



ProjectVIEW^{ERP}

Cost Monitoring Solution

ProjectVIEW Primavera Connectivity

This section describes how a ProjectVIEW budget can be associated with a Primavera WBS

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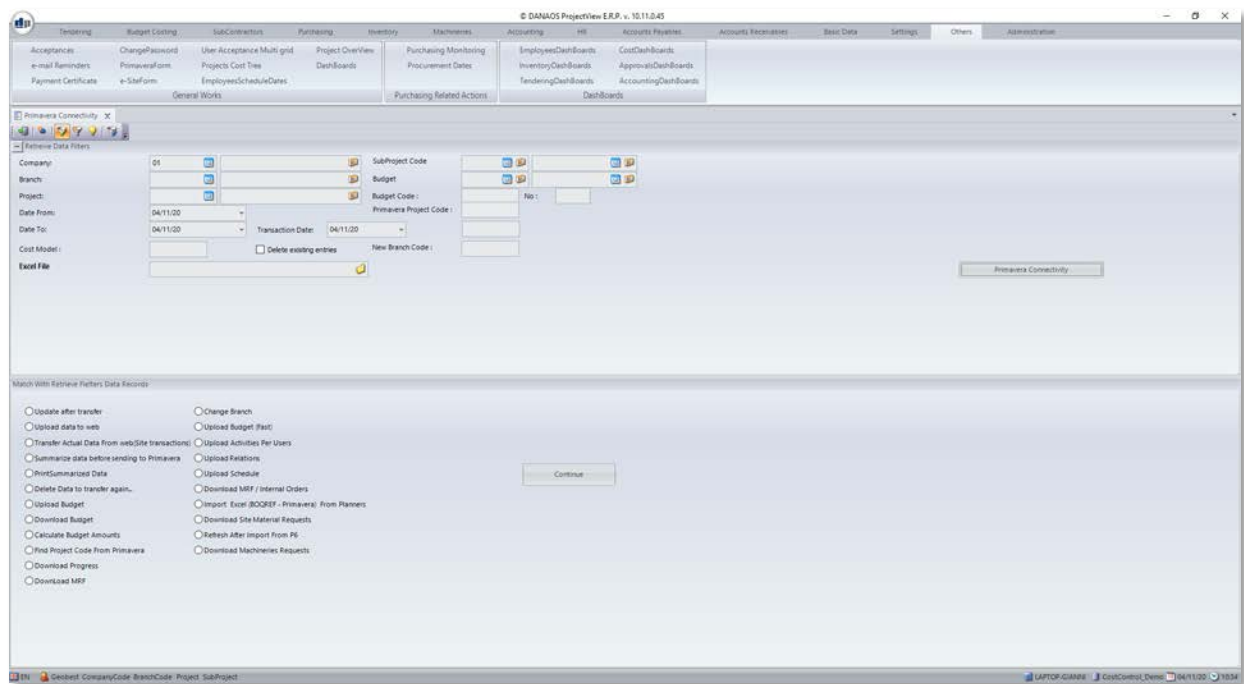
1 Transfer project from Primavera

In order to use and connect a Primavera project within ProjectVIEW, the project will have to be imported into the system.

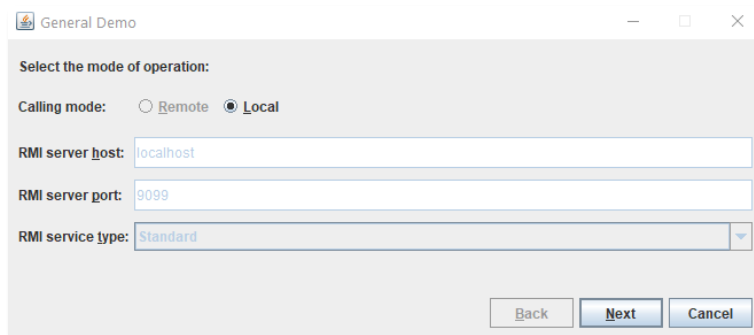
To do so, the user has to navigate to:

“Others” > “General Works” > “Primavera Form”

The following form will be displayed:



From this form, the *“Primavera Connectivity”* button must be clicked, which will display the following dialog box:



By clicking on “Next” the following screen is displayed. The user must enter the user name and password:

By clicking on “Next” the following screen is displayed:

In this screen the user must click on “P6 -> SQL” and enter a “ProjectID” (project code) and a “Budget Code” and click on “Next”. A new budget with the budget code entered will be created within the selected project.

