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Guidance on Network Rail Oracle Projects and Primavera interface

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1 Purpose

This Guidance Note forms part of the suite of documents comprising the Planning and Programme Controls standard.

This Guidance Note is being shared on behalf of Network Rail in relation to specific business benefits. It should not be circulated or shared further without express permission of Network Rail.

2 Scope

This Guidance Note outlines the operational elements of the bespoke Network Rail Oracle Projects to Primavera interface and the six discrete transactions that can be undertaken.

The interface enables the each project managed within Oracle Projects to be directly linked to a schedule being managed within the IMS Primavera database. This linkage enables the ongoing communication of project financials and update of project personnel on dynamic basis.

The guidance provides information about how to trigger the operation of each of the interface elements from either Oracle Projects or Primavera.

Appendix A lists some key do's and don'ts when undertaking two of the key transactions from Primavera to Oracle Projects – Proposal Estimate and Period End.

3 Steps for OP to Primavera interface

3.1 Introduction

There are six interfaces between OP and Primavera as illustrated in Figure 1.

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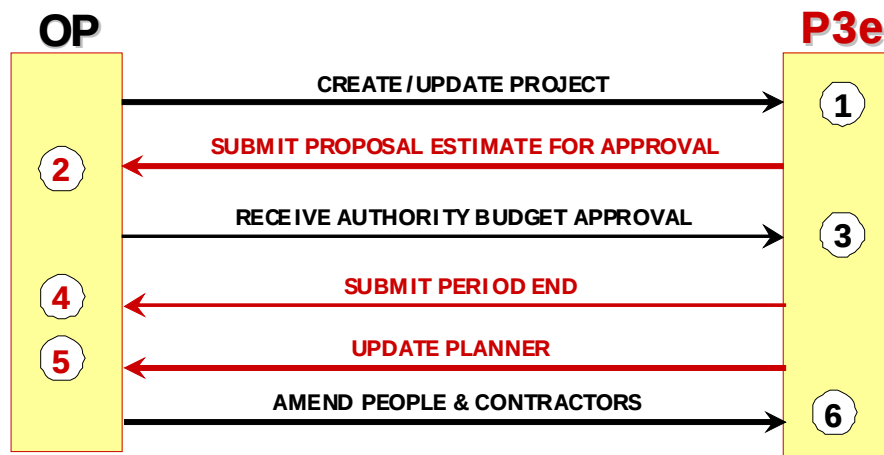


Figure 1 – Interfaces between OP and Primavera

4 Create/Update Project

4.1 General

The Create/Update Project interface includes the following functions:

- Create Project (4.2);
- Interface Tasks to Primavera (4.3); and
- Project Status Update (4.4).

4.2 Create Project

The following steps describe how to create a project to trigger the interface to Primavera :

- Login to Oracle Projects as a user with the Projects – Commercial Assistant NRIMS responsibility.
- Select Project Delivery > Create Project in the Navigator.
- Select the 3rd Party Funded project template from the list.
- Click on Apply.
- Enter the mandatory values in Quick Entry as shown in Table 1.

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Prompt	Enter Text
Project Number	<Automatic Numbering>
Project Name	e.g. OP Test no
Project Description	e.g. OP Test no
Organization	MP Civils TLNE G2
Project Start Date	01-APR-2005
Project Finish Date	31-DEC-2005
Multi-Asset Classification	Single
Multi-Funding Classification	Single
Funding Category	Renewals
Asset Category	S&C
National Programme	
Local Programme	
Territory	South East
Project Manager	Alan Potts
Program Manager	
Project Accountant	Samie Agiri
Project Controls Manager	Alan Potts
Project Planner	Jason Hayter
Project Commercial Assistant	Paul Johnstone
Quantity Surveyor	Paul Johnstone
Project Member	
Project Engineer	

Table 1 – Mandatory values in Quick Entry

- f) Click Apply to create project in OP and trigger the interface to Primavera .
- g) To view the project, open internet explorer > favourites > Network Rail > Citrix NFuse and select the icon to commence log in.
- h) Select Open Global Data then Projects. The project created in OP should be in the list of Primavera projects in the new projects EPS node. *Note – the Principle Programme Planner will relocate this new project into the appropriate EPS node for the project planner to access.*
- i) Check the following fields match up with OP: Project ID, Project Manager, Project Planner, Project Name and Start Date.

4.3 Interface tasks to Primavera

The following steps describe how to create a task in OP triggering the interface to update an existing project in Primavera :

- a) Login to Oracle Projects as a user with the Projects – Commercial Assistant NRIMS responsibility for the project that is to be updated.
- b) Select Project Delivery > Project List in the Navigator.

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- c) Click on the project number to be updated and select the Workplan tab.
- d) Select the Update Work Breakdown Structure button and expand the task structure.
- e) Select the parent of the task to be created and click on the Create Tasks button.
- f) Choose “1” from the Outline drop down list and enter the Task Number, Task Name, Scheduled Start Date, and Scheduled End Date for the new task.
- g) Click Apply to update the project in OP with the new task and to trigger the interface to Primavera .
- h) To view the project, open internet explorer > favourites > Network Rail > Citrix NFuse and select the icon to commence log in.
- i) Select Open Global Data then Projects. Select the updated project from the list of Primavera projects, right click to bring up a pop-up menu, select Open Project.
- j) To view the new task in Primavera select Activity Codes from the Enterprise menu, check the project radio button and display all values.

4.4 Project status update

The project status update occurs when the “GRIP” stage changes on the OP project. The following steps describe how to change the project status for a project in OP triggering the interface to update an existing project in Primavera :

- a) Login to Oracle Projects as the user with the Projects – Commercial Assistant NRIMS responsibility for the project that is to be updated.
- b) Select Project Delivery > Project Sets in the Navigator. Create a project set for the project to be updated and then view the project in the NR WIP Review screen.
- c) To change the status on a project, budget has to be allocated to tasks on an unopened Stage (see clause 5, *Submit proposal estimate for approval* and clause 6, *Receive authority budget approval*).
- d) Verify that the creation of the new Authority and Project Budgets has updated the project status by viewing the project in the Project Home page.
- e) To view the project, open internet explorer > favourites > Network Rail > Citrix NFuse and select the icon to commence log in
- f) Select Open Global Data then Projects. Select a project from the list of Primavera projects. Select the Codes tab in the bottom half of the screen. The OP Status in Primavera should have the same value as the project status in OP.