

2018

Oracle Primavera P6[®] Fundamentals Courses



Project Management Training Program

PMVISION Training

Primavera p6 Fundamentals Course

Course Description

The Primavera P6 Training Course will prepare you for efficiently track your project teams, schedules, tasks and finances manage your entire project and accurately report your progression to date. This instructor-led course presents the basic concepts of Oracle Primavera P6. You will create a project plan containing tasks, organize these tasks in a work breakdown structure containing task relationships, create and assign resources, finalize the project to implement the project plan and keep your projects on time and within budget.

Course Agenda

Day 1 Modules

1. Introduction
 - Purpose
 - Required Background Knowledge
 - Purpose of Planning
 - Project Planning Metrics
 - Planning Cycle
 - Levels of Planning
 - Monitoring and Controlling a Project

2. Creating a Project Plan
 - Understanding Planning and Scheduling Software
 - Enterprise Project Management
 - Understanding Your Project
 - Level 1 – Planning Without Resources
 - Creating Projects
 - Defining the Calendars
 - Defining the Project Breakdown Structures
 - Adding Activities

- Adding the Logic Links
- Developing a Closed Network
- Scheduling the Project
- Critical Path
- Total Float
- Free Float
- Relationship Colors
- Constraints Types
- Project Constraints
- Activity Constraints
- Risk Analysis
- Contingent Time
- Formatting the Display – Layouts and Filters
- Printing and Reports
- Issuing the Plan
- Level 2 – Monitoring Progress Without Resources
 - Setting the Baseline
 - Tracking Progress
 - Corrective Action
- Level 3 – Scheduling With Resources, Roles and Expenses
 - Estimating or Planning for Control
 - The Balance Between the Number of Activities and Resources
 - Creating and Using Resources
 - Creating and Using Roles
 - The Relationship Between Resources and Roles
 - Activity Type and Duration Type
 - Budgets
 - Resource Usage Profiles and Tables
 - Resource Optimization
- Level 4 – Monitoring and Controlling a Resourced Schedule
 - Monitoring Projects with Resources
 - Controlling a Project with Resources

3. Starting Up and Navigation

- Logging In
 - The Projects Window

- Project Window Top Pane
- Project Window Bottom Pane Details Tab
- Opening One or More Projects
- Displaying the Activities Window
- Opening a Portfolio
- Top and Bottom Panes of Windows
- User Interface Update
 - New Customizable Toolbars
 - Customizable menus
 - Status Bar
- User Preferences
 - Time Unit Formatting
 - Date Formatting
- Starting Day of the Week
- Admin Preferences – Set Industry Type
- Application of Options within Forms
- Do Not Ask Me About This Again
- Right-clicking with the Mouse
- Accessing Help
- Refresh Data – F5 Key
- Commit Changes – F10 Key
- Send Project
- Closing Down
- Workshop – Navigating Around the Windows

4. Creating a New Project

- Creating a Blank Project
- Copy an Existing Project
- Importing a Project
 - Primavera File Types
 - Non Primavera File Types
- Setting Up a New Project
- Project Dates
- Saving Additional Project and EPS Information – Notebook Topics
- Workshop – Creating Your Project

5. Defining Calendars

- Database Default Calendar
- Accessing Global and Project Calendars
- The Project Default Calendar
 - Understanding the Project Default Calendar
 - Assigning a Default Project Calendar
- Creating a New Global or Project Calendar
- Resource Calendars
 - Creating a New Shared Resource Calendar
 - Creating New Personal Resource Calendars
 - Personal and Shared Calendars Calculation and Display
- Move, Copy, Rename and Delete a Calendar
 - Moving a Project Calendar to Global
 - Copy a Calendar from One Project to Another
 - Renaming a Calendar
 - Deleting a Calendar
- Editing Calendar Working Days
- Inherit Holidays and Exceptions from a Global Calendar
- Adjusting Calendar Working Hours
 - Editing Calendar Weekly Hours
 - Editing Selected Days Working Hours
 - Editing Detailed Work Hours/Day
- Calculation of Activity Durations in Days, Weeks or Months
- Calendars for Calculating Project, WBS and Other Summary Durations
- Tips for Mixed Calendar Schedules
- Workshop – Maintaining the Calendars

6. Creating a Primavera Project WBS

- Opening and Navigating the WBS Window
- Creating and Deleting a WBS Node
- WBS Node Separator
- Work Breakdown Structure Lower Pane Details
- WBS Categories
- Displaying the WBS in the Activity Window
- Why a Primavera WBS is Important
- Workshop – Creating the Work Breakdown Structure

