



**3-Day Oracle Primavera P6 Professional  
Fundamentals  
- Training Outline -**



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## What You Will Learn

This Primavera P6 Professional training leads you through the entire project life cycle, from planning to execution. You'll develop a thorough understanding of how to plan and schedule.

### **Learn To:**

- Create and schedule a project
- Assign resources.
- Adjust the project schedule.
- Execute and control the project.
- Add activities.



### **Benefits to You**

Enrolling in this course will help you understand P6 Professional's basic features and functionalities so you can apply them to your organization's project management processes. You'll also learn how to manage projects on time and within budget to ensure optimal outcomes from capital and resource investments.

### **Explore Project Management Fundamentals**

All workshops and instruction stress the three basic elements of project management: schedule, resources and costs.

### **Use P6 Professional**

Students will apply the concepts and functionality learned during class exercises. The course is organized into 21 lessons.

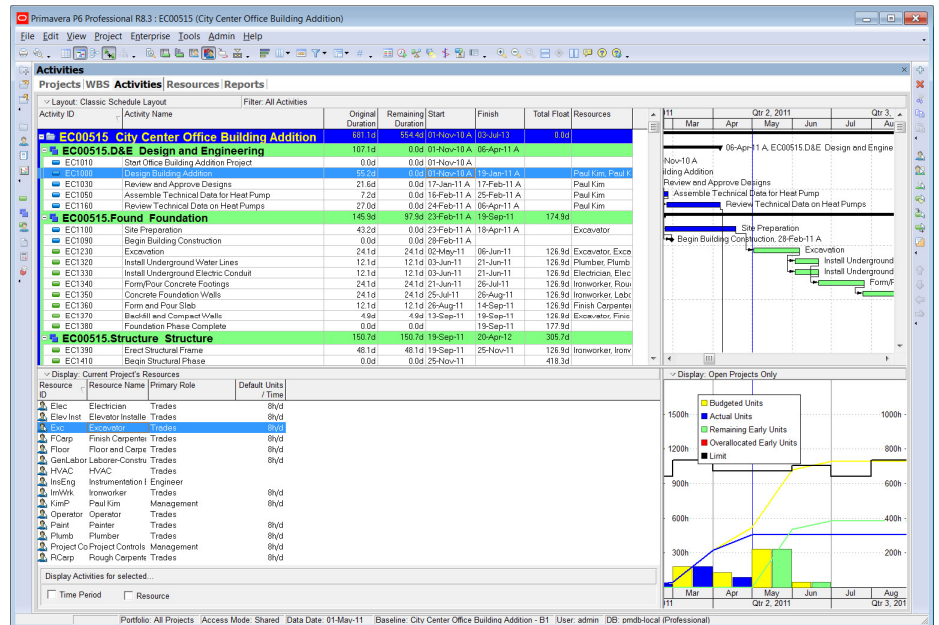
The course uses P6 Professional, Primavera's Windows-based, client/server application. It is appropriate for those using P6 Professional either as a stand-alone application or as part of P6 EPPM.

### **Continuing Education Units**

Professional Development and Continuing Education Units: Earns 19.5 PDUs and 1.95 CEUs. Please note that this course uses the P6 Optional Client (Windows-based client).

## Course Objectives

- Create a project
- Create a Work Breakdown Structure
- Add activities
- View calendars
- Create relationships
- Schedule the project
- Assign constraints
- Format schedule data
- Define roles and resources
- Assign roles
- Assign resources
- Analyze resources
- Optimize the project plan
- Execute the project
- Create reports
- Understand data structures



## Audience

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

## Course Format

- The course duration is 3 days
- The course will be led by a live 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 Fundamentals**" student guide in .PDF format.
- "**Primavera P6 Professional Fundamentals**" 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 Fundamentals**" 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 Fundamentals – Course Outline

### **Lesson 1 – Primavera Overview & Navigation**

- Primavera EPPM Environment
- Enterprise vs. Project-Specific Data
- Logging into Primavera
- Establishing User Preferences
- Navigating within Primavera P6 Professional

### **Lesson 2 – Creating a Project**

- What is a Project
- Creating a Project Using the Project Wizard
- Establishing Project Settings



### **Lesson 3 – Developing the Work Breakdown Structure**

- Adding WBS Elements
- Copying WBS Elements
- Moving WBS Elements
- Creating Child WBS Elements
- Deleting WBS Elements
- Sorting the WBS Hierarchy
- ***Student Workshop***

### **Lesson 4 – Creating Calendars**

- Creating Project Calendars
- Linking Holidays to a Project Calendar
- Defining the Standard Workweek
- Defining Calendar Time Periods
- Establishing Non-Work Time
- Establishing Exceptions to Non-Worktime
- Viewing Detailed Work Hours/Day
- ***Student Workshop***

### **Lesson 5 – Adding Activities**

- Adding Start and Finish Milestones
- Adding Task Dependent Activities
- Adding Level of Effort Activities
- Adding Steps to an Activity
- Recording Activity Notebook Topics
- ***Student Workshop***

### **Lesson 6 – Creating & Assigning Activity Codes**

- Global Activity Codes
- EPS Activity Codes
- Project Activity Codes
- Creating Activity Codes & Values
- Adding an Activity Code Value during Assignment
- Assigning Activity Code Values using Activity Details
- Assigning Activity Code Values using Columns
- ***Student Workshop***

### **Lesson 7 – Creating Activity Relationships**

- What are Activity Relationships?
- Network Logic Diagram
- Precedence Diagramming Method (PDM)
- Relationship Types
- Relationship Lag
- Creating Activity Relationships
- Viewing Relationships in the Gantt Chart
- Viewing Relationships in the Activity Network
- ***Student Workshop***

### **Lesson 8 – Calculating the Project Schedule**

- Critical Path Method
- What is the Critical Path Method
- What is the Critical Path
- Understanding the Data Date
- Schedule Calculations
- Forward Pass
- Backward Pass
- Total Float
- Free Float
- Open Ends
- Circular Relationships (Loops)
- Scheduling the Project
- Viewing the Schedule Log
- Reviewing the Scheduled Activities
- ***Student Workshop***

### **Lesson 9 – Critical Path & Float Analysis**

- Critical Path Methodology
- Understanding the Critical Path
- Critical Activities
- Float Analysis
- Establishing Settings for Total Float Calculations
- Defining Critical Activities in Primavera
- Viewing Critical Activities

### **Lesson 10 – Assigning Schedule Constraints**

- Project Constraints
- Activity Constraints
- Understanding the Impact of Schedule Constraints
- Applying a Must Finish By Constraint to the Project
- Applying Activity Constraints
- Documenting a Schedule Constraint using Notebook Topics
- ***Student Workshop***

### **Lesson 11 – Creating Activity Layouts**

- Global Layouts
- Project Layouts
- User Layouts
- Customizing Columns
- Grouping Data
- Sorting Data
- Filtering Data
- Creating a Filter
- Customizing Activity Details
- Customizing the Gantt Chart
- Customizing the Timescale
- Customizing Bar Labels
- Saving a User Layout
- ***Student Workshop***

### **Lesson 12 – Understanding Resources & Roles**

- What is a Resource?
- Resource Breakdown Structure
- Labor Resources
- Non-Labor Resources
- Material Resources
- Understanding Resource Details
- What is a Role?
- Viewing the Roles Dictionary
- Calculating Role Limits
- ***Student Workshop***

### **Lesson 13 – Assigning Resources & Roles**

- Estimating Activity Resources
- Creating a Layout for Assigning Resources & Roles
- Assigning Roles to Activities
- Assigning Resources to Activities
- Adding Expenses to an Activity
- Viewing Project Costs
- ***Student Workshop***

### **Lesson 14 – Analyzing Resource Demand**

- Understanding Resource & Role Demand
- Resource Analysis Tools
- Analyzing Resource Demand
- Creating a Layout for Resource Analysis
- Resource Usage Profile (Histogram)
- Identifying Activities Contributing to Over Allocation
- Displaying the Resource Usage Spreadsheet
- Resource Assignments Window

### **Lesson 15 – Leveling Resource Demand**

- What is Resource Leveling?
- Identifying Sources of Resource Overallocation
- Resolving Resource Overallocation
- Using Schedule Constraints to Level Resource Demand
- Replacing Resources to Level Resource Demand
- ***Student Workshop***



### **Lesson 16 – Creating the Project Baseline**

- Creating a Baseline
- Assigning the Project Baseline
- Viewing Baseline Data
- Viewing Baseline Bars in the Gantt Chart
- Viewing Baseline Columns in the Activity Table
- Saving a Baseline Layout

### **Lesson 17 – Tracking Schedule Progress**

- Work Performance Data
- Planned vs. Actual
- Data Date
- Define the Update Period
- Creating a Project Statusing Layout
- Using the Progress Spotlight
- Statusing a Schedule Milestone
- Statusing a Tasks
- Statusing Resource Assignment Data
- Rescheduling the Project with the New Data Date
- ***Student Workshop***

### **Lesson 18 – Analyzing Schedule Variances**

- Variance Analysis
- Project Baseline vs. Current Schedule
- Identifying Schedule Variances using Tabular Data
- Identifying Schedule Variances using the Gantt Chart
- Examine Variance Data in the Gantt Chart
- Implementing Corrective Action
- Schedule Compression
- Crashing
- Fast Tracking

### **Lesson 19 – Working with Reflections**

- What is a Reflection?
- Benefits of Reflections
- Creating a Project Reflection
- Revising the Reflection Project
- Merging Changes from the Reflection Project to the Source Project
- ***Student Workshop***

### **Lesson 20 – Printing Layouts & Reports**

- Work Performance Reports
- Printing Primavera Layouts
- Configuring Printed Layout Options
- Producing Tabular Reports
- Running an Existing Report
- Creating a New Tabular Report
- ***Student Workshop***

### **Lesson 21 – Importing & Exporting Data**

- Understanding Supported File Formats
- Importing / Exporting .XML File Format
- Importing / Exporting .XER File Format
- Importing / Exporting .XLS File Format
- Importing / Exporting Activity Layouts