Note

When importing a Primavera budget into ProjectVIEW, it is recommended for the new budget to have the suffix “-P” to distinguish it from other budgets.

2 Primavera Relations

Having imported a Primavera budget (See. P6 to SQL above), the user must now connect the BOQ lines of a budget with the WBS activities of the imported Primavera budget.

To do so, the user has to navigate to:

“Budget Costing” > “Relations” > “Budgets Relations”

This will display the following form:

There are two empty grids in this form; the left one is titled *“Budget Records From”* and the right one is titled *“Budget Records To”*.

Right above each of these grids, there are a number of buttons, which sort each grid according to their title. Clicking on the *“Clear”* button will reset the grid’s sorting.

There is also a search box, which allows to filter the grid using a text search.

To connect a BOQ budget to a Primavera budget, the user must these steps:

2.1 Add project parameters

The first step is to add the following parameters in the top of the form:

- ✓ Company
- ✓ Branch
- ✓ Project
- ✓ SubProject (optional)

These will allow ProjectVIEW to narrow the selection of budgets to those belonging to the project in question.

2.2 Add budgets

The next step is to add two budgets:

- ✓ Using “*Budget From*” (left side), the user must select the **BOQ** budget
- ✓ Using “*Budget To*” (right side), the user must select the **Primavera** budget

As soon as each budget has been selected, its respective grid will be populated with the budget’s lines.

At the end of this step, the BOQ budget’s lines should appear in the left grid, while the Primavera budget’s on the right.

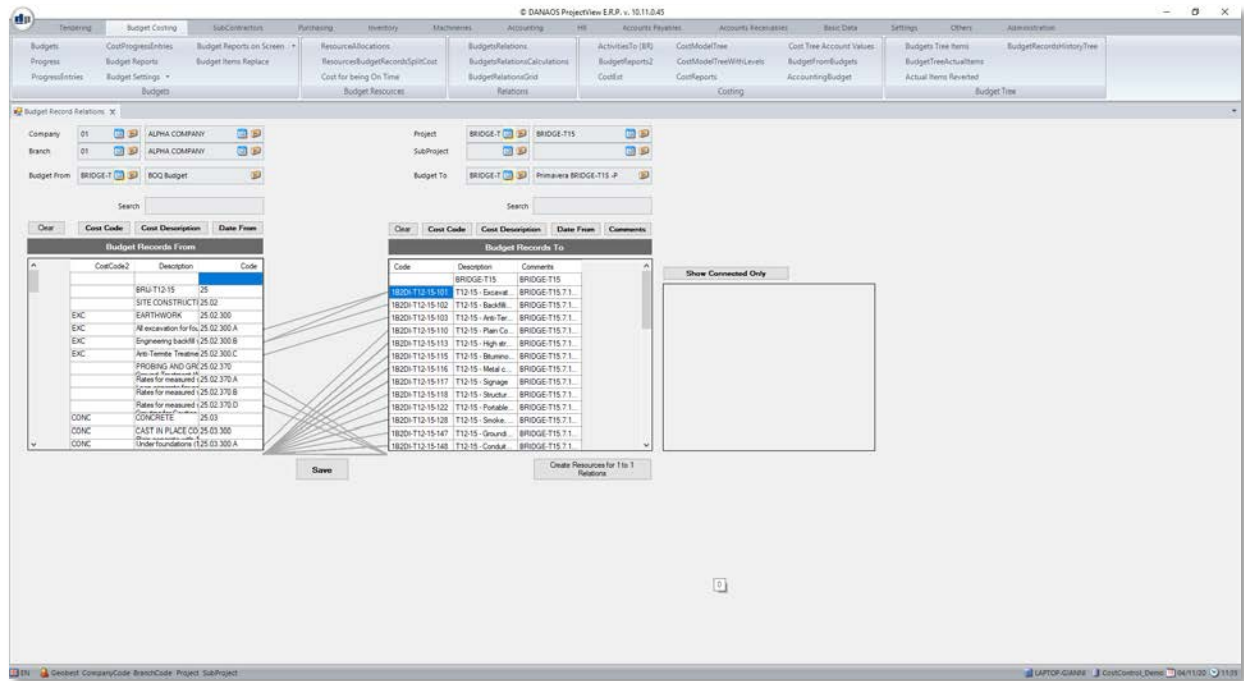
As mentioned in the beginning of the chapter, the following keys and search box located just above each grid can help the user sort and filter the grids:

- ✓ Clear (remove sorting)
- ✓ Cost Code
- ✓ Cost Description
- ✓ Date From
- ✓ Comments

2.3 Connect budget lines

The final step is to connect a line from one budget to a line of the other. This can easily be done with a drag-and-drop operation.

The user must drag a line from one grid and drop it on a line in the other. For every drag-and-drop, a line connecting the two grids will appear, denoting a connection between the two budgets.



The last thing to do is to save clicking on the “Save” button.

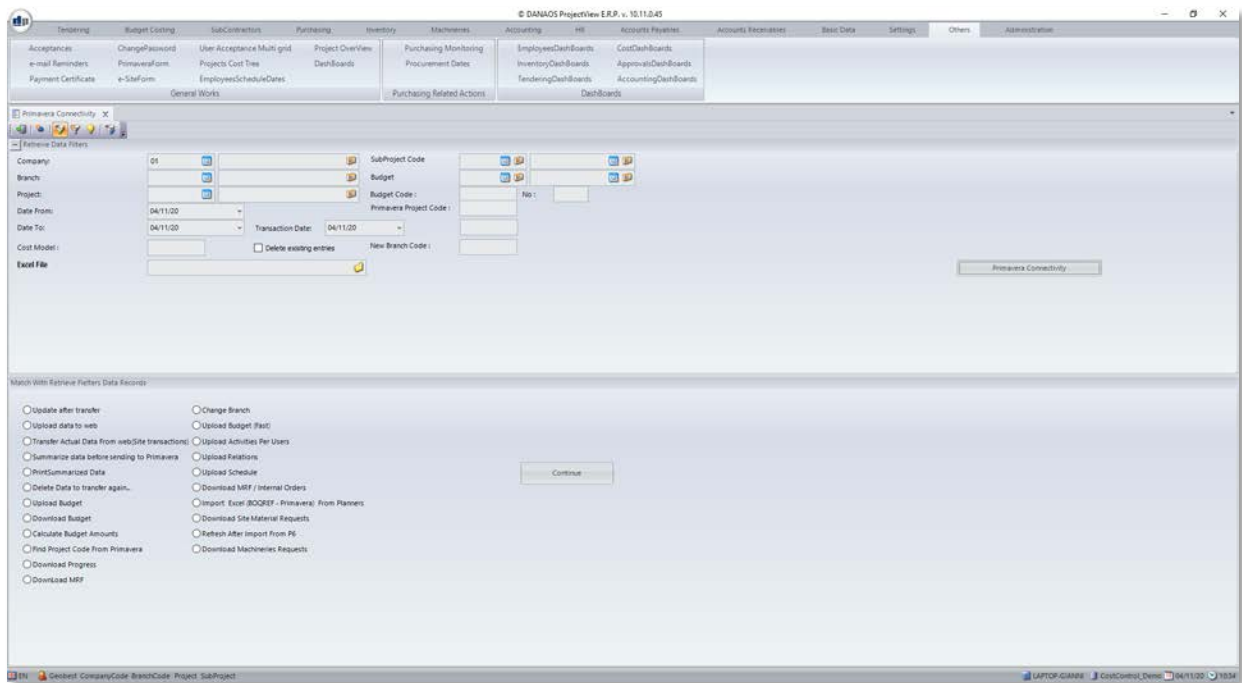
3 Transfer project to Primavera

If needed, a budget can be exported to Primavera

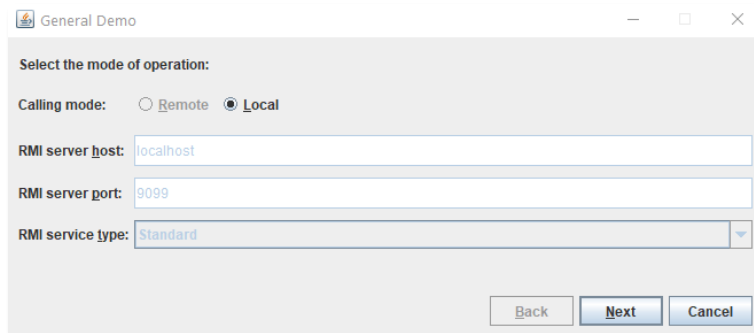
To do so, the user has to navigate to:

“Others” > “General Works” > “Primavera Form”

The following form will be displayed:



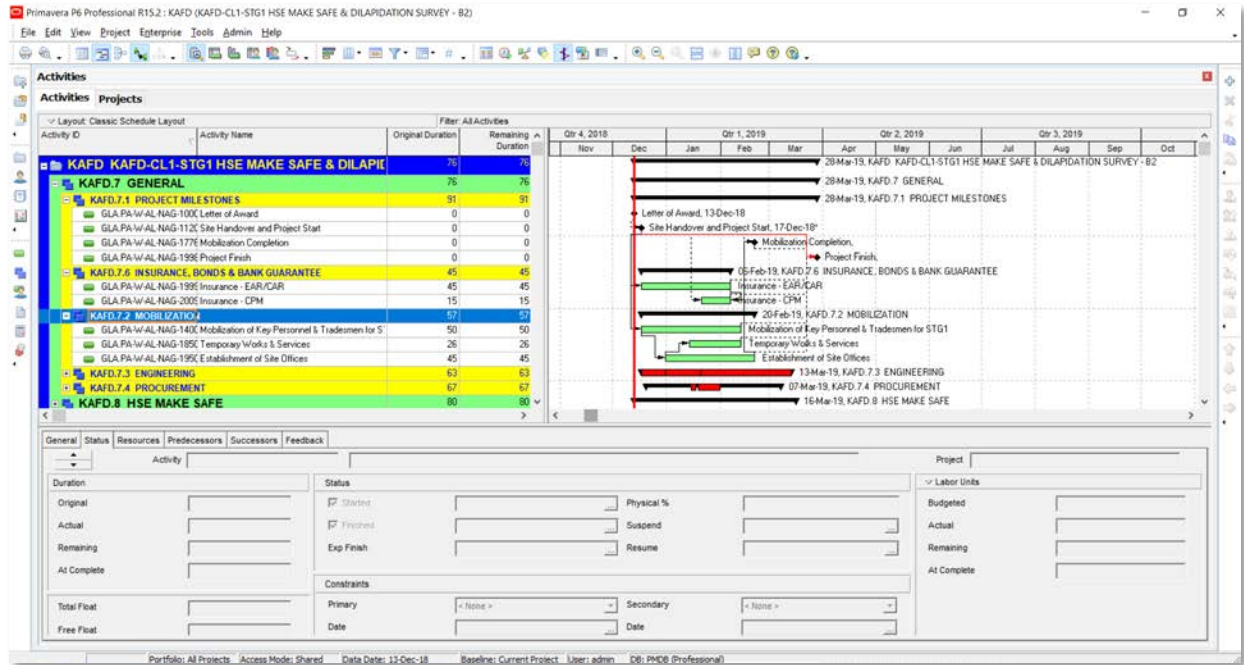
From this form, the *“Primavera Connectivity”* button must be clicked, which will display the following dialog box:



By clicking on *“Next”* the following screen is displayed. The user must enter the user name and password:

By clicking on “Next” the following screen is displayed:

In this screen the user must click on “SQL -> P6” and enter a “ProjectID” (project code) and a “Budget Code” and click on “Next”. The budget entered along with its resource analysis will be imported into Primavera.



In this case, the system not only transfers the budget lines to Primavera, but also creates new resources (if they do not exist) and creates the relation between Activities and Resources.

The resources are:

- ✓ Material
- ✓ Specialties or Employees
- ✓ Machinery Types or Machineries

For all the above type of resources there are fields inside ProjectView named: Primavera Code, which is a number showing the internal resource code in Primavera P6.

Note:

In ProjectVIEW there is a tree analysis with unlimited levels. In order for the system to understand which lines are part of the WBS (upper level of the tree) and which lines are the activities (the lines of the last level , are the lines which have the Quantities), the user must click the checkbox “Is Activity” on the budget analysis screen before transferring the budget.



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