

Step by Step – How to Add A New WBS

In Primavera P6

By

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Decision Making Credibility

Create Work Breakdown Structure:
is the 5.4 process in

This training introduces how to add new WBS and the benefits of having WBS

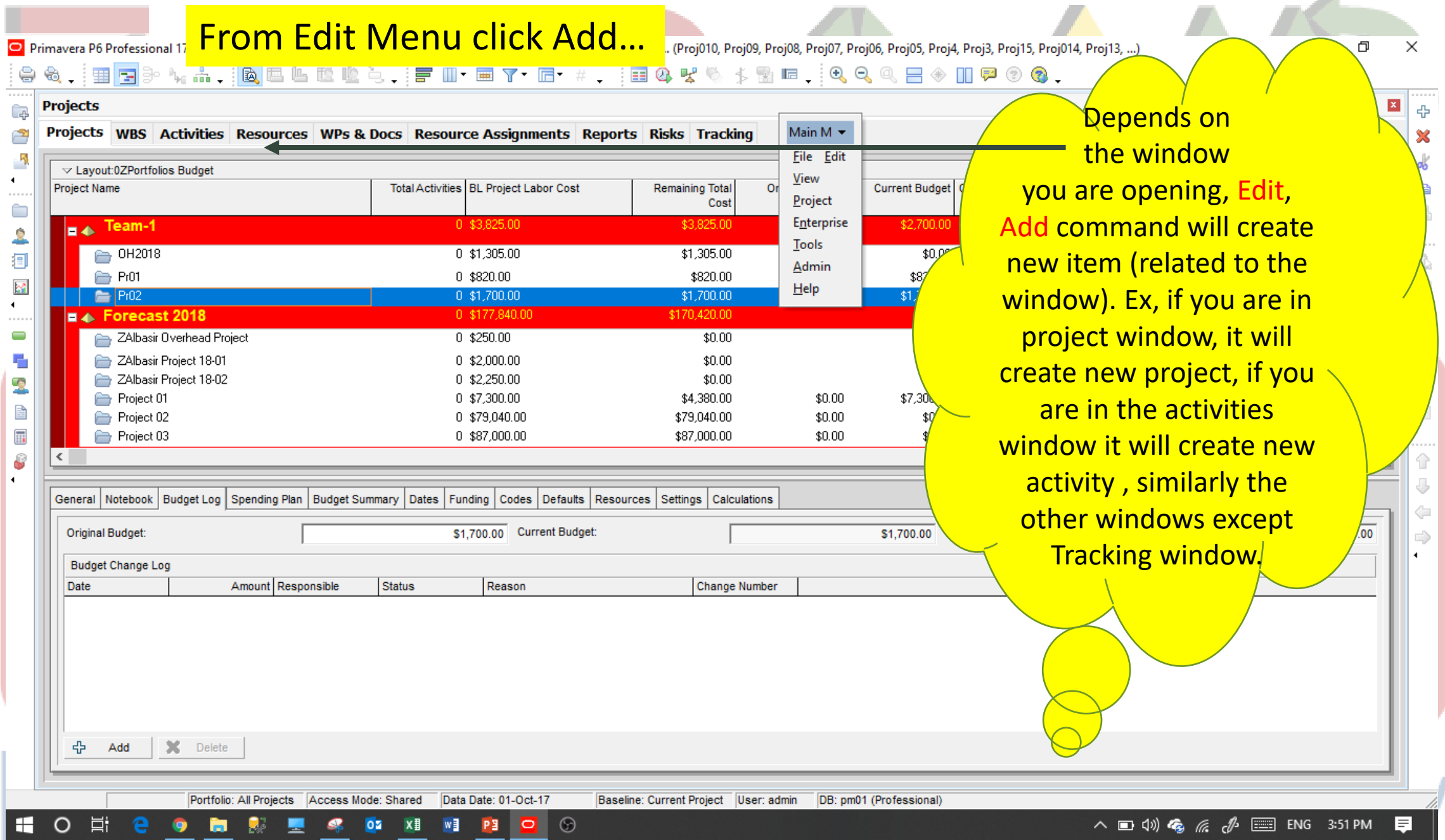
Work Breakdown Structure

(WBS) is a grouping of project activities that organizes and defines the total scope of the project. Each descending level represents an increasingly detailed definition of a project component.

