Primavera P6 Fundamentals

Milestone
Project Management Solutions

What you will learn

This Primavera P6 Fundamentals training teaches you how to create a project, add activities and relationships, assign resources, adjust the project plan to account for schedule delays and over allocated resources and analyse portfolios.

Duration: Three Days

ORACLE APPROVED EDUCATION CENTER

Course Objectives

- Create a Project
- Create a work Breakdown Structure
- Add Activities
- Customize Activity Views
- Create Relationships

- Schedule the Project
- Assign Constraints
- View the Enterprise Project Structure
- Optimize the project schedule

- Assign roles and resources
- Analyse resources and costs
- Baseline the project plan
- Execute the project
- Customize dashboards

Suggested Prerequisites
Fundamental Project Management Knowledge
Knowledge of Windows

Target Audience
Project Manager, End Users , Functional Implementers, Business Analysts

Trainer Profile
Our trainers are accredited by Oracle University and are experienced planners, resource and project managers with experience of implementing project management systems

Professional Development
Delegate can qualify for Personal Development Units by requesting approval from the appropriate awarding bodies

FIND OUT MORE
Contact one of our expert advisors today for more information or a product demo

UK Office
+44 (0)20 8326 5760
info@milestoneuk.com
www.milestoneuk.com

South Africa Office
+27 (0)11-655-7117
info@milestonesa.co.za
www.milestonesa.co.za

Course Topics

Project Management Life Cycle
- Project Management Definitions
- Initiating Process Group
- Planning Process Group
- Executing Process Group
- Controlling Process Group
- Closing Process Group

Understanding Data in P6
- P6 EPPM
- P6
- Team Member Interfaces
- Other Applications
- Enterprise Project Structure (EPS)
- Sample EPS
- Benefits of the EPS
- Organizational Breakdown Structure (OBS)
- Sample OBS
- EPS and Security
- Enterprise Data and Project-Specific Data
- Enterprise Data
- Project-Specific Data

Overview and Navigation
- Navigating P6
- P6 Sections
- P6 Pages
- Logging In
- Using the P6 Title Bar and P6 Help
- Setting My Preferences
- Using P6 Help
- Using the P6 Navigation Bar
- Opening a Project via the Dialog Box
- Opening from the Open Projects Dialog Box
- Using the EPS to Locate Projects
- Searching for Projects
- Opening a Project on the EPS Page
- Opening Multiple and Dependent Projects
- Navigating the Projects Section
- Projects Navigation Bar
- Viewing the Activities Page and Selecting an Activity View
- Customizing the Activities Toolbar
- Activity Table
- Gantt Chart
- Activity Network
- Customizing the Activity Network
- Calendar View
- Activity Detail Windows
- WBS Detail Windows

Creating a Project
- Required Information for Creating a Project
- Creating a New Project

(Creating a Project continued)
- Creating a New Project from a Template
- Editing Project Details
- General Detail Window
- Budget Log Detail Window
- Notebook Detail Window
- Codes Detail Window

Creating a Work Breakdown Structure
- WBS
- Adding a Child WBS Element
- Specifying a WBS Code and a Responsible Manager
- Adding a Sibling WBS Element
- Adding a WBS Element Using a Keyboard Shortcut
- Creating Additional WBS Levels
- Cutting and Pasting a WBS Element

Adding Activities
- Activity Components
- Activity Type
- Start Milestone
- Finish Milestone
- Task Dependent
- Resource Dependent
- How Activity Type Affects Dates
- Question
- Level of Effort
- WBS Summary
- Activity Codes
- Adding a Start Milestone
- Adding Activities
- Copying and Pasting Activities
- Deleting Activities
- Importing Spreadsheets to Add Activities
- Editing Activity Details
- Using Steps
- Using Notebooks
- Using Activity Codes
- Adding Activity Code Values

Calendars
- Available Calendars
- Resource Calendars
- Work Time Types
- Calendars and Activity Types
- Viewing an Activity's Calendar
- Viewing Available Global Calendars
- Viewing a Global Calendar
- Editing a Project Calendar
- Setting Exceptions
- Setting Nonwork Exceptions
- Assigning a Calendar to an Activity

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
- Finish to Start with Lag
- Start to Start with Lag
- Question
- Creating Relationships in Detail Windows
- Creating Relationships with Lag
- Using the Relationships Detail Window
- Creating Relationships in the Gantt Chart
- Editing Relationships in the Gantt Chart
- Linking Multiple Activities
- Canceling Data Changes

Scheduling
- Critical Path Method Scheduling
- Critical PathData 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
- Questions
- Scheduling a Project
- Viewing the Schedule Log
- Using Schedule Check Report
- Viewing the Scheduled Finish Date

Assigning Constraints
- Constraints
- Must Finish By
- Start On or After
- Additional Start Constraints
- Additional Finish Constraints
- Additional Constraints
- How Constraints Affect Activity Dates
- Adding a Project-Level Constraint
- Viewing Total Float
- Adding an Activity-Level Constraint

Customizing Activity Views
- Activity Views
- Grouping
- SortingFiltering
- Saving a Copy of an Activity View
- Viewing the Customize Activity View Dialog Box
- Columns Tab
- Sorting Tab
- Grouping Tab
- Filters Tab
- Modifying Filter Access
- Bars Tab
- Gantt Chart and Access Tab

- Viewing the Gantt Chart and Changing the Timescale
- Renaming Columns
- Sorting Data and Ordering Columns on the Activities Page
- Selecting Detail Windows
- Relocating Detail Windows

Understanding Roles and Resources
- Resource Details
- Relationship Between Roles and Resources
- Resource Types
- Viewing Unit and Price Information
- Viewing Resource Teams
- Viewing Price and Limits Information for Roles
- Viewing Role Teams

Assigning Roles and Resources
- Steps for Resource Management
- Summarization
- Viewing the Assignments Detail Window
- Assigning Resources to an Activity
- Assigning a Role to an Activity
- Filling an Unstaffed Role Assignment
- Assigning a Role to Multiple Activities
- Assigning a Resource to Multiple Activities
- Designating a Primary Resource
- E-mail Notification

Project Workspace
- Security Access
- Accessing Project Workspace Customization Options
- Customizing Project Workspace Content
- Customizing Project Workspace Layout
- Using Portlet Controls
- Customizing Portlets

Optimizing the Project Plan
- Project Constraints
- Analyzing Schedule Dates
- Shortening the Project
- Analyzing Resource Allocation and the Budget
- Importing and Exporting Projects
- Summary Data
- Shortening the Schedule
- Comparing Scheduled Finish to Must Finish By Date
- Focusing on Critical Activities
- Refining Activity Durations
- Modifying Relationships
- Modifying Constraints
- Confirming Results
- Summarizing the Project
- Analyzing Resource Allocation on Team Usage Page
- Using the Check Resource Overallocation Service
- Using Overallocation Report to Resolve Resource Usage
- Reviewing the Budget
- Importing and Exporting Projects

Baselining the Project Plan
- What is a Baseline?
- Baseline Types
- Opening a Project Exclusively
- Creating Baselines
- Assigning Baselines
- Displaying Baseline Bars
- Converting a Project to a Baseline
- Restoring Baselines

Methods of Applying Progress
- Preparing the Project for Updating
- Scheduling the Initial Project Plan
- Data Date
- Critical Path
- Creating Baselines
- Maintaining Baselines
- Updating a Project
- Factors in Selecting an Updating Method
- Spectrum of Updating Methods
- Auto Compute Actuals
- Using Auto Compute Actuals
- Link Percent Complete With Actuals
- Using Link Percent Complete With Actuals
- Manually Update Activities, Expenses, and Resources
- Options for Manually Updating
- Timesheets/Team Member Interfaces
- Delegating Status Updates
- Project Scheduled Services

Executing the Project Plan
- Updating a Project
- Data Date
- The Updating Process
- Using Progress Spotlight
- Updating a Start Milestone
- Statusing an Activity to Completion
- Entering Actual Labor Units
- Updating Actual Start and Actual Finish Dates
- Updating a Completed Activity
- Updating a Completed Activity that is Behind Schedule

- Updating Remaining Duration for an Activity in Progress
- Updating Actual Units for an Activity in Progress
- Updating an Activity in Progress that is Behind Schedule
- Suspending an Activity
- Rescheduling the Project
- Assessing the Rescheduled Project
- Updating Status via Team Member Interfaces
- Reviewing Status Updates from Team Member Interfaces
- Viewing the Update History Detail Window

Analyzing the Updated Project
- Steps for Analyzing the Updated Project
- Questions to Determine How to Adjust a Schedule
- Shortening the Project
- Analyzing Schedule Dates and Critical Activities
- Comparing Current and Baseline Dates
- Shortening the Schedule
- Reducing Lag on an Activity
- Viewing Updated Project Information

Portfolios and Dashboards
- Comparing Dashboards and Project Workspace
- Ways to Create Portfolios
- Filtering Portlet Data
- Displaying a Portlet
- Modifying Portlet Layout
- Displaying a Custom Portlet
- Viewing the Project Health Portlet
- Viewing the Project Gantt Chart Portlet
- Creating a Dashboard
- Managing Dashboards
- Viewing Portfolios
- Creating a Portfolio Manually
- Creating a Portfolio by Filter
- Viewing a Dashboard via Filtered Portfolio
- Creating a New Portfolio View
- Display an Existing Portfolio View
- Deleting a Portfolio

This course uses P6, Primavera Web-based project management tool. Oracle BI and BPM are not covered in this course.

PLEASE NOTE: All courses are delivered using standard Oracle University materials - Industry specific offerings/examples are not included in standard materials.

Follow on Courses
- Primavera P6 Advanced
- Managing Risk in Primavera Risk Analysis (Pertmaster)
- Primavera P6 Reporting with BI Publisher 11g

RELATED PRODUCTS		RELATED SERVICES
▶ Primavera Risk Analysis	▶ Primavera P6 Team Member	▶ Application Consultancy
▶ Primavera P6 Analytics	▶ Primavera Gateway	▶ Integration Consultancy
▶ Primavera Web Services	▶ Primavera Unifier	▶ Health Checks

FIND OUT MORE
Contact one of our expert advisors today for more information or a product demo

UK Office
+44 (0)20 8326 5760
info@milestoneuk.com
www.milestoneuk.com

South Africa Office
+27 (0)11-655-7117
info@milestonesa.co.za
www.milestonesa.co.za