

# Primavera P6 Fundamentals Rel 19 Ed 1

Construction and engineering

DURATION

**3 Days**

MODULES

**23 Lectures**

COURSE CODE

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## Course Overview

This course provides a comprehensive introduction to Primavera P6 Fundamentals. Learn the essential concepts, features, and best practices needed to work effectively with Construction and engineering solutions.

## What You Will Learn

### Module 1: Project Management Life Cycle

- Lesson 1: Project Management Life Cycle
- Project Management Definitions
- Project Management Life Cycle
- Initiating Process Group
- Planning Process Group
- Executing Process Group
- Controlling Process Group
- Closing Process Group
- Lesson Review

### Module 2: Understanding Data in P6

- Lesson 2: Understanding Data in P6
- P6 EPPM
- P6
- Team Member Interfaces
- Other Applications
- Enterprise Project Structure (EPS)
- EPS Overview
- Sample EPS
- Benefits of the EPS
- Organizational Breakdown Structure (OBS)
- Sample OBS

- Enterprise Data and Project-Specific Data
- Enterprise Data
- Project-Specific Data
- Lesson Review

## Module 3: Overview and Navigation

- Lesson 3: Overview and Navigation
- Navigating P6
- P6 Sections
- P6 Pages
- Logging In
- Using the P6 Title Bar and P6 Help
- Using the P6 Navigation Bar
- Opening a Project via Dialog Box
- Opening a Project on the EPS Page
- Context Menu
- Navigating the Projects Section
- Projects Navigation Bar
- Viewing the Activities Page and Selecting an Activity View
- Activity Table
- Gantt Chart
- Activity Detail Windows
- WBS Detail Windows
- Lesson Review

## Module 4: Creating a Project

- Lesson 4: Creating a Project
- Project Overview
- Creating a Project
- Creating a New Project
- Creating a Project from a Template
- Editing Project Details
- General Detail Window
- Notebook Detail Window
- Lesson Review

## Module 5: Work Breakdown Structure (WBS)

- Lesson 5: Creating a WBS
- WBS Overview
- Adding a Child WBS Element
- Specifying a WBS Code
- Adding a Sibling WBS Element
- Adding a WBS Using Keyboard Shortcuts
- Cutting and Pasting a WBS Element

- Lesson Review

## Module 6: Adding Activities

- Lesson 6: Adding Activities
- Activities Overview
- Activity Components and Types
- Start Milestone
- Finish Milestone
- Task Dependent
- Resource Dependent
- Level of Effort
- WBS Summary
- Activity Codes
- Adding Activity Code Values
- Adding Activities
- Start Milestones
- Copying and Pasting Activities
- Deleting Activities
- Importing Spreadsheets to Add Activities
- Editing Activity Details
- Using Steps
- Using Notebooks
- Using Activity Codes
- Lesson Review

## Module 7: Calendars

- Lesson 7: Calendars
- Calendars Overview
- Available Calendars
- Resource Calendars
- Work Time Types
- Calendars and Activity Types
- Viewing Calendars
- Global Calendar
- Editing Project Calendar
- Setting Exceptions and Nonwork Exceptions
- Assigning a Calendar to an Activity
- Lesson Review

## Module 8: Case Study - Creating a Project

- Lesson 8: Case Study 1 - Creating a Project

## Module 9: Creating Relationships

- Lesson 9: Creating Relationships

- Network Logic Diagram
- Precedence Diagramming Method (PDM)
- Relationship Types: FS, SS, FF, SF
- Relationships with Lag
- Creating Relationships with Lag
- Lesson Review

## Module 10: Scheduling

- Lesson 10: Scheduling
- Critical Path Method Scheduling
- Critical Path
- Data Date
- Forward Pass
- Backward Pass
- Total Float
- Types of Total Float
- Must Finish By Date
- Backward Pass with Required Finish
- Circular Relationships (Loops)
- Open Ends
- Scheduling Overview
- Scheduling a Project
- Using Schedule Check Report
- Viewing Scheduled Finish Date
- Lesson Review

## Module 11: Assigning Constraints

- Lesson 11: Assigning Constraints
- Constraints Overview
- Must Finish By
- Start On or After
- Additional Start/Finish Constraints
- How Constraints Affect Activity Dates
- Project-Level Constraints
- Activity-Level Constraints
- Viewing Total Float
- Lesson Review

## Module 12: Customizing Activity Views

- Lesson 12: Customizing Activity Views
- Activity Views Overview
- Grouping, Sorting, Filtering
- Displaying Project Data
- Saving a Copy of an Activity View

- Configuring Columns, Sorting, Grouping, Filtering, Bars, and Gantt Tabs
- Viewing Gantt Chart and Timescale
- Quick Methods to Arrange Columns and Sort Data
- Lesson Review

## Module 13: Roles and Resources

- Lesson 13: Understanding Roles and Resources
- Roles and Resources Overview
- Resource Details
- Relationship Between Roles and Resources
- Resource Types
- Viewing Roles and Resources
- Units and Price Information
- Resource Teams
- Roles and Role Teams
- Lesson Review

## Module 14: Assigning Roles and Resources

- Lesson 14: Assigning Roles and Resources
- Assigning Roles
- Assigning Resources
- Steps for Resource Management
- Summarization
- Assigning Roles and Resources Overview
- Viewing Assignments Detail Window
- Assigning Resources to Activities
- Assigning Roles to Activities
- Filling Unstaffed Role Assignments
- Designating a Primary Resource
- Lesson Review

## Module 15: Case Study - Scheduling and Resource Assignment

- Lesson 15: Case Study 2 - Scheduling and Assigning Resources

## Module 16: Optimizing the Project Plan

- Lesson 16: Optimizing the Project Plan
- Project Constraints
- Optimizing the Project Plan
- Analyzing Schedule Dates and Resource Allocation
- Analyzing Budget
- Importing and Exporting Projects
- Shortening the Schedule
- Focusing on Critical Activities
- Refining Activity Durations

- Modifying Relationships and Constraints
- Summarizing Resource Allocation
- Assigning Replacement Resources
- Reviewing Budget
- Lesson Review

## Module 17: Baselineing the Project Plan

- Lesson 17: Baselineing the Project Plan
- What is a Baseline?
- Baseline Types
- Creating and Assigning Baselines
- Displaying Baseline Bars
- Converting Project to Baseline
- Restoring Baselines
- Lesson Review

## Module 18: Methods of Applying Progress

- Lesson 18: Methods of Applying Progress
- Preparing Project for Updating
- Scheduling Initial Project Plan
- Data Date, Critical Path
- Creating and Maintaining Baselines
- Updating Project
- Selecting Updating Method
- Auto Compute Actuals
- Linking Percent Complete with Actuals
- Manually Updating Activities, Expenses, and Resources
- Timesheets / Team Member Interfaces
- Delegating Status Updates
- Project Scheduled Services
- Lesson Review

## Module 19: Executing the Project Plan

- Lesson 19: Executing the Project Plan
- Updating a Project
- Data Date
- Updating Process Overview
- Using Progress Spotlight
- Updating via Team Member Interfaces

Updating Start Milestones, Completed Activities, Remaining Duration, Actual Units

- Suspending Activities
- Rescheduling the Project
- Assessing Rescheduled Project
- Lesson Review

## Module 20: Analyzing the Updated Project

- Lesson 20: Analyzing the Updated Project
- Steps for Analyzing Updated Project
- Questions to Adjust Schedule
- Shortening the Project
- Analyzing Schedule Dates and Critical Activities
- Comparing Current and Baseline Dates
- Reducing Lag on Activities
- Lesson Review

## Module 21: Portfolios and Dashboards

- Lesson 21: Portfolios and Dashboards
- Dashboards Overview
- Portfolios Overview
- Ways to Create Portfolios
- Filtering Portlet Data
- Displaying and Modifying Portlets
- Viewing Project Health and Gantt Chart Portlets
- Creating and Managing Dashboards
- Creating Portfolios
- Manually
- By Filter
- Creating, Displaying, and Deleting Portfolio Views
- Lesson Review

## Module 22: Case Study - Project Execution and Control

- Lesson 22: Case Study 3 - Project Execution and Control

## Module 23: Updating the Project Using Timesheets

- Lesson 23: Updating the Project Using Timesheets
- Updating a Project
- Timesheet Approval Process
- Data Date
- Applying Actuals
- Viewing Timesheets and Notes
- Approving Timesheets
- Rescheduling the Project
- Lesson Review
- Appendices
- Appendix A: Reporting
- P6 Reporting Process
- Oracle Business Intelligence Publisher
- Primavera Analytics and Oracle Business Intelligence
- Reporting Overview

- Using Reports View
- Configuring Report Delivery Settings
- Scheduling and Viewing Reports
- Appendix B: Case Study Solutions