

# PROMASTAR Instructor-led Professional Training Services

## Primavera Accredited/Certified Class Courses



**Specialized**  
Primavera P6 Enterprise  
Project Portfolio Management



## **Oracle Primavera Learning Experience**

Learning in an organization is not an option—it's a requirement for success. The Oracle Primavera products optimize the value of knowledge and knowledge sharing within an enterprise, and their value grows in direct proportion to the knowledge of the people who use them.

Primavera Training consultants offer a full suite of Primavera classes to help make your implementation successful. The classes combine theory and practice, with some lecture and product interaction. Students use hands-on exercises and a case study approach to reinforce concepts and gain practical experience in using the software.

Primavera training focuses on ensuring that your Primavera users understand their software thoroughly and know how to optimize their productivity using it. To help them choose the most effective course sequence, Primavera provides training targeted by role. Our standard courses can also be customized to fit your business needs.

## LIST OF COURSES

Course Title	PMI		
	PDU's	CEU's	Course Code
Primavera P6 Professional Fundamentals Rel 8.2			
Primavera P6 Professional Advanced Rel8.2			
Primavera P6 Fundamentals Rel 8.2			
Primavera P6 Advanced Rel 8.2			
Primavera P6 Rel 8.0 Fundamentals	32.5	3.25	101-R8
Managing Projects in Primavera P6 Professional Rel 8.0	32.5	3.25	102-R8
Managing Resources in Primavera P6 Professional Rel 8.0	13	1.3	106R-R8
Managing Portfolios in Primavera P6 Rel 8.0	6.5	0.65	
Primavera P6 Application Administration Rel 8.x			
Project Management in Primavera P6 Rel 7	19.5	1.95	102
Advanced Project Management in Primavera P6 Rel 7	13	1.3	106P
Resource Management in Primavera P6 Rel 7	13	1.3	106R
Administration in Primavera P6 and P6 Web Access Rel 7	6.5	0.65	106A
Project Management in Primavera P6 Web Access Rel 7	19.5	1.95	101
Resource Management in Primavera P6 Web Access Rel 7	13.5	1.2	107
Portfolio Management in Primavera P6 Web Access Rel 7	6.5	0.65	109
Migrating from P3 to Primavera P6	13	1.2	108
Managing Projects in Primavera Contractor Rel 6	13	1.3	700
Resource and Cost Analysis in Primavera Project Planner (P3) Rel 3	6.5	0.65	602
Planning and Scheduling in Primavera Project Planner (P3) Rel 3	19.5	1.95	601
Managing Project Data in Primavera Project Planner (P3) Rel 3	6.5	0.65	603
Project Risk Management in Primavera Pertmaster Rel 8.6	19.5	1.95	501
Primavera Contract Management Rel 14	19.5	1.95	
Primavera Contract Management Rel 13	19.5	1.95	E202

## **Primavera P6 Enterprise Project Portfolio Management**

### **Primavera P6 Professional Fundamentals Rel 8.2**

This course leads participants through the entire project life cycle, from planning to execution. Topics include adding activities, assigning resources, and creating a baseline. Participants also gain a thorough background in the concepts of planning and scheduling.

All workshops and instruction stress the three basic elements of project management: schedule, resources, and costs. At the end of each day, students apply the concepts and functionality they learned in a case study. The course is divided into three sections: Creating a Project; Scheduling the Project; Project Execution and Control.

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.

Professional Development and Continuing Education Units: Earns 19.5 PDUs and 1.95 CEUs

Course level: **Basic**

Target role: **Program Managers, Project Managers, Project Coordinators & Planners/Schedulers, Business Analysts, End Users, Functional Implementer**

Additional audiences: **Existing project management module users, Existing P3e/c, Enterprise, and Team Play users.**

#### ***Professional Development and Continuing Education Units:***

- Earns 19.5 PDUs and 1.95 CEUs

***Prerequisite:*** Knowledge of Project Management principles

***Course Length:*** 19.5 hrs

#### **Course Objectives:**

- Understand data structures
- 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

## **Course Outline:**

### **Understanding P6 Data**

- Describing Enterprise and Project-Specific data
- Logging In
- Opening an Existing Project
- Opening and Customizing Layouts

### **Enterprise Project Structure**

- Describing Components of EPS

### **Creating a Project**

- Create a project
- Navigating in the Projects Window
- Viewing Project Details

### **Creating a Work Breakdown Structure**

- Defining a Work Breakdown Structure
- Creating the WBS Hierarchy

### **Adding Activities**

- Describing an Activity and its Components
- Describing Activity Types
- Adding Activities

- Adding a Notebook Topic
- Adding Steps to an Activity
- Assigning Activity Codes

### **Creating Relationships**

- Viewing a Network Logic Diagram
- Relationship Types
- Creating Relationships

### **Scheduling**

- Performing a Forward and Backward Pass
- Describing Float

### **Assigning Constraints**

- Applying an Overall Deadline to a Project
- Apply a Constraint to an Activity

### **Using Reflection Projects**

- Creating a Reflection Project
- Merging Changes

### **Formatting Schedule Data**

- Grouping Activities
- Sorting
- Filtering

### **Roles and Resources**

- Describing Roles and Resources
- Viewing Dictionaries

### **Assigning Roles**

- Assigning Roles to an Activity
- Assign Rates on Roles

### **Assigning Resources**

- Assigning Resources
- Adjusting Budgeted Units/Time

### **Analyzing Resources**

- Displaying the Resource Usage Profile

### **Optimizing the Project Plan**

- Analyzing Schedule Dates
- Shortening a Project Schedule
- Analyzing Resource Availability

### **Baselining the Project Plan**

- Creating a Baseline Plan
- Display Baseline Bars on the Gantt Chart

### **Project Execution and Control**

- Describing Methods for Updating the Schedule
- Using Progress Spotlight
- Statusing Activities
- Rescheduling the Project

### **Reporting Performance**

- Describing Reporting Methods
- Running a Schedule Report
- Creating a report with the Report Wizard

### **Suggested Next Course(s):**

- [Primavera P6 Professional Advanced R8.2](#)

## ***Primavera P6 Professional Advanced R8.2***

This course provides in-depth resource management and project management training in Primavera P6 Professional. Resource management topics include manual allocation, bucket planning, and leveling. Project management topics include earned value analysis, advanced scheduling, and timescaled logic diagrams.

### **Learn To:**

- Use bucket planning
- Use resource leveling
- Use earned value analysis
- Calculate percent complete
- Calculate multiple float paths
- Analyze resource usage

Course level: **Advanced**

Target role: **Program Managers, Project Managers, Project Coordinators & Planners/Schedulers, Business Analysts, End Users, Functional Implementer**

Additional audiences: **Existing project management module users, Existing P3e/c, Enterprise, and Team Play users.**

### ***Professional Development and Continuing Education Units:***

- Earns 13 PDUs and 1.3 CEUs

***Required Prerequisite:*** Primavera P6 Professional Fundamentals Rel 8.2

***Course Length:*** 13 hrs

### **Course Objectives:**

- Analyze resources and roles
- Use the Assignments window
- Assign cost accounts
- Analyze resources
- Bucket planning
- Level resources
- Use earned value
- Calculate percent complete
- Use advanced scheduling techniques



- Use timescaled logic diagrams

## Course Topics:

### Using Earned Value Analysis

- Calculating Planned Value Cost
- Calculating Actual Cost
- Calculating Earned Value Cost
- Measuring Performance Percent Complete

### Managing Multiple Projects

- Opening Multiple Projects
- Setting the Default Project

### Analyzing Resources and Roles

- Using the Resource Usage Profile
- Using the Resource Usage Spreadsheet

### Manually Allocating Resources

- Viewing the Assignments Window
- Viewing and Editing Allocation

### Using Bucket Planning

- Editing Future Buckets
- Using Curves

### Leveling Resources

- Setting Leveling Options
- Leveling Based on Priority

### Advanced Scheduling

- Multiple Float Paths
- Calendar Effect on Lag
- Scheduling Out-of-Sequence Activities

### Timescaled Logic Diagrams

- Choosing a Template

- Filtering Data

### ***Primavera P6 Fundamentals Rel 8.2***

Participants will create a project, add activities and relationships, assign resources, adjust the project plan to account for schedule delays and overallocated resources, and analyze portfolios. Participants also will learn how to customize the Personal Workspace and the Project Workspace to monitor project progress and communicate with team members. Oracle BI and BPM are not covered in this course.

The course uses P6, Primavera' Web-based project management tool. It is divided into four sections: Overview and Creating a Project; Scheduling the Project and Managing Data; Assigning Resources and Baselining; and Project Execution and Control.

Professional Development and Continuing Education Units: Earns 32.5 PDUs and 3.25 CEUs

#### **Learn to:**

- Create a project
- Add activities
- Create relationships
- Assign and analyze resources
- Analyze project performance
- Execute and control the project
- Customize dashboards and the Project Workspace
- View reports

Course level: **Basic**

Target role: **Program Managers, Project Managers, Project Coordinators & Planners/Schedulers, Business Analysts, End Users, Functional Implementer**

Additional audiences: **Existing project management module users, Existing P3e/c, Enterprise, and Team Play users.**

#### ***Professional Development and Continuing Education Units:***

- Earns 32.5 PDUs and 3.25 CEUs

***Prerequisite:*** Knowledge of Project Management principles

***Course Length:*** 32.5 hrs

## 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
- Analyze resources and costs
- Baseline the project plan
- Execute the project
- Customize dashboards
- Manage risk
- View reports

## Course Topics:

### Understanding P6 Data

- Describing the Organizational Breakdown Structure
- Describing the Enterprise Project Structure

### Creating a Project

- Viewing the EPS Page
- Modifying Project Information

### Creating a Work Breakdown Structure

- Creating Multiple Levels

### Adding Activities

- Describing Activity Types
- Viewing Activity Information
- Editing Activity Details
- Assigning Steps
- Assigning Codes

### **Using Activity Views**

- Customizing a View
- Filtering Data
- Grouping and Sorting Data

### **Creating Relationships**

- Viewing Relationship Types
- Creating Relationships in the Gantt Chart

### **Scheduling a Project**

- Defining Key Terms
- Defining Total Float
- Describing Loops and Open Ends
- Calculating a Schedule

### **Assigning Constraints**

- Applying a Must Finish By Date
- Constraining an Activity

### **Optimizing the Project Schedule**

- Analyzing Schedule Dates
- Shortening a Project Schedule

### **Viewing the Project Workspace**

- Adding and Removing Portlets
- Customizing the Project Workspace

### **Assigning Roles and Resources**

- Assigning a Role
- Requesting Resources
- Assigning Resources
- Checking Resource Availability

### **Calendars**

- Defining Work Types
- Editing a Project Calendar
- Assigning a Calendar to an Activity

### **Baselining the Project Plan**

- Selecting a Baseline
- Adding a Baseline

### **Executing the Project Plan**

- Describing Methods of Applying Progress
- Using Progress Spotlight
- Defining the Data Date
- Applying Progress to Activities

### **Analyzing the Updated Project**

- Comparing Dates
- Viewing Schedule Performance
- Addressing Variances

### **Viewing Dashboards**

- Customizing Dashboards
- Adding and Removing Dashboards
- Viewing Portfolio Data

### **Managing Issues**

- Creating a Issues
- Viewing Issues

### **Managing Risk**

- Creating Project Risks
- Developing a Risk Response Plan

### **Suggested Next Courses:**

- Primavera P6 Advanced Rel 8.2

## ***Primavera P6 Advanced Rel 8.2***

This course provides hands-on training on advanced resource management and project management in P6, Primavera's Web-based project management application.

Topics include creating resource teams and role teams; high-level resource planning; resource leveling; viewing and analyzing portfolio performance; assessing return on investment; capacity planning and waterline analysis; and earned value analysis.

Case studies reinforce new skills and functionality.

### **Learn To:**

- Use high-level resource planning
- Use resource leveling
- Staff resource requests
- Create resource teams and role teams
- Use high-level resource planning
- Assess portfolio performance
- View return on investment data
- Conduct waterline analysis
- Use advanced scheduling techniques

Course level: **Advanced**

Target role: **Program Managers, Project Managers, Project Coordinators & Planners/Schedulers, Business Analysts, End Users, Functional Implementer**

Additional audiences: **Existing project management module users, Existing P3e/c, Enterprise, and Team Play users.**

### ***Professional Development and Continuing Education Units:***

- Earns 13 PDUs and 1.3 CEUs

**Prerequisite:** Knowledge of project management principles

Primavera P6 Fundamentals Rel 8.2

**Course Length:** 13 hrs

## Course Objectives:

- View portfolio performance
- Use advanced scheduling techniques
- Analyze portfolio performance
- Manage multiple projects
- Create resource teams
- Use high-level resource planning
- Staff resource requests
- Create a portfolio
- Use resource leveling

## Course Topics:

### Creating Resource Teams and Role Teams

- View the Resource Team Summary portlet.
- View the Open Requests for Resources portlet.

### Viewing Portfolio Performance

- Review performance thresholds.
- Use earned value analysis.

### Viewing Portfolio Information

- View return on investment data.
- View data in the Gantt Chart.

### Analyzing Portfolios

- Create a portfolio view.
- View waterline analysis.
- Create a scenario.
- View the Capacity Planning page.

### High-Level Resource Planning

- Assign resources and roles.
- Using Committed and Life of Project assignments.

### Managing Allocation

- Using the Resource Usage tab to analyze units and costs.
- Grouping data on the Assignments page.

### **Staffing Resource Requests**

- Use resource search.

### **Resource Leveling**

- Set leveling options.
- Assign leveling priorities.

### **Advanced Scheduling**

- Multiple float paths.
- Scheduling logic options.



## **Primavera P6 Rel 8.0 Fundamentals**

Participants will create a project, add activities and relationships, assign resources, adjust the project plan to account for schedule delays and over allocated resources, and analyze portfolios. Participants also will learn how to customize the Personal Workspace and the Project Workspace to monitor project progress and communicate with team members. Enhanced risk management and project templates -- new for P6 R8 -- are covered. BI and BPM are not covered in this course.

The course is divided into five sections: Overview and Creating a Project; Scheduling the Project and Managing Data; Assigning Resources and Baselineing; Project Execution and Control; and Project Closeout and Advanced Topics.

Course level: **Basic**

Target role: **Program Managers, Project Managers, Project Coordinators & Planners/Schedulers, Business Analysts, End Users, Functional Implementer**

Additional audiences: **Existing project management module users, Existing P3e/c, Enterprise, and Team Play users.**

### ***Professional Development and Continuing Education Units:***

- Earns 32.5 PDUs and 3.25 CEUs

***Prerequisite:*** Knowledge of Project Management principles

***Course Length:*** 32.5 hrs

### **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
- Analyze resources and costs
- Baseline the project plan
- Execute the project

- Customize dashboards
- Manage risk
- Create project templates

## Course Outlines

- **Understanding P6 Data**
  - Describing the Organizational Breakdown Structure
  - Describing the Enterprise Project Structure
- **Creating a Project**
  - Viewing the EPS Page
  - Modifying Project Information
- **Creating a Work Breakdown Structure**
  - Creating Multiple Levels
- **Adding Activities**
  - Describing Activity Types
  - Viewing Activity Information
  - Editing Activity Details
  - Assigning Steps
  - Assigning Codes
- **Using Activity Views**
  - Customizing a View
  - Filtering Data
  - Grouping and Sorting Data
- **Creating Relationships**
  - Viewing Relationship Types
  - Creating Relationships in the Gantt Chart
- **Scheduling a Project**
  - Defining Key Terms
  - Defining Total Float
  - Describing Loops and Open Ends
  - Calculating a Schedule
- **Assigning Constraints**
  - Applying a Must Finish By Date
  - Constraining an Activity
- **Optimizing the Project Schedule**
  - Analyzing Schedule Dates
  - Shortening a Project Schedule
- **Viewing the Project Workspace**
  - Adding and Removing Portlets
  - Customizing the Project Workspace
- **Assigning Roles and Resources**
  - Assigning a Role
  
  - Requesting Resources
  - Assigning Resources

- Checking Resource Availability
- **Calendars**
  - Defining Work Types
  - Editing a Project Calendar
  - Assigning a Calendar to an Activity
- **Baselining the Project Plan**
  - Selecting a Baseline
  - Adding a Baseline
- **Executing the Project Plan**
  - Describing Methods of Applying Progress
  - Using Progress Spotlight
  - Defining the Data Date
  - Applying Progress to Activities
- **Analyzing the Updated Project**
  - Comparing Dates
  - Viewing Schedule Performance
  - Addressing Variances
- **Viewing Dashboards**
  - Customizing Dashboards
  - Adding and Removing Dashboards
  - Viewing Portfolio Data
- **Project Templates**
  - Creating a Template from a Project
  - Creating a New Project from a Template.
  - Tailoring a Project by Adding a WBS from a Template.
- **Managing Risk**
  - Creating Project Risks
  - Developing a Risk Response Plan
- **Advanced Scheduling**
  - Calculating Multiple Float Paths
  - Describing Calendar Effect on Lag

## *Managing Projects in Primavera P6 Professional Rel 8.0*

This course leads participants through the entire project life cycle, from planning to execution. Topics include adding activities, assigning resources, and creating a baseline. Participants also gain a thorough background in the concepts of planning and scheduling and are introduced to advanced project analysis methods such as earned value. All workshops and instruction stress the three basic elements of project management: schedule, resource and costs. At the end of each day, students apply the concepts and functionality they learned in a case study. The course is divided into five sections: Overview and Creating a Project; Scheduling the Project and Managing Data; Assigning Resources and Baselineing; Project Execution and Control; and Advanced Topics.

Course level: **Basic**

Target role: **Program Managers, Project Managers, Project Coordinators & Planners/Schedulers, Business Analysts, End Users, Functional Implementer**

Additional audiences: **Existing project management module users, Existing P3e/c, Enterprise, and Team Play users.**

### ***Professional Development and Continuing Education Units:***

- Earns 32.5 PDUs and 3.25 CEUs

***Prerequisite:*** Knowledge of Project Management principles

***Course Length:*** 32.5 hrs

### **Course Objectives**

- Manage multiple projects
- 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 and costs
- Analyze resources

- Optimize the project plan
- Execute the project
- Use earned value analysis

## Course Topics

- **Understanding P6 Data**
  - Describing Enterprise and Project-Specific data
  - Logging In
  - Opening an Existing Project
  - Opening and Customizing Layouts
- **Enterprise Project Structure**
  - Describing Components of EPS
- **Creating a Project**
  - Create a project
  - Navigating in the Projects Window
  - Viewing Project Details
- **Creating a Work Breakdown Structure**
  - Defining a Work Breakdown Structure
  - Creating the WBS Hierarchy
- **Adding Activities**
  - Describing an Activity and its Components
  - Describing Activity Types
  - Adding Activities
  - Adding a Notebook Topic
  - Adding Steps to an Activity
  - Assigning Activity Codes
- **Creating Relationships**
  - Viewing a Network Logic Diagram
  - Relationship Types
  - Creating Relationships
- **Scheduling**
  - Performing a Forward and Backward Pass
  - Describing Float
- **Assigning Constraints**
  - Applying an Overall Deadline to a Project
  - Apply a Constraint to an Activity
- **Maintaining the Project Documents Library**
  - Creating a Document Record
  - Linking a Document Record
- **Formatting Schedule Data**
  - Grouping Activities
  - Sorting
  - Filtering
- **Roles and Resources**
  - Describing Roles and Resources

- Viewing Dictionaries
- **Assigning Roles**
  - Assigning Roles to an Activity
  - Assign Rates on Roles
- **Assigning Resources**
  - Assigning Resources
  - Adjusting Budgeted Units/Time
- **Analyzing Resources**
  - Displaying the Resource Usage Profile
- **Optimizing the Project Plan**
  - Analyzing Schedule Dates
  - Shortening a Project Schedule
  - Analyzing Resource Availability
- **Baselining the Project Plan**
  - Creating a Baseline Plan
  - Display Baseline Bars on the Gantt Chart
- **Project Execution and Control**
  - Describing Methods for Updating the Schedule
  - Using Progress Spotlight
  - Stating Activities
  - Rescheduling the Project
- **Reporting Performance**
  - Describing Reporting Methods
  - Running a Schedule Report
  - Creating a report with the Report Wizard
- **Advanced Project Analysis**
  - Using Duration Types
  - Using Percent Complete Types
  - Using Earned Value Analysis
- **Advanced Scheduling**
  - Managing Multiple Float Paths

## ***Managing Resources in Primavera P6 Professional Rel 8.0***

This course provides in-depth resource management training in Primavera P6 Professional. The course covers advanced topics in managing resource allocation, future-period bucket planning, and resource leveling. Extended case studies at the end of each day provide an opportunity to apply new skills and functionality. You will first assign resources and analyze their allocation. At the end of the second day, you will apply what you have learned to resolve resource over allocation.

Course level: **Advanced**

Target role: **Program Managers, Project Managers, Project Coordinators & Planners/Schedulers, Business Analysts, End Users, Functional Implementer**

Additional audiences: **Existing project management module users, Existing P3e/c, Enterprise, and Team Play users.**

### ***Professional Development and Continuing Education Units:***

- Earns 13 PDUs and 1.3 CEUs

***Prerequisite:*** Basic project management knowledge

***Suggested Prerequisite:*** Managing Projects in Primavera P6 Professional Rel 8.0

***Course Length:*** 13 hrs

### **Course Objectives**

- Create resources and roles
- Resource reporting
- Assign cost accounts
- Analyze resources
- Bucket planning
- Level resources
- Store period performance

### **Course Topics**

- **Creating Resources and Roles**
  - Describing Resource Security
  - Creating a resource
  - Creating a role
- **Assigning Cost Accounts**
  - Assigning Cost Accounts to Expenses
- **Analyzing Resources and Roles**

- Using the Resource Usage Profile
  - Using the Resource Usage Spreadsheet
- **Manually Allocating Resources**
  - Viewing the Assignments Window
  - Viewing and Editing Allocation
- **Using Bucket Planning**
  - Editing Future Buckets
  - Using Curves
- **Leveling Resources**
  - Setting Leveling Options
  - Leveling Based on Priority
- **Resource Reporting**
  - Running a Resource Report
  - Using the Layout to Create a Report



### *Managing Portfolios in Primavera P6 Rel 8.0*

This course provides hands-on training on managing portfolios in P6 Web. Topics include creating a portfolio, viewing and analyzing portfolio performance, creating portfolio views, assessing return on investment, capacity planning, waterline analysis, and displaying portfolio data on a dashboard. A case study at the end of the day reinforces new skills and functionality.

Course level: **Basic**

Target role: **Program Managers, Project Managers, Project Coordinators & Planners/Schedulers, Business Analysts, End Users, Functional Implementer**

Additional audiences: **Existing project management module users, Existing P3e/c, Enterprise, and Team Play users.**

### *Professional Development and Continuing Education Units:*

- Earns 6.5 PDUs and .65 CEUs

**Prerequisite:** Basic project management knowledge

**Suggested Prerequisite:** Primavera P6 Rel 8.0 Fundamentals

**Course Length:** 6.5 hrs

### **Course Objectives**

- Create a portfolio
- View portfolio performance
- View portfolio information
- Analyze portfolio performance
- View portfolio data on a dashboard

### **Course Topics**

- **Using Portfolios**
  - Selecting a portfolio
  - Creating a portfolio favorite
  - Setting preferences
- **Viewing Portfolio Performance**
  - Reviewing performance thresholds
- **Viewing Portfolio Information**
  - Viewing return on investment data
  - View data in the Gantt Chart
  - Customizing the Gantt Chart

- **Analyzing Portfolios**
  - Creating a portfolio view
  - Viewing waterline analysis
  - Creating a scenario
  - Viewing Capacity Planning page
- **Portfolios and Dashboards**
  - Viewing portfolio data on a dashboard
  - Creating a portfolio view

### **Primavera P6 Application Administration Rel 8.x**

The two-day course covers how to build enterprise data structures and configure settings to support an enterprise implementation.

Among topics covered: How to build and manage the EPS and OBS; add users and configure security; set enterprise data and default settings; and support project management processes.

#### **Learn To:**

- Manage EPS and OBS
- Create resources and roles
- Configure security
- Manage enterprise settings
- Support project management processes

Target role: **Project Manager, Functional Implementer, Administrator**

**Course Length:** 13 hrs

#### **Course Objective:**

- Add resources
- Add users
- Configure security
- Set enterprise data
- Set project data
- Establish project defaults
- Manage reporting
- Build OBS
- Build EPS

#### **Course Outline**

##### **Managing the EPS**

- Elements of the EPS
- Benefits of the EPS

##### **Managing the OBS**

- Elements of the OBS
- Configuring users

### **Defining Resources and Roles**

- Specifying rates for roles
- Setting role limits
- Creating a resource
- Assigning resource and role teams

### **Enterprise Data**

- Creating financial periods
- Creating a global calendar
- Viewing UDFs

### **User Access**

- Adding users
- Creating security profiles
- Creating user accounts
- User interface views

### **Planning the Project**

- Prioitizing projects
- Using capacity planning
- Using waterline analysis

### **Setting Project Defaults**

- Duration Type
- Activity Type
- Percent Complete Type

### **Updating the Project**

- Selecting an updating method
- Managing baselines

### **Publishing Data and Reporting**

- Defining publication periods
- Managing reports

## **Basic Project Management in Primavera P6 Client/Server Rel 7 - 102**

This course provides hands-on training for Primavera's client/server based solution. Participants will gain a thorough background in the concepts of planning and scheduling. Scheduling techniques will be covered. This five-day course leads you through hands-on workshops that create and track an entire project to completion. All workshops and instruction use the three basic elements of project management: schedule, resource and costs.

Course level: **Basic**

Target role: **Program Managers, Project Managers, Project Coordinators & Planners/Schedulers**

Additional audiences: **Existing project management module users, Existing P3e/c, Enterprise, and Team Play users.**

### ***Professional Development and Continuing Education Units:***

- Earns 19.5 PDUs and 1.95 CEUs
- PMI Program Number - 102

***Prerequisite:*** Knowledge of Project Management principles

***Course Length:*** 19.5 hrs

### **Course Outlines**

*Day One:*

- Introduction
- Project Management Life-cycle
- Navigating
- Enterprise Project Structure
- Creating a Project

*Day Two:*

- Creating a Work Breakdown Structure (WBS)
- Adding Activities
- Creating Relationships
- Scheduling
- Adding Constraints

*Day Three:*

- Maintaining the Project Documents Library
- Grouping, Sorting & Filtering Data
- Defining Resources & Roles
- Assigning Roles

*Day Four:*

- Assigning Resources and Costs
- Analyzing Resources and Costs
- Optimizing the Project Plan

*Day Five:*

- Baselining the Project Plan
- Project Execution and Control
- Reporting Performance
- Project Web Site

**Advanced Project Management in Primavera P6 Client/Server Rel 7 – 106-P**

This course provides in-depth project management training in Primavera’s client/server-based solution. Building off skills learned in the basic course (102), the 106-P course covers advanced subjects such as earned value management; updating baselines; and top-down budgeting. Hands-on workshops enable students to apply skills learned throughout the course.

Course level: **Advanced**

Target role: **Program Managers, Project Managers, Administrators, And Planners/Schedulers & Cost Controllers.**

Additional audiences: **Existing project management module users. Existing P3e/c, Enterprise, and Team Play users**

***Professional Development and Continuing Education Units:***

- Earns 13 PDUs and 1.3 CEUs
- PMI Program Number – 106-P

***Prerequisite:*** Basic Project Management in Primavera P6 Client/Server Course

***Course Length:*** 13 hrs

**Course Outline**

*Day 1*

- Creating and Managing Portfolios
- User Defined Fields and Global Change
- Assigning Codes
- Duration Types
- Thresholds and Issues

*Day 2*

- Advanced Scheduling
- Updating Baselines
- Tracking Layouts
- Top - Down Budgeting
- Top - Down Estimating
- Transferring Data between Primavera and Excel
- Claim Digger

*Day 3*

- Percent Complete Types
- Earned Value Analysis
- Activity Usage Profile & Spreadsheet
- Auto Compute Actuals
- Importing and Exporting Data



## *Resource Management in Primavera P6 Client/Server Rel 7 – 106-R*

This course provides in-depth resource management training in Primavera's client/server-based solution. Building off skills learned in the basic course (102), the 106-R course covers advanced topics in managing resource allocation, future-period bucket planning and resource leveling. Extended workshops at the end of each day provide an opportunity to apply new skills and functionality.

Course level: **Advanced**

Target role: **Resource Managers, Program Managers, Project Managers, Planners/Schedulers & Cost Controllers**

Additional audiences: **Existing project management module users. Existing P3e/c, Enterprise, and Team Play users**

### ***Profession Development and Continuing Education Units:***

- Earns 13 PDUs and 1.3 CEUs
- PMI Program Number – 106-R

***Prerequisite:*** Basic Project Management in Primavera P6 Client/Server Course

***Course Length:*** 13 hrs

### **Course Outline**

#### *Day 1*

- Creating Resources and Roles
- Assigning Cost Accounts
- Resource and Role Analysis
- Resource Assignments Window

#### *Day 2*

- Manually Allocated Resources
- Bucket Planning
- Leveling Resources
- Storing Financial Periods

*Day 3*

- Settings for Computing Activity and Resource Data
- Creating Resource Calendars
- Workshop 1
- Workshop 2

## *Administration in Primavera P6 and P6 Web Access Rel 7 – 106-A*

This course provides guidance on setting up enterprise data in P6 Client-Server and P6 Web, including the creation of calendars, project codes, activity codes, resource codes, financial periods, and cost accounts. Also covers how to set up users and establish security.

Course level: **Advanced**

Target role: **Chief Planners, P6 system administrators.**

Additional audiences: **Existing P6 Project Management module users with admin superuser access privileges.**

### ***Professional Development and Continuing Education Units:***

- Earns 6.5 PDUs and 0.65 CEUs
- PMI Program Number – 106-A

***Prerequisite:*** Basic Project Management in Primavera P6 Client/Server Course

***Course Length:*** 6.5 hrs

### **Course Outline**

- Creating Calendars
- Defining Project Codes
- Defining Resource Codes
- Defining Activity Codes
- User Access
- Summarizing Project Data & Running Job Services
- User-Defined Fields and Global Change
- Financial Periods
- Defining Cost Accounts
- Web Administration

## *Project Management in Primavera P6 Web Access Rel 7 - 101*

This course provides hands-on training for Primavera's Web-based solution. Participants will create a project, create activities and relationships, customize activity views, assign resources, adjust the project plan to account for schedule delays and overallocated resources, and analyze portfolios. Participants also will customize dashboards. Hands-on workshops help students create and track an entire project to completion.

Course level: **Basic**

Target role: **Program Managers, Project Managers, P6 Client-Server Users**

Additional audiences: **Existing Primavera Web users**

### ***Professional Development and Continuing Education Units:***

- Earns 19.5 PDUs and 1.95 CEUs
- PMI Program Number - 101

***Prerequisite:*** Fundamental Project Management knowledge Training.

***Course Length:*** 19.5 hrs

### **Course Outline**

#### *Day One:*

- Introduction
- Describe Primavera modules
- Customize Personal Workspace
- Describe the Project Management Life Cycle
- Describe Enterprise Project Structure and Work Breakdown Structure

#### *Day Two:*

- Create a project
- Customize the Project Workspace and Workgroup
- Create a Work Breakdown Structure
- Adding activities

*Day Three:*

- Creating relationships
- Schedule the project
- Assign constraints

*Day Four:*

- Assign resources
- Optimize the project plan
- Execute the project plan
- Analyze the current project

*Day Five:*

- Initiate a project request
- Manage documents
- Creating and analyzing portfolios

## *Resource Management in Primavera P6 Web Access Rel 7 - 107*

This course provides hands-on training for Primavera's Web-based solution. Participants will gain a thorough background in the concepts of resource management by adding a resource to the enterprise resource pool; planning for resource needs in future projects; staffing resources on current projects; and managing resources to ensure they are fully utilized. Extended workshops provide an opportunity to apply new skills and functionality.

Course level: **Basic**

Target role: **Resource Managers, Project Managers**

Additional audiences: **Existing Primavera Web users**

### ***Professional Development and Continuing Education Units:***

- Earns 13 PDUs and 1.3 CEUs
- PMI Program Number - 107

***Prerequisite:*** Fundamental Project Management Training

***Course Length:*** 13 hrs

### **Course Outline**

*Day One:*

- Introduction to Primavera
- Overview and Navigation
- Personal Workspace
- Administering the Resource Pool
- Resource Planning

*Day Two:*

- Managing Allocation
- Staffing Resource Requests
- Project Workspace and Workgroups
- Creating Resource Teams
- Creating Role Teams

*Case Studies:*

- Case Study 1: Add a resource; use resource in high-level resource planning; create a resource team.
- Case Study 2: Fill unstaffed assignments; assess resource allocation.

## **Portfolio Management in Primavera P6 Web Access Rel 7 - 109**

This course provides hands-on training on managing portfolios in P6 Web. Topics include creating a portfolio, viewing and analyzing portfolio performance, creating portfolio views, capacity planning, waterline analysis, and managing issues and risks. A case study at the end of the day reinforces new skills and functionality.

Course level: **Basic**

Target role: **Portfolio Managers, Project Managers, Executives**

Additional audiences: **Existing Primavera Web users, including users of earlier versions of the software (i.e., Primavision and myPrimavera).**

***NOTE: This is a standard, software functionality-based class. Industry specific offerings/examples are not included in standard classes.***

### **Professional Development and Continuing Education Units:**

- Earns 6.5 PDUs and .65 CEUs
- PMI Program Number – 109

**Prerequisite:** Project Management in Primavera P6 Web Access Rel 7 course is recommended but not mandatory required

**Course Length:** 6.5 hrs

### **Course Outline**

- Introduction to Portfolios
- Viewing Portfolio Performance
- Viewing Portfolio Information
- Analyzing Portfolios



## **Migrating from P3 to Primavera P6 - 108**

This course is specially designed for users moving from Primavera Project Planner (P3) to Primavera P6. Numerous charts list how P3 fields and functionality map to Primavera P6, enabling users to leverage their existing knowledge of P3 and rapidly adapt to new features in Primavera P6. The course begins with navigation, menus, and terminology in Primavera P6, and introduces new ways to view layouts and run reports. The course also details how basic tasks in the project management life cycle are executed in Primavera P6, including how to create activities, assign and analyze resources, and update the project plan. An appendix at the back of the manual covers how to convert projects from P3 to Primavera P6. (Please note that this course is designed for existing users of P3. Those who wish to learn Primavera P6, but are not P3 users, should register for Course 102.)

Course level: **Basic**

Target role: **Program managers, project managers, planners/schedulers who are currently using P3 Rel 3.**

***NOTE: This is a standard, software functionality-based class. Industry specific offerings/examples are not included in standard classes.***

### **Professional Development and Continuing Education Units:**

- Earns 13 PDUs and 1.3 CEUs
- PMI Program Number – 108

**Prerequisite:** Planning and Scheduling in Primavera Project Planner (P3) Rel 3 Course or experienced P3 users

**Course Length:** 13 hrs

## Course Outline

### *Day One:*

- Identify Major Hierarchical Structures
- Create a Project
- Add Activities
- Assign Duration Types to Activities

### *Day Two:*

- Identify New Date Fields
- Analyze Resource/Cost Usage
- Update a Project
- Format Schedule Data

### *Day Three:*

- Identify Activity Percent Complete Types
- Print Layouts
- Create and Print Reports
- Create User-Defined Fields
- Define and Run Global Change Statements

## **Primavera Contractor Application**

### **Managing Projects in Primavera Contractor Rel 6 - 700**

This course provides a comprehensive overview of Contractors. It examines how to use SureTrak for project planning, scheduling, control and analysis.

Course level: **Basic**

Target role: **Functional Implementers, Business Analysts, Project Managers, End Users**

#### **Professional Development and Continuing Education Units:**

- Earns 13 PDUs and 1.3 CEUs
- PMI Program Number – 700

**Prerequisite:** Knowledge of Project Management Principles

**Course Length:** 13 hrs

### **Course Outline**

#### *Day One:*

- Introduction
- Navigating
- Creating a project and Work Breakdown Structure
- Creating Activities
- Creating Relationships
- Scheduling the Project

#### *Day Two:*

- Assigning Constraints to a Project
- Adding Resources to a Project
- Optimizing the Project

#### *Day Three:*

- Baselining the Project
- Executing the Project
- Creating Output
- Customizing Projects
- Workshop Exercises

## **Primavera Project Planner (P3) Application**

### **Planning and Scheduling in Primavera Project Planner (P3) Rel 3 – 601**

This course is getting started with P3 through hands-on, basic training. Participants will gain a thorough background in the concepts of planning and scheduling while learning P3. The course leads you through nine hands-on workshops that create and track an entire project to completion, using the three basic elements of project management: schedule, resources, and costs. Scheduling techniques will be covered.

Course level: **Basic**

Target role: **Functional Implementers, Business Analysts, Project Managers, End Users**

#### **Professional Development and Continuing Education Units:**

- Earns 19.5 PDUs and 1.95 CEUs
- PMI Program Number – 601PPP

**Prerequisite:** Knowledge of Project Management Principles

**Course Length:** 20 hrs

#### **Course Outline**

##### *Day One:*

- Define the project and coding structures
- Assign resources and costs to a project

##### *Day Two:*

- Add and organize activity data
- Create target schedule

##### *Day Three:*

- Develop a project network with precedence relationships
- Enter statusing data to update a schedule

*Day Four:*

- Perform schedule calculations
- Store period performance
- Apply constraints to a schedule

*Day Five:*

- Produce project output
- Customize the project layout

***Resource and Cost Analysis in Primavera Project Planner (P3) Rel 3 - 602***

This course will enable you to take full advantage of driving resources, resource curves, hierarchical resources, resource profiles/tables and resource leveling. Learn resource calendars for planning and control and Rich Text Format reports for status reporting. Participants will develop, update, and track resources and costs using a series of hands-on workshops.

Course level: **Advanced**

Target role: **P3 users**

***Professional Development and Continuing Education Units:***

- Earns 6.5 PDUs and 0.65 CEUs
- PMI Program Number – 602PPP

***Prerequisite:*** Planning and Scheduling in Primavera Project Planner (P3) Rel 3 Course

***Course Length:*** 6.5 hrs

**Course Outline**

- Analyze resource usage through resource profiles
- Assign hierarchical resources
- Define driving resources
- Create resource/cost curves
- Run resource/cost reports
- Apply resource calendars to a schedule
- Level resources

## *Managing Project Data in Primavera Project Planner (P3) Rel 3 - 603*

This course provides hands-on training will take you beyond the fundamentals of scheduling a project by transferring project data through copy and paste, storing and retrieving fragments, and using import and export. In addition, global change, and custom data items will be used to modify activity data. Learn to enhance your presentation by including objects and symbols and post this information on your company intranet using the Web Publishing Wizard. You will become proficient at using the power of P3 for maximum control of your projects.

Course level: **Advanced**

Target role: **P3 users**

### ***Professional Development and Continuing Education Units:***

- Earns 6.5 PDUs and .65 CEUs
- PMI Program Number – 603PPP

***Prerequisite:*** Planning and Scheduling in Primavera Project Planner (P3) Rel 3 Course

***Course Length:*** 6.5 hrs

### **Course Outline**

- Create a project group
- Store and retrieve fragments
- Copy and paste data between projects
- Alter schedule logic in PERT
- Export/Import data to a spreadsheet and other formats
- Define and assign custom data items
- Modify project data through global change
- Use Primavera Draw
- Attach objects to activities
- Link objects to the layout
- Utilize "Fit to page" printing in PERT
- Display P3 data in Metafile format
- Create Intranet web pages using the Web Publishing Wizard

## **Primavera Risk Analysis Application**

### **Managing Risk in Primavera Risk Analysis Rel 8.6 - 501**

This introductory course is aimed at all new Risk Analysis software users and prospective users looking to evaluate and benefit from the full capabilities of Risk Analysis Software.

Course level: **Basic**

Target role: **Functional Implementers, Business Analysts, Project Managers, End Users**

**Professional Development and Continuing Education Units:**

- Earns 19.5 PDUs and 1.95 CEUs
- PMI Program Number – 501

**Prerequisite:** Knowledge of Project Management Principles

**Course Length:** 19.5 hrs

### **Course Outline**

#### *Day One:*

- Basic schedule and cost risk analysis theory
- Using three-point estimates
- An introduction to the Risk Register
- Running a quantitative risk analysis and understanding results: Bell-curves

#### *Day Two:*

- S-curves, criticality, sensitivity and cruciality, P-schedules
- Integration with MS Project and/or Primavera
- Advanced schedule and cost risk analysis theory
- Qualitative and quantitative risk assessment templating
- Correlation in theory and practice

#### *Day Three:*

- Risk mitigation - management cost/benefit analysis
- Management costs, liquidated damages, revenues, probabilistic cash flow
- Probabilistic and conditional branching



*Day Four:*

- An introduction to macros and extending Pertmaster
- Use it to explore topics further, optionally on your own data
- Practice techniques in your own time with trainer assistance
- Gain valuable confidence that will help you apply the training to your work

*Day Five: Workshop Training*

## **Primavera Contract Management Application**

### **Primavera Contract Management R14**

The course is aimed at project managers, contract managers, subcontractors, and suppliers. It covers the full gamut of contract management, including logging and tracking submittals, managing project costs, managing contracts, and managing purchase orders. The course also covers how to enter and track company- and project-related data in Contract Management.

#### **Learn To:**

- Log and track submittals
- Document project issues
- Manage project costs
- Award procurement items
- Manage contracts and purchase orders
- Manage payment requisitions

Course level: **Basic**

Target role: **End Users, Project Manager**

#### **Professional Development and Continuing Education Units:**

- Earns 19.5 PDUs and 1.95 CEUs

**Prerequisite:** Fundamental contract & document administration work experience.

**Course Length:** 19.5 hrs

#### **Course Objective**

- Use drawings
- Communicate project information
- Log and track submittals
- Document project issues
- Manage costs
- Award procurement items
- Manage contracts
- Customize layouts
- Connect to a P6 schedule
- Create a project

## **Course Outline**

### **Creating the Company Directory**

- Adding a New Company
- Copying Contacts

### **Creating a Project**

- Defining the Project

### **Managing Drawings**

- Adding a Document
- Recording Revisions
- Using Transmittals

### **Logging and Tracking Submittals**

- Creating a Submittal
- Defining Workflow
- Tracking Approvals

### **Recording Project Communication**

- Daily Reports
- Meeting Minutes

### **Managing Costs**

- Using the Cost Worksheet
- Defining Cost Codes

### **Managing Contracts**

- Budgeted and Committed Contracts
- Creating a Purchase Order
- Creating a Trend Document

### **Using Change Management**

- Documenting Quotes
- Completing Negotiations

### **Managing Payment Requisitions**

- Schedule of Values
- Retainage
- Updating and Certifying a Requisition

### **Using the Safety Module**

- Recording a Violation
- Generating an Injury or Illness Report

### **Connecting to a P6 Schedule**

- Linking to P6
- Documents and P6 Dates

### ***Primavera Contract Management Rel 13 - E202***

This course provides hands-on training for Primavera's web-based solution. During this five-day course, participants will learn project cost control and document management.

Course level: **Basic**

Target role: **Contract & Project Administrators, Contract Managers, Project Controls Managers, Document Controllers, Cost Controllers**

Additional audiences: **Existing Primavera Expedition users**

### ***Professional Development and Continuing Education Units:***

- Earns 19.5 PDUs and 1.95 CEUs
- PMI Program Number - 201

***Prerequisite:*** Fundamental contract & document administration work experience.

***Course Length:*** 19.5 hrs

### **Course Outline**

*Day One:*

- Introduction to Contract Management
- Navigation into Contract Manager & Control Center
- Setting up the Company Directory
- Tracking Drawings

*Day Two:*

- Letters, RFIs, and Telephone Records
- Tracking and Logging Submittals
- Creating Issues
- Daily Reports and Meeting Minutes

*Day Three:*

- Cost Codes & Cost Worksheets
- Awarding Procurement items

*Day Four:*

- Contracts, PO's & Trends
- Change Management

*Day Five:*

- Payment Requisitions & Tracking invoices
- Approval Process
- Safety