7. Adding Activities and Organizing Under the WBS

- **New Activity Defaults**
 - Duration Type
 - Percent Complete Type
 - Activity Types and Milestones
 - Cost Account
 - Calendar
 - Auto-numbering Defaults
- **Adding New Activities**
- **Default Activity Duration**
- **Copying Activities from other Programs**
- **Copying Activities in P6**
- **Renumbering Activity IDs**
- **Elapsed Durations**
- **Finding the Bars in the Gantt Chart**
- **Activity Information – Bottom Layout**
- **Assigning Calendars to Activities**
 - Assigning a Calendar Using General Tab of the Bottom Layout Form
 - Assigning a Calendar Using a Column
- **Assigning Activities to a WBS Node**
- **Reordering or Sorting Activities**
- **Undo**
- **Summarizing Activities Using WBS**
- **Spell Check**
- **Workshop – Adding Activities**

8. Formatting the Display

- **Formatting the Project Window**
- **Understanding Forms**
- **Formatting the Bars**
 - Formatting Activity Bars
 - Formatting Bars Issues
 - Bar Style Tab
 - Bar Settings Tab
 - Bar Labels Tab
 - Bar Chart Options Form

- Progress Line Display on the Gantt Chart
- Formatting Columns
 - Selecting the Columns to be Displayed
 - Column Header Alignment
 - Adjusting the Width of Columns
 - Setting the Order of the Columns from Left to Right on the Screen
- Row Height and Show Icon
- Format Timescale
 - Moving and Rescaling the Timescale
 - Format Timescale Command
 - Nonwork Period Shading in Timescale
- Inserting Attachments – Text Boxes and Curtain
 - Adding and Deleting a Text Box
 - Adding and Deleting a Curtain
- Format Fonts and Font Colors
- Format Colors
- Line Numbers
- Workshop – Formatting the Bar Chart

9. Adding Relationships

- Constraints
- Understanding Relationships
- Understanding Lags and Leads
- Formatting the Relationships
- Adding and Removing Relationships
 - Graphically Adding and Deleting a Relationship
 - Graphically Deleting a Relationship
 - Adding and Deleting Relationships with the Activity Details Form
 - Adding and Deleting Relationships Using Columns
 - Chain Linking
 - Using the Assign Toolbar Icons to Assign Relationships
- Dissolving Activities
- Circular Relationships
- Scheduling the Project
- Reviewing Relationships, Leads and lags
- Workshop – Adding the Relationships

10. Activity Network View

- Viewing a Project Using the Activity Network View
- Adding and Deleting Activities
 - Adding an Activity
 - Deleting and Activity
- Adding, Editing and Deleting Relationships
 - Graphically Adding a Relationship
 - Using the Activity Details Form
- Formatting the Activity Boxes
- Reorganizing the Activity Network
- Saving and Opening Activity Network Positions
- Early Date, Late Date and Float Calculations
- Workshop – Scheduling Calculations and Activity Network View

11. Constraints

- Assigning Constraints
 - Number of Constraints per Activity
 - Setting a Primary Constraint Using the Activity Details Form
 - Setting a Secondary Constraint Using the Activity Details Form
 - Expected Finish Constraint
 - Setting Constraints Using Columns
 - Typing in a Start Date
- Project Must Finish By Date
- Activity Notebook
 - Creating Notebook Topics
 - Adding Notes
- Workshop – Constraints

Day 2 Modules

1. Group, Sort and Layouts

- Group and Sort Activities
 - Display Options
 - Group By
 - Group By Options
 - Sorting
 - Reorganize Automatically

- Auto-Reorganization
- Set Page Breaks in the Group and Sort Form
- Group and Sort Projects at Enterprise Level
- Understanding Layouts
 - Applying an Existing Layout
 - Creating a New Layout
 - Saving a Layout after Changes
 - Layout Types
 - Changing Activity Layout Types in Panes
 - Activities Window Layout Panes
 - WBS and Projects Window Panes
- Copying a Layout To and From Another Database
- Workshop – Organizing Your Data

2. Filters

- Understanding Filters
- Applying a Filter
 - Filters Form
 - Applying a Single Filter
 - Applying a Combination Filter
- Creating and Modifying a Filter
 - Creating a New Filter
 - One Parameter Filter
 - Two Parameter Filter
 - Multiple Parameter Filter
 - Editing and Organizing Filter Parameters
 - Understanding Resource Filters
- Workshop – Filters

3. Printing and Reports

- Printing
- Print Preview
- Page Setup

- Page Tab
- Margins Tab
- Header and Footer Tabs
- Options Tab

- Print Form
- Print Setup Form
- Reports
 - Running Reports
 - Editing Reports
 - Publish to a Web Site
- Timescaled Logic Diagrams
- Visualizer
- Workshop – Printing

