# Primavera P6 Fundamentals Rel 21 Ed 1

Construction and engineering

| DURATION | MODULES | COURSE CODE |
| --- | --- | --- |
| 3 Days | 23 Lectures | — |

## Course Overview

Learn to create a project, add activities and relationships, schedule, assign resources, and then update the project.

## What You Will Learn

### Module 1: Project Management Fundamentals

- 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 and P6 Overview
- 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 vs. Project-Specific Data
- Lesson Review

## Module 3: P6 Overview and Navigation

- Lesson 3: Overview and Navigation
- Navigating P6
- P6 Sections and Pages
- Logging In
- Using the Title Bar, Help, and Navigation Bar
- Opening Projects (Dialog Box and EPS Page)
- Context Menu
- Navigating the Projects Section
- Activities Page
- Activity Table
- Gantt Chart
- Activity Detail Windows
- WBS Detail Windows
- Lesson Review

## Module 4: Creating and Managing Projects

- Lesson 4: Creating a Project
- Project Overview
- 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 Work Breakdown Structure
- WBS Overview
- Creating a WBS
- Adding Child and Sibling WBS Elements
- Specifying WBS Codes
- Keyboard Shortcuts
- Cutting and Pasting WBS Elements
- Lesson Review

## Module 6: Activities and Activity Details

- Lesson 6: Adding Activities
- Activities Overview
- Activity Components and Types
- Start / Finish Milestones
- Task Dependent
- Resource Dependent

- Level of Effort
- WBS Summary
- How Activity Type Affects Dates
- Activity Codes
- Adding, Copying, Deleting Activities
- Importing Activities from Spreadsheets
- Editing Activity Details
- Steps
- Notebooks
- Activity Codes and Values
- Lesson Review

## Module 7: Calendars

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

## Module 8: Case Study – Project Creation

- Lesson 8: Case Study 1 – Creating a Project

## Module 9: Relationships and Network Logic

- Lesson 9: Creating Relationships
- Network Logic Diagram
- Precedence Diagramming Method (PDM)
- Relationship Types
- Finish-to-Start (FS)
- Start-to-Start (SS)
- Finish-to-Finish (FF)
- Start-to-Finish (SF)
- Relationships with Lag
- Creating Relationships and Lag
- Lesson Review

## Module 10: Project Scheduling

- Lesson 10: Scheduling
- Critical Path Method (CPM)

- Critical Path
- Data Date
- Forward and Backward Pass
- Total Float and Float Types
- Must Finish By Date
- Circular Relationships and Open Ends
- Scheduling a Project
- Schedule Check Report
- Viewing Scheduled Finish Dates
- Lesson Review

## Module 11: Constraints Management

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

## Module 12: Customizing Activity Views

- Lesson 12: Customizing Activity Views
- Activity Views
- Grouping, Sorting, and Filtering
- Saving Activity Views
- Configuring Tabs
- Columns
- Sorting
- Grouping
- Filtering
- Bars
- Gantt
- Adjusting Gantt Chart Timescale
- Quick Layout Techniques
- Lesson Review

## Module 13: Roles and Resources

- Lesson 13: Understanding Roles and Resources
- Roles vs. Resources
- Resource Details
- Relationship Between Roles and Resources

- Resource Types
- Viewing Resources and Units
- Resource Teams
- Viewing Roles and Role Teams
- Lesson Review

## Module 14: Assigning Roles and Resources

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

## Module 15: Case Study – Scheduling and Resources

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

## Module 16: Optimizing the Project Plan

- Lesson 16: Optimizing the Project Plan
- Project Constraints
- Schedule Optimization
- Analyzing Schedule Dates
- Shortening the Project
- Analyzing Resource Allocation
- Budget Analysis
- Importing and Exporting Projects
- Replacing Resources
- Lesson Review

## Module 17: Baselining

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

## Module 18: Applying Progress

- Lesson 18: Methods of Applying Progress

- Preparing the Project for Updating
- Data Date and Critical Path
- Updating Methods
- Auto Compute Actuals
- Linking Percent Complete with Actuals
- Manual Updates
- Timesheets and Delegated Updates
- Scheduled Services
- Lesson Review

## Module 19: Executing the Project Plan

- Lesson 19: Executing the Project Plan
- Updating the Project
- Using Progress Spotlight
- Updating Milestones and Activities
- Entering Actuals
- Handling Behind-Schedule Activities
- Suspending Activities
- Rescheduling and Assessment
- Lesson Review

## Module 20: Analyzing the Updated Project

- Lesson 20: Analyzing the Updated Project
- Analysis Steps
- Adjusting the Schedule
- Comparing Current vs. Baseline Dates
- Reducing Lag
- Lesson Review

## Module 21: Portfolios and Dashboards

- Lesson 21: Portfolios and Dashboards
- Dashboards Overview
- Portfolios Overview
- Creating and Managing Dashboards
- Viewing Project Health and Gantt Portlets
- Creating and Managing Portfolios
- Portfolio Views
- Lesson Review

## Module 22: Case Study – Execution and Control

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

## Module 23: Updating Projects Using Timesheets

- Lesson 23: Updating the Project Using Timesheets
- Timesheet Approval Process
- Applying Actuals
- Rescheduling the Project
- Lesson Review
- Appendices
- Appendix A: Reporting
- P6 Reporting Process
- Oracle BI Publisher
- Primavera Analytics
- Scheduling and Viewing Reports
- Appendix B: Case Study Solutions