



Primavera P6 Configuration Needs Analysis

The problem

Many organizations over time have let their guard down with the governance of shared (global) configurations and the management of their P6 database(s) and data, as a result, the single source of truth becomes increasingly difficult to report on, trust or use.

The solution

Analyse each of the domains of database configuration, data, process and governance structures in order to identify issues and make recommendations to ensure the ongoing health and viability of the P6 installation.

SCOPE

Analysis and Recommendations surrounding Data, Structures, Processes and Governance include:

Analysis:

- Analyse Configuration data – Admin settings, categories etc.
- Analyse General P6 Information – number of projects, last scheduled, baselines, data dates etc.
- Analyse Global Data –EPS, OBS, Roles, Calendars, etc.
- Analyse Project, Activity, Financial and Resource Codes
- Analyse Security Profiles
- Analyse External Interfaces
- Analyse Governance Processes
- Analyse Administration Processes
- Analyse use of P6 through discussion with stakeholders

Recommendations:

- Opportunities for data cleansing of P6 database(s) to improve alignment and performance
- Actions to address issues relating to Global Data Structures
- Actions to address issues relating to Data Items in Databases (Project, Activity, Resource Codes etc.)
- Actions to ensure on going business alignment of Security Profiles
- Actions to address issues relating Governance and other Processes to ensure issues do not recur
- Actions relating to External Interfaces
- Actions relating to Data Archiving and Purge

DELIVERABLES

Needs Analysis (Document Deliverable)

This document is delivered in the following manner:

Executive Summary

Contains a summary of the key recommendations including levels of priority. The summary is followed by a detailed report which defines the observations and recommendations for each of the subject areas covered.

General P6 Installation

This section focuses on the overall P6 installation and use, covering such areas as:

1. P6 Database and Project Statistics
2. Business Practices
3. Governance
4. Administration

Global Configuration

This section focuses on analysing and providing recommendations on the Global Settings and all configuration options available when the database was configured are addressed. This document adheres to the following general order:

- | | |
|---|---------------------------|
| 1. Users | 7. Resources (RBS) |
| 2. Security Profiles | 8. Codes (Proj, Res, Act) |
| 3. Admin Preferences | 9. Roles |
| 4. Admin Categories | 10. Calendars |
| 5. Enterprise Project Structure (EPS) | 11. Cost Accounts |
| 6. Organizational Breakdown Structure (OBS) | 12. User Defined Fields |
| | 13. External Applications |
| | 14. Reports |

BENEFITS

Prescient Solutions Group's P6 Configuration Needs Analysis provides the client with the basis to take the next step and execute on the recommendations to cleanse the P6 database(s) and re-align coding structures, processes and governance to meet current and future business requirements, ensuring your ongoing return on the investment in P6.