



Viewing Reports Created with P6 Professional Report Editor in P6 EPPM

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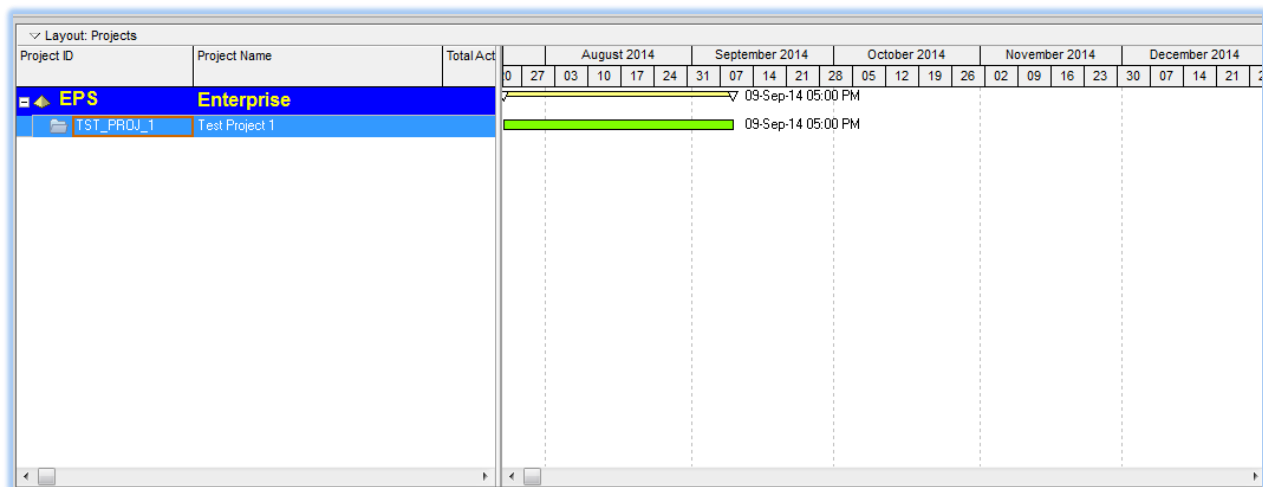
Prior to Primavera P6 Release 8.x, all reports created in P6 Professional Client using either the Report Wizard or Report Editor could also be viewed in P6 Web via the 'My Reports' portlet. Now that Oracle Business Intelligence (BI) Publisher is the reporting system of choice for all Primavera P6 releases post Primavera P6 Version 7.0, that native capability within P6 Web no longer exists.

This means that years of highly customized P6 Professional Client generated reports are essentially going to need to be rebuilt using BI Publisher XML or rely on P6 Professional Client batch reporting to automatically place the reports in a centralized location for offline viewing.

There is however another alternative. The Work Products (WP) and Document (Docs) functionality still exists in both P6 Professional Client and P6 Web. A report created with Report Editor would need to be assigned as a WPs & Docs element for a given P6 project and then placed in either a private or public file share location. Once there, and for a given project, P6 Web will also have access to the report and can display it using the WPs & Docs functionality contained in P6 Web.

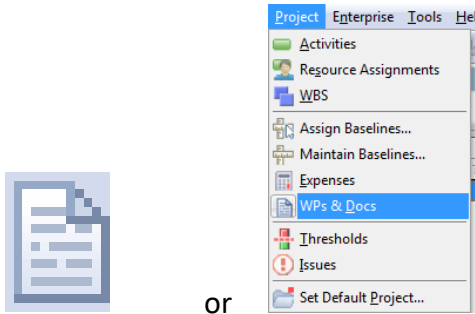
The following section describes the process.

1. Using P6 Professional Client, open a project and then navigate to the WPs & Docs window as shown.





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WPs & Docs

Title	Reference No.	Status	Document Category
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General | Description | Files | Assignments

Title: _____ Reference No.: _____

Version: _____ Document Category: [icon] Status: <None>

Revision Date: _____ Author: _____ Deliverable

2. Add a new WPs & Docs element to the project by right clicking or clicking the  button.

Title	Reference No.	Status	Document Category
 (New Document)			

3. You now have the option to associate additional attributes and assign files to the document as shown below:



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General Description Files Assignments

Title	Reference No.	
WPs & Docs Example		
Version	Document Category	Status
1	General Documents	<None>
Revision Date	Author	<input type="checkbox"/> Deliverable
15-Oct-14 12:00 AM		

General Description Files Assignments

Description

Test Example

Modify Print Copy

General Description Files Assignments

Private Location

Launch...

