



**2-Day Oracle Primavera P6 Professional
Advanced Resource & Cost Management
- Training Outline -**



PREPARED BY:

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What You Will Learn

This instructor-led course provides students with hands-on training for Primavera P6 Professional. This course is designed to lead students through advanced resource and cost management topics which are not discussed during our fundamentals class. Guided by an instructor, students will learn to create resources, roles and resource codes, specify activity duration types, create and apply resource curves, specify resource lag and duration, perform bucket planning for resource assignments, conduct advanced resource and role analysis using resource filters and stacked histograms, leverage automated resource leveling tools to optimize resource demand, configure autocost rules for resource and cost tracking, store period performance using financial periods, perform earned value management and earned value analysis using CPI, SPI, ETC, EAC and TCPI, and utilize top-down estimation tools within Primavera P6 Professional.

Topics Include:

- Create Resources, Roles and Resource Codes
- Specify Resource Assignment Rate Types
- Leverage Activity Duration Types
- Create and Assign Resource Curves
- Specify Resource Assignment Lag and Duration
- Perform Bucket Planning
- Conduct Advanced Resource Analysis
- Resource Filters and Stacked Histograms
- Resource Leveling
- Autocost Rules
- Financial Periods and Storing Period Performance
- Earned Value Management
- Top-Down Estimation



Workshops

Each lesson includes hands-on workshops to reinforce key concepts

Use P6 Professional

The course uses P6 Professional, Primavera's Windows-based, client/server application. This course is appropriate for those using P6 Professional either as a stand-alone application or as part of P6 EPPM.

Continuing Education Units

Professional Development Units (PDU) and Continuing Education Units (CEU): Earns 16 PDUs and 1.6 CEUs.

Audience

- Scheduler
- Project Controls Specialist
- Project Manager
- Primavera End Users



Course Format

- The course duration is 2 days
- The is led by a live, U.S.-based instructor
- The course will be conducted live and online. **Travel is not required.**

Software Required

- PPM Global Services will host all Primavera P6 software required for this class.
- Students will access the Primavera software remotely via remote desktop connection
- Students do not need to own or install Primavera P6 to participate in this class.

Course Materials

- Each student will receive a copy of PPM Global Services, Inc.'s "**Primavera P6 Professional Advanced Resource & Cost Mgt.**" student guide in .PDF format.
- "**Primavera P6 Professional Advanced Resource & Cost Mgt**" contains lessons and instructions for each topic discussed during class and will serve as the student guide throughout course instruction.
- Upon completion of class, the student will retain ownership of the "**Primavera P6 Professional Advanced Resource & Cost Mgt**" student guide.

International Phone Numbers Provided

- International phone numbers provided for 18 countries.
- Alternatively, students can join using voice over IP (VOIP).



About PPM Global Services, Inc.

PPM Global Services is a provider of project portfolio management, contract management and scheduling solutions.

As an Oracle Gold Partner, PPM Global Services offers the strength of an authorized Oracle solution provider, while maintaining the agility of a small company with the ability to deliver. By providing a portfolio of talent and technology, we believe complex problems can be solved through elegant solutions.

PPM Global Services, Inc. has implemented Oracle Primavera P6 EPPM solutions on three continents. Our team of certified Primavera trainers and implementation specialists can help you to maximize the power of Primavera.

Register today to attend one of our upcoming Oracle Primavera P6 classes and unlock the power of Primavera.