4. Scheduling Options and Setting a Baseline

- Understanding Date Fields
 - Early Start and Early Finish
 - Late Start and Late Finish
 - Actual Start and Finish
 - Start and Finish
 - Planned Dates
 - Planned Dates Issues
 - Remaining Early Start and Finish
 - Remaining Late Start and Finish
- Scheduling Options – General Tab
 - Ignore relationships to and from other projects
 - Make open-ended activities critical
 - Use Expected Finish Dates
 - Schedule automatically when a change affects dates
 - Level resources during scheduling
 - Recalculate resource costs after scheduling
 - When scheduling progressed activities use
 - Calculate start-to-start lag from

- Define critical activities as
- Calculate float based on finish date
- Compute Total Float as
- Calendar for scheduling Relationship Lag
- Scheduling Options – Advanced Tab
- Setting the Baseline
 - Creating a Baseline
 - Deleting a Baseline
 - Restoring a Baseline to the Database as an Active Project
 - Update Baselines
 - Copying a Project with Baselines
 - Setting the Baseline Project
 - Understanding the <Current Project> Baseline
 - Displaying the Baseline Data
- Workshop – WBS, LOEs and Setting the Baseline

5. Updating an Unresourced Schedule

- Practical Methods of Recording Progress
- Understanding the Concepts
 - Activity Lifecycle
 - Assigning an Actual Start Date and Time of an Activity
 - Assigning an Actual Finish Date and Time of an Activity
 - Calculation of Durations of an In-Progress Activity
 - Summary Bars Progress Calculation
 - Understanding the Current Data Date
- Updating the Schedule
 - Updating Activities Using the Status Tab of the Details Form
 - Updating Activities Using Columns
- Progress Spotlight and Update Progress
 - Highlighting Activities for Updating by Dragging the Data Date
 - Spotighting Activities Using Spotlight Icon
 - Updating a Project Using Update Progress

- Suspend and Resume
- Scheduling the Project
- Comparing Progress with Baseline
- Progress Line Display on the Gantt Chart
- Corrective Action
- Check List for Updating a Schedule
- Workshop – Progressing and Baseline Comparison

6. User and Administration Preferences

- User Preferences
 - Time Units Tab
 - Dates Tab
 - Currency Tab
 - E-Mail Tab
 - Assistance Tab
 - Application Tab
 - Password Tab
 - Resource Analysis Tab
 - Calculations Tab
 - Startup Filters Tab
- Admin Menu
 - Users
 - Security Profiles
 - Currencies
 - Financial Periods
 - Timesheet Dates
- Admin Preferences
 - General Tab
 - Timesheets Tab
 - Data Limits Tab
 - ID Lengths Tab
 - Time Periods Tab
 - Earned Value Tab

- Reports Tab
- Options Tab
- Rate Types Tab
- Industry Tab
- Admin Categories


- Miscellaneous Defaults
 - Default Project
 - Set Language

7. Creating Roles and Resources

- Understanding Resources and Roles
 - Individual Resources
 - Group Resources
 - Input and Output Resources
 - Understanding Roles
- Creating Roles
- Creating Resources and the Resources Window
 - Resource Breakdown Structure – RBS
 - Formatting the Resources Window
 - Adding Resources
 - General Tab
 - Codes Tab
 - Details Tab
 - Units and Prices Tab
 - Roles Tab
 - Notes Tab
 - Progress Reporter Tab
 - Workshop – Adding Resources to the Database

8. Assigning Roles, Resources and Expenses

- Understanding Resource Calculations and Terminology
- Project Window Resource Preferences
 - Resources Tab
 - Understanding Resource Option to Drive Activity Dates
 - Calculations Tab
- User Preferences Applicable to Assigning Resources
 - Units/Time Format
 - Resource Assignments
 - Assignment Staffing

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- **Activities Window Resource Preferences and Defaults**
 - Details Status Form
 - Activity Type
 - Duration Type
 - **Assigning and Removing Roles**
 - **Assigning and Removing Resources**
 - Assigning a Resource to an Assigned Role
 - Assigning a Resource to an Activity Without a Role
 - Removing a Resource
 - Assigning a Resource to an Activity More Than Once
 - **Resource and Activity Duration Calculation and Resource Lags**
 - Activity Duration
 - Resource Lag
 - **Expenses**
 - Expenses Window
 - Expenses Tab in the Activities Window
 - **Suggested Setup for Creating a Resourced Schedule**
 - **Workshop – Assigning Resources and Expenses to Activities**