- How to add new WBS.
- How to add new WBS within WBS.
- How to organize the layers of the WBSs

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From Edit Menu click Add...



From Edit Menu click Add...



Projects

Projects WBS Activities Resources WPs & Docs Resource Assignments Reports Risks Tracking

Main M

- File
- Edit
- View
- Project
- Enterprise
- Tools
- Admin
- Help

Project Name	Total Activities	BL Project Labor Cost	Remaining Total Cost	Original Budget	Current Budget
Team-1	0	\$3,825.00	\$3,825.00		
DH2018	0	\$1,305.00	\$1,305.00		
Pr01	0	\$820.00	\$820.00		
Pr02	0	\$1,700.00	\$1,700.00		\$1,700.00
Forecast 2018	0	\$177,840.00	\$170,420.00	\$0.00	\$0.00
ZAlbasir Overhead Project	0	\$250.00	\$0.00	\$0.00	\$0.00
ZAlbasir Project 18-01	0	\$2,000.00	\$0.00	\$0.00	\$0.00
ZAlbasir Project 18-02	0	\$2,250.00	\$0.00	\$0.00	\$0.00
Project 01	0	\$7,300.00	\$4,380.00	\$0.00	\$7,300.00
Project 02	0	\$79,040.00	\$79,040.00	\$0.00	\$0.00
Project 03	0	\$87,000.00	\$87,000.00	\$0.00	\$0.00

General Notebook Budget Log Spending Plan Budget Summary Dates Funding Codes Defaults Resources Settings Calculations

Original Budget: \$1,700.00 Current Budget: \$1,700.00 Proposed Budget: \$1,700.00

Budget Change Log						
Date	Amount	Responsible	Status	Reason	Change Number	

+ Add X Delete

Projects

Projects Resources Reports Tracking

Layout: OZPortfolios Budget

Project Name	Total Activities	BL Project Labor Cost	Remaining Total Cost	Original Budget	Current Budget	Cu
Galaxy GEPPM	0	\$0.00	\$0.00		\$0.00	
Galaxy EPPM Project No.1						
(New Project)						
Budget 2018						
OH2018						
(New Project)						
AlbasirZ EPPM01						
Team-1						
OH2018						

Create a New Project

Select EPS

Select the Enterprise Project Structure level for the new project.

Create New Project Wizard opened. Refer to Create New Project Video.

Select EPS

Galaxy GEPPM

Cancel

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From Edit Menu click Add...

WBS

←

Projects WBS Activities Resources Reports Tracking

Layout: WBS

WBS Code	WBS Name	Total Activit
Pro 01	Galaxy EPPM Project No.1	
Pro 01.2	(New WBS)-1	
Pro 01.1	(New WBS)	

Be Sure you have an opened project and you are in WBS window.
Define where the WBS will be created.
In the example on the left , it will be a child WBS under Pro 01.2



WBS

Activities Projects **WBS**

Layout: WBS

WBS Code	WBS Name	Total Activities	2021			2022			2023			2024			2025		
			Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Pro 01	Galaxy EPPM Project No.1	1															
Pro 01.2	(New WBS)-1	0															
1	(New WBS)	0															
Pro 01.1	(New WBS)	0															

New WBS Created under Pro 01.2 . Refer to Create New WBS Video.

General Notebook Budget Log Spending Plan Budget Summary **WBS Milestones** WPs & Docs Earned Value

<p>Budget</p> <p>Current Budget <input type="text" value="\$0.00"/></p> <p>Unallocated Budget <input type="text" value="\$0.00"/></p> <p>Distributed Current Budget <input type="text" value="\$0.00"/></p>	<p>Variance</p> <p>Current Variance <input type="text" value="\$0.00"/></p>	<p>Spending Plan</p> <p>Total Spending Plan <input type="text" value="\$0.00"/></p> <p>Undistributed Current Variance <input type="text" value="\$0.00"/></p> <p>Total Spending Plan Tally <input type="text" value="\$0.00"/></p>	<p>Benefit Plan</p> <p>Total Benefit Plan <input type="text" value="\$0.00"/></p> <p>Total Benefit Plan Tally <input type="text" value="\$0.00"/></p>
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From Edit Menu click Add...

