

Course Syllabus for 108: Migrating from P3 to Primavera P6

Duration: 2 Days

What you will learn

This course is specially designed for users moving from Primavera Project Planner (P3) to P6. Numerous charts list how P3 fields and functionality map to Primavera 5.0/6.0, enabling users to leverage their existing knowledge of P3 and rapidly adapt to new features in P6. The course begins with navigation, menus, and terminology in 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 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 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.)

Professional Development and Continuing Education Units:

Earns 13 PDUs or 1.2 CEUs

PMI Program Number – 108

Learn to

- Assign labor, nonlabor, and material resources to activities
- Use weighted steps to calculate Percent Complete
- Use Progress Spotