops.
IsBaseline	string	N	Set to 'Y' if this is a project calendar and the project is a baseline project.
isTemplate	string	Y	Set to 'Y' if project is a template project.

## Spreads

The following tables in the ODS contain spread bucket data:

- ▶ EPSSpread
- ▶ ProjectSpread
- ▶ WBSSpread
- ▶ ActivitySpread
- ▶ ResourceAssignmentSpread

Each spread table contains spread data columns. Each spread row contains the spread data for a given object (for example: EPS, project, or WBS) for a particular time period. The Spread data is aggregated from the Activity and Resource Assignment Spread tables to the WBS, project, and EPS Spread tables.

# Creating Reports in BI Publisher

This section provides general information about creating reports in BI Publisher. For complete information about using BI Publisher, see the documentation that comes with the product and the online help.

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### Creating a Folder for the Report

Before you create a report, create a folder to hold the report if the correct folder does not already exist.

- 1) Log onto BI Publisher, and click the **Reports** tab.
- 2) Click the **Create a new folder** link.
- 3) Enter a name for the folder.

Creating and adding permissions onto the folders in BI Publisher can prevent those users who do not have access to certain data from viewing these reports.

- ▶ BI Publisher enables the creation of a security model based on roles that will prevent users from accessing report inside of specific folders.
- ▶ Folder structures should be created and reports stored in specific folders based on the BI Publisher user's role.

### Creating the Report

On the BI Publisher Reports tab:

- 1) Click the folder in which you want to create the report.
- 2) Click the **Create a new report** link.
- 3) Enter a name for the report.

## Editing a Report

The menu items available for editing reports are described in the following table:

Menu Item	Description
Data Model	The Data Model enables you to select the data to be used for the report in forms such as: <ul style="list-style-type: none"><li>▶ SQL Query</li><li>▶ XML files</li><li>▶ Web Service</li><li>▶ Data Template</li><li>▶ Oracle BI Answers</li><li>▶ Oracle BI Discoverer</li><li>▶ File</li><li>▶ MDX Query</li></ul>
List of Values	Enables you to add filtering criteria on a report by using menus.
Parameters	Populate the List of Values.
Layouts	To use Layouts, you must install the BI Publisher Microsoft Word Add-on. This will enable you to create templates to add to your layouts. In Word, you must import your data from an XML file.

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## Exporting Data to an XML File

Exporting the data to XML makes it available for importing the data using the Microsoft Word BI Publisher plug-in. In BI Publisher, do the following:

- 1) Click **View**.
- 2) Select **XML** as the Data Type.
- 3) Click **Export**.

## Creating Report Templates

Do the following in Microsoft Word to create report templates:

- 1) Import the XML file containing the data. Use Microsoft Word to create your report templates.
- 2) Once the templates are complete, use the Microsoft Word BI Publisher plug-in to upload the templates for this report.
- 3) Go to Edit Report, Layouts, and choose the template you just uploaded. Click **View** to preview the report with the new template.

## Sample BI Publisher Reports

This section lists and describes the sample BI Publisher reports that are supplied with P6 Reporting Database. You can use these sample reports to display the various types of project and portfolio data you need. Running a report with the sample data provided will show all codes used in that report. When you run a report with your own data, and do not have that particular code defined, that code will not appear on the report.

### Activity Reports

#### Activity Look-Ahead Report

Enables the user to select a value for a number of weeks, and then shows the activities that are expected to be performed during that time frame.

#### Activity Relationships Report

Shows each activity with its relationships nested beneath.

Enables users to filter activities:

- ▶ By any attribute (such as Activity Code).
- ▶ By the activity's predecessor or successor based on the predecessor or successor attributes (such as Activity Code).

#### Calculated Fields

Enables users to perform calculations based on whichever data fields are exposed to the reporting engine. For example, display a list of activities and their durations. Create two new fields to capture Low estimate and High estimate. Low might be 80% of the Planned Duration, while High might be 125% of Planned Duration.

This would be an option for calculations that might some day be performed by a Global Change or expanded calculated UDFs.

#### Calendar Specifications

Used to create a single report that inventories all calendars that will also show where that calendar is used (projects and resources).

#### Cross-Project Relationships Report

Shows how projects impact other projects, and enables the use of the project schedule relationships defined by P6 EPPM. It does not open the project plan.

Shows relationships within a portfolio, and also to projects outside of the portfolio.

Shows the nature of the relationship. For example:

- ▶ It might show that project XYZ is linked to Project ABC via (2) activity relationships. ABC's task 101 (design system) has a predecessor from XYZ's task 3301 (finalize component design).
- ▶ It can show the status of these relationships (for example, project XYZ's tasks might have recently slipped and impact Project ABC).

This report enables users to notify P6 EPPM to take action.

### **Issues Report**

Can produce reports for both Issue and Risk logs.

Includes all related fields while enabling grouping, sorting, and filtering based on any field.

### **Planning Spreadsheet Data**

Enables users to create static reports based on data captured within the resource planning spreadsheet.

Provides options for formatting and printing.

Enables more flexible grouping and sorting of data.

Users can report on live spreadsheet data, even if their projects are set to summarize detailed resource data instead of high-level spreadsheet data.

### **Project Steps Hierarchy Report**

Shows the entire project breakdown including Project, WBS, activities and steps nested within a single view.

### **Project Template Mgmt**

Enables users (who must manage many project templates) to create a report that:

- ▶ Inventories the project templates.
- ▶ Lists the basic attributes or details of each template.

### **Role Assignments Report**

Shows which resources can fill each role.

### **Schedule Report with Notebooks**

Shows project activity information that includes the rich text information stored within Notebook fields.

Enables the user to choose which Notebook Topics to use for a given report.

## **Administrative Reports**

### **Responsibility Assignments Report**

Shows the OBS and projects to which each user has access.

### **Security Profile Privileges**

Shows which privileges are granted to each profile (both for Global and Project).

### **User Mgmt Report**

Creates a report that shows which users:

- ▶ Have access to P6.
- ▶ Have access to each module.
- ▶ Are assigned to each Global Profile.



## Project Reports

### Code Descriptions Report

Enables users to choose which Code Value field is displayed (Value ID versus Value Description).

### Document Assignment Report

Shows all documents within a single project, or across multiple projects.

Enables users to display or organize documents by any document attributes.

### Portfolio Scorecard Plus Report

A multi-project report that summarizes key project header data (dates, units, costs, codes, and UDFs) as well as other filtered data types (such as Notebooks, Issue, and Risks).

### Project Compliance

Enables users to create a report that:

- ▶ Shows which projects are following best practices and using the appropriate project settings.
- ▶ Can report across all projects or on a subset of projects.
- ▶ Can indicate which projects are exceptions.

### Project Ratings Report

Shows a bubble chart of the strategic financial rating for projects. Users can create a report for one or more projects. The report shows the at completion total cost for the project.

### Project Status Summary Report

Creates a single page report that summarizes the key points about a project's status and health.

This report is flexible enough to determine which fields and data types are included, since some customers might not use certain elements (for example, risks).

Typical data will include:

- ▶ All project header data (units, costs, dates, codes, UDFs, and Notebooks)
- ▶ Filtered data from activities and milestones, issues, risks, and resource teams

## Resource Reports

### FTE (Headcount) Report

Enables users to create a report that analyzes role usage over time periods.

It displays the usage in terms of headcount or FTEs (full time equivalent). For example, 3.5 people for January.

### Resource Code Assignments Report

A single report that shows which resources are assigned to each resource code.

Can be organized by resource to show which code assignments each individual resource has.

### **Resource Look-Ahead Report**

Shows resource assignment information to enable users to inform resources of the work that they should be focused on. The assignments show the project and activity to which each assignment belongs.

Shows key information about projects and activities within the same view as the assignment data (for example, codes and durations).

### **Resource Role Skill Sets Report**

Details the roles each resource can play.

### **Resource Spreads Grouped by Project Report**

Enables users to create a report to aid in analyzing resource demand versus supply. This report can organize, filter, sort, and stack by multiple attributes of both resources and projects.

Users can analyze resource and role teams, and then further organize, filter, sort, and stack by resource and project codes or activity codes. For example: Create a report that shows demand for part-time (R-code) resources in Asia-Pac (R-code), and stack by Project Type (P-code). Also show their limit line.

## **Sample Reports**

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