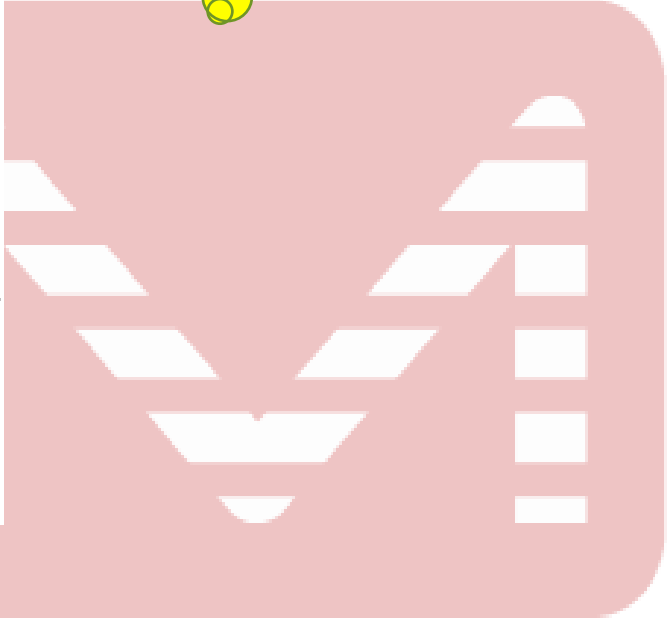
Be Sure you have an opened project and you are in activities window

Activities

Activities Projects WBS

Layout: Z Resource Cost Profile_1 Filter: All Activities

Activity ID	Activity Name	Original Duration	Budgeted Labor Units	Sta	No
Total		5.00d	0.00h	02	
Pro 01 Galaxy EPPM Project No.1		5.00d	0.00h	02	
A1000	New Activity	5.00d	0.00h	02	
Pro 01.1 (New WBS)		0.00d	0.00h		
Pro 01.2 (New WBS)-1		0.00d	0.00h		
Pro 01.2.1 (New WBS)		0.00d	0.00h		



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Activities

Activities Projects WBS

Layout: Z Resource Cost Profile_1

Filter: All Activities

Activity ID	Activity Name	Original Duration
Total		
Pro 01 Galaxy EPPM Project No.1		
A1000	New Activity	5.00
Pro 01.1 (New WBS)		
Pro 01.2 (New WBS)-1		
A1010	New Activity	5.00
Pro 01.2.1 (New WBS)		

New Activity

Activity Name

Enter an Activity ID and Activity Name. The Activity ID uniquely identifies the activity.

Create New Activity Wizard opened. Refer to Create New Activity Video.

Activity ID

A1010

Activity Name

New Activity

Do not show this wizard again.

Cancel

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From Edit Menu click Add...

Resources

Activities Resources Projects WBS

▼ Display: All Resources

Resource ID	Resource Name	Resource Type	Unit of M
Temp Resources	Temp Resources	Labor	
Re1Rt1	Res1-Rt1	Labor	
Re1Rt2	Re1Rt2	Labor	
Re1Rt3	Re1Rt3	Labor	
R210139.17	R210139.17	Labor	
R210139.15	R210139.15	Labor	
R210139.18	R210139.18	Labor	
R210139.16	R210139.16	Labor	
R210139.19	R210139.19	Labor	
R210139.13	R210139.13	Labor	
R210139.12	R210139.12	Labor	

General Codes Details Units & Prices Roles Notes

Shift Calendar: Shift: 1

Be Sure you are in Resources window. Define where the Resources will be created. In the example on the left, it will be a child resource under Temp Resources