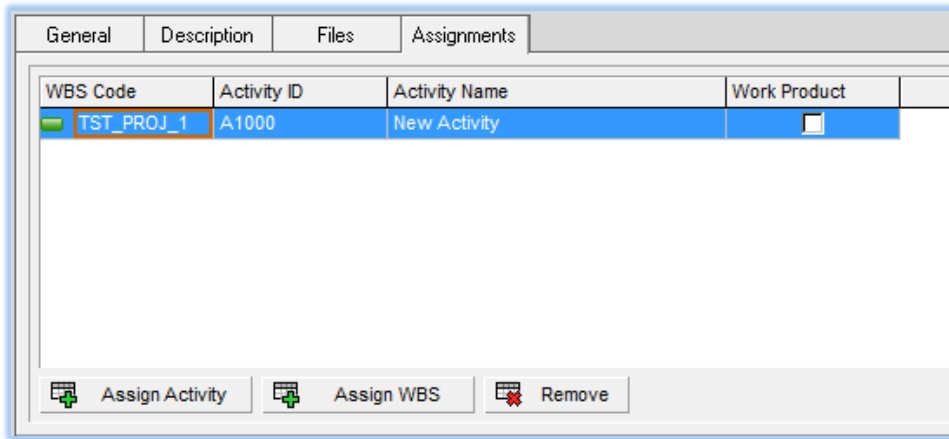
Public Location

U:\Tepco Excel Dashboard\Generic Dashboard Specification.xls

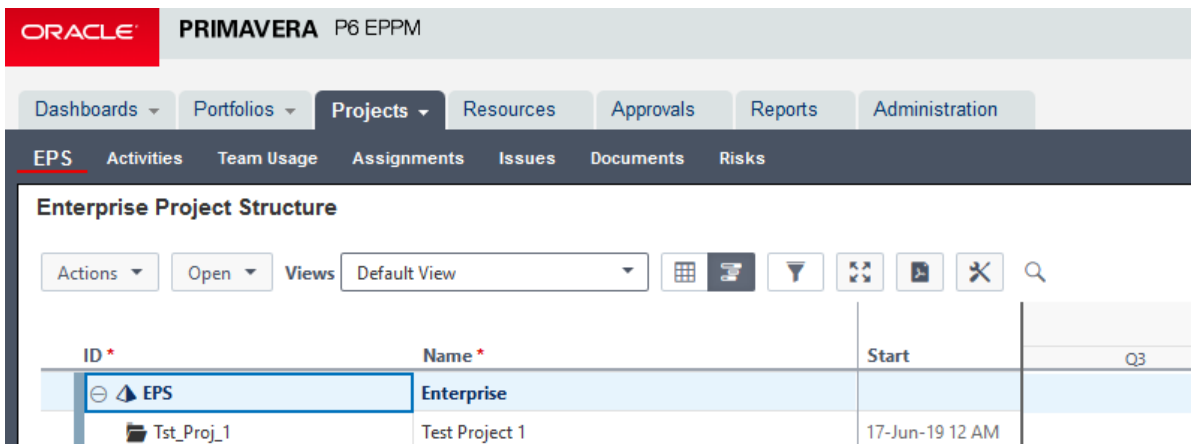
Launch...



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- Now that the work product and document has been assigned to the given project using P6 Professional Client, log into the P6 Web to view the same WPs and Docs report that has been attached.





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5. Navigate to and open the applicable P6 project that the WPs & Docs have been assigned.

Documents

The screenshot shows the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', 'Approvals', 'Reports', and 'Administration'. Below this, a secondary navigation bar highlights 'EPS' and includes 'Activities', 'Team Usage', 'Assignments', 'Issues', 'Documents', and 'Risks'. The main content area is titled 'Enterprise Project Structure' and features a toolbar with 'Actions', 'Open', 'Views' (set to 'Default View'), and various icons for grid, list, filter, refresh, print, and search. A table below displays project data:

ID *	Name *	Start	Q2	Q3
Tst_Proj_1	Test Project 1	17-Jun-19 12 AM		Test Project 1

The screenshot shows the Oracle Primavera P6 EPPM interface with the 'Documents' tab selected. The main content area is titled 'Documents of Test Project 1' and includes a toolbar with icons for refresh, print, delete, and search. Below the toolbar, a tree view shows the project structure:


- Test Project 1
 - (New Document)

6. Select the assigned WPs & Docs element



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The screenshot shows the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', 'Approvals', 'Reports', and 'Administration'. The 'Documents' sub-tab is selected under the 'Projects' menu. The main area displays the 'Documents of Test Project 1' form. The 'General' tab is active, showing fields for Title, Public Location, Private Location, Deliverable, Status, Author, Version, Revision Date, Owner, Document Category, and Reference Number. The 'Public Location' field is highlighted with a blue box, and an 'Open' button is visible next to it.

7. Click 'Open'  to view the report.

This close-up shows the 'Public Location' field in the P6 EPPM interface. The field contains the file path 'U:\Tepco Excel Dashboard\Generic Dashboard Specifica' and is followed by an 'Open' button. Below the field, there is a placeholder text 'Enter File Path or URL'.

The screenshot shows the content of the report. At the top, it displays '(New Project)' and 'Report Date 14-Oct-14 03:32 PM' on the left, and 'Project Start 23-Jul-14' and 'Project Finish 09-Sep-14' on the right. The main title is 'AC-01 Admin Categories'. Below the title, there is a section for 'User's Notes' with a horizontal line. The 'Baseline Types' section lists: Customer Sign-Off Baseline, Initial Planning Baseline, Management Sign-Off Baseline, Mid Project Status Baseline, and What-if Project Plan Baseline. The 'Expense Categories' section lists: Administration.