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Primavera P6 Professional Advanced Resource & Cost Mgt. – Course Outline

Lesson 1 – Creating Resources, Roles, and Resource Codes

- Creating Resources
- Specifying Resource Limits and Availability
- Creating Roles
- Specifying Role Limits and Availability
- Creating Resource Codes
- ***Student Workshop***

Lesson 2 – Estimating Activity Resources and Costs

- Assign Roles to Activities
- Assign Resources to Activities
- Specify Rate Types and Rate Source for Resource Assignments
- Using Override Rates to Calculate Assignment Costs
- Creating Project Expenses
- Specifying Accrual Types for Project Expenses
- Assigning Cost Accounts to Resources and Expenses
- Assigning Categories to Expenses
- ***Student Workshop***

Lesson 3 – Understanding Duration Types

- Specifying User Preferences to Optimize Duration Types
- Selecting the Project Default Duration Type
- Selecting Activity Duration Types
 - Fixed Duration and Units
 - Fixed Duration & Units/Time
 - Fixed Units
 - Fixed Units/Time
- ***Student Workshop***

Lesson 4 – Resource Curves, Assignment Lag and Bucket Planning

- Assigning Resource Duration & Lag
- Understanding Linear vs. Non-Linear Distribution of Work
- Creating Resource Curves
- Assigning Resource Curves
- Perform Bucket Planning for Resource Assignments
- Understanding the relationship between Duration Types, Resource Curves, and Bucket Planning
- ***Student Workshop***

Lesson 5 – Advanced Resource & Role Analysis

- Resource and Role
- Using Resource Histograms
- Enabling Stacked Histograms
- Creating Resource Filters for Stacked Histograms
- Viewing Demand for multiple resources within the Resource Usage Profile
- Analyzing resource demand for Open vs. All Projects
- Creating Summary Data for Resource Analysis
- Displaying Limits & Overallocation in the Resource Usage Spreadsheet
- Configuring Columns, Grouping and Sorting in the Resource Assignments Window
- Calculating Period Averages in the Resource Assignments Window
- ***Student Workshop***

Lesson 6 – Levelling Resources

- Understanding Resource Leveling
- Determining Resource Overallocation
- Specifying Project Leveling Priorities
- Configuring Activity Leveling Priorities
- Specifying Resources for Resource Leveling
- Using Activity Codes to Level Resources
- Accepting and Rejecting Leveling Results
- ***Student Workshop***

Lesson 7 – Autocost Rules for Resource Assignments & Expenses

- Linking Budget and At Completion for Not Started Activities
- Updating Units when Costs Change on Resource Assignments
- Specifying Rules for Adding / Subtracting Actual and Remaining Costs
- Recalculate Actual Units & Costs when Duration % Complete Changes
- Automatically vs. Manually calculating assignment costs during scheduling
- Using Auto Compute Actuals to Apply Actuals for
 - Activities
 - Resource Assignments
 - Expenses
- ***Student Workshop***

Lesson 8 – Financial Periods and Storing Period Performance

- Creating Financial Periods
- Displaying Financial periods in Columns
- Storing Period Performance
- Linking Actual to Date and Actual this Period Units and Costs
- Editing Past Period Actuals
- Viewing Fiscal Period Data in Time-Phased Spreadsheets
- ***Student Workshop***

Lesson 9 – Earned Value Management

- Establishing Budget at Completion (BAC)
- Selecting the Baseline for Earned Value Calculations
- Calculating Planned Value
- Calculating Actual Cost of Work Performed
- Calculating Earned Value
- Understanding Performance % Complete
- Specifying Technique for Computing Performance % Complete
- Calculating Cost Performance Index (CPI)
- Calculating Schedule Performance Index (SPI)
- Specifying the Method to compute Estimate to Complete (ETC)
- Calculating Estimate at Completion (EAC)
- Calculating To Complete Performance Index (TCPI)
- Viewing Time-Phased Earned Value Data
- ***Student Workshop***

Lesson 10 – Top Down Estimation

- Estimating WBS Weights
- Estimating Activity Weights
- Configure Top Down Estimation Settings
- Perform Top Down Estimation for a Specified WBS
- Perform Top Down Estimation for a Specified Resource
- Perform Top Down Estimation for the Project
- Saving and Applying Top Down Estimates
- Applying an Adjustment to a Top Down Estimate
- ***Student Workshop***