Resources

Resources Projects

▼ Display: All Resources

Resource ID	Resource Name	Resource Type	Unit of Measure	Primary Role	Default Units / Time
Temp Resources	Temp Resources	Labor			10.00h/d
R	(New Resource)	Labor			10.00h/d
Re1Rt1	Res1-Rt1	Labor			
Re1Rt2	Re1Rt2	Labor			
Re1Rt3	Re1Rt3	Labor			
R210139.17	R210139.17	Labor			
R210139.15	R210139.15	Labor			
R210139.18	R210139.18	Labor			
R210139.16	R210139.16	Labor			
R210139.19	R210139.19	Labor			
R210139.13	R210139.13	Labor			

General Codes Details Units & Prices Roles Notes

Shift Calendar: [Person Icon] Shift: 1

Effective Date	Price / Unit4	Price / Unit5	Standard R
01-Jan-18	\$0.00/h	\$0.00/h	\$0.00

New Resource Wizard

Resource ID and Name

Enter a Resource ID and a Resource Name. The Resource ID uniquely identifies this resource.

Resource ID: R

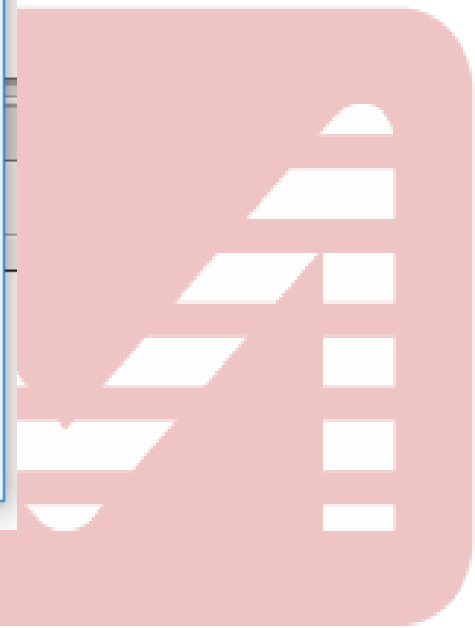
Resource Name: (New Resource)

Do not show this wizard again.

Cancel Prev Next Finish



New Resource Wizard
opened
Refer to Create New Resource
Video.



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From Edit Menu click Add...

Reports

Resources Reports Projects

Display: All Reports

Report Name	Report Scope	Last Run D
Report Group: Standard PMO Reports		
Report Group: Administration & Security		
CV-02 Resource Code Values	Global	03-Sep-
CV-03 Activity Code Values	Global	
GS-01 Users by Global Security Profile	Global	
GS-02 Global Security Profile Privileges	Global	16-Apr-18
GS-03 OBS User Security Profiles	Global	
OB-01 OBS Assignment By Users	Global	16-Apr-18
PS-01 Project Security Profile Privileges	Global	
Report Group: Resources		
RS-01 Resource Details	Global	16-Apr-18
RS-02 Resource Rates	Global	

Be Sure you are in Reports window

Decision Making Credibility

Reports

Resources Reports Projects

Display: All Reports

Report Name

Report Group: Standard PMO Reports

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- CV-02 Resource Code Values
- CV-03 Activity Code Values
- GS-01 Users by Global Security Profile
- GS-02 Global Security Profile Privileges
- GS-03 OBS User Security Profiles
- OB-01 OBS Assignment By Users
- PS-01 Project Security Profile Privileges

Report Group: Resources

- RS-01 Resource Details
- RS-02 Resource Rates
- RS-03 Resource Role Skillsets
- RS-04 Role Responsibilities

Report Group: All Projects/Portfolio Analy

Report Group: Project/WBS Details

- EP-01 EPS, Project, and WBS Notebook Items
- EP-02 EPS, Project Responsibility Assignment
- PP-01 EPS, Project Details
- WB-01 WBS Dictionary
- WB-02 WBS Summary

Report Wizard

Create or Modify Report

You can create a new report, or a report based on the previous screen display (e.g., Activities, WBS, Expenses).

To modify a report created by the wizard, go to the Reports screen, select the report, and click on the Wizard button.

- New Report
- Use Current Screen
- Modify Wizard Report

Create New Activity
opened.

Refer to Create New Report
Video.

Cancel

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Finish

From Edit Menu click Add...

Be Sure you are in Resources window. Define where the Resources will be created. In the example on the left , it will be a child resource under Temp Resources

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Resources

Resources Projects

▼ Display: All Resources

Resource ID	Resource Name	Resource Type	Unit of Measure	Primary Role	Default Units / Time
Temp Resources	Temp Resources	Labor			10.00h/d
R	(New Resource)	Labor			10.00h/d
Re1Rt1	Res1-Rt1	Labor			
Re1Rt2	Re1Rt2	Labor			
Re1Rt3	Re1Rt3	Labor			
R210139.17	R210139.17	Labor			
R210139.15	R210139.15	Labor			
R210139.18	R210139.18	Labor			
R210139.16	R210139.16	Labor			
R210139.19	R210139.19	Labor			
R210139.13	R210139.13	Labor			

General Codes Details Units & Prices Roles Notes

Shift Calendar: [Icon] Shift: 1

Effective Date	Price / Unit4	Price / Unit5	Standard R
01-Jan-18	\$0.00/h	\$0.00/h	\$0.00

New Resource Wizard

Resource ID and Name

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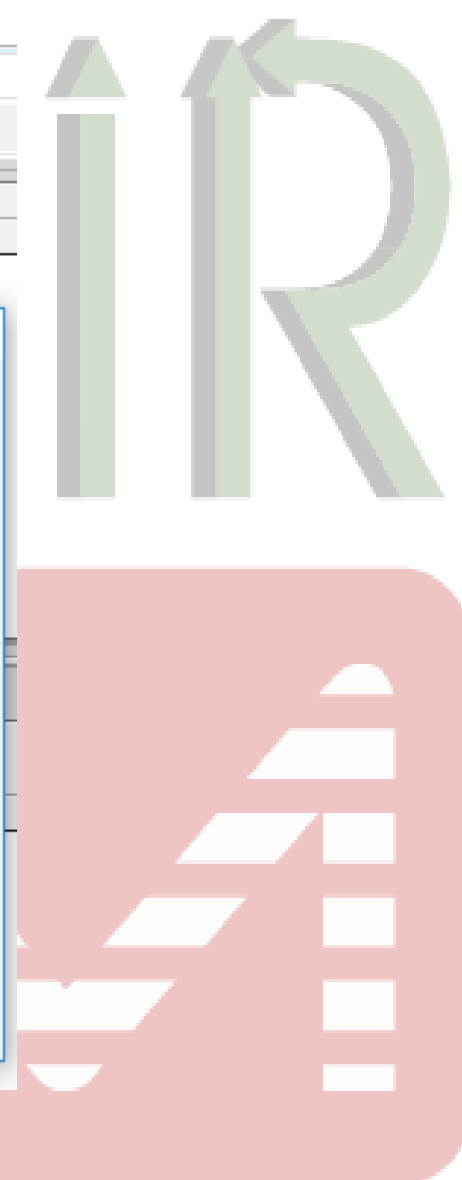
Resource ID: R

Resource Name: (New Resource)

Do not show this wizard again.

Cancel Prev Next Finish

New Resource Wizard
opened
Refer to Create New Resource
Video.



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From Edit Menu click Add...

Reports

Resources Reports Projects

Display: All Reports

Report Name	Report Scope	Last Run D
Report Group: Standard PMO Reports		
Report Group: Administration & Security		
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CV-03 Activity Code Values	Global	
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GS-03 OBS User Security Profiles	Global	
OB-01 OBS Assignment By Users	Global	16-Apr-18
PS-01 Project Security Profile Privileges	Global	
Report Group: Resources		
RS-01 Resource Details	Global	16-Apr-18
RS-02 Resource Rates	Global	

Be Sure you are in Reports window

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Reports

Resources Reports Projects

Display: All Reports

Report Name

Report Group: Standard PMO Reports

Report Group: Administration & Security

- CV-02 Resource Code Values
- CV-03 Activity Code Values
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- GS-02 Global Security Profile Privileges
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Report Group: Resources

- RS-01 Resource Details
- RS-02 Resource Rates
- RS-03 Resource Role Skillsets
- RS-04 Role Responsibilities

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- New Report
- Use Current Screen
- Modify Wizard Report

Create New Activity
opened.

Refer to Create New Report
Video.

Cancel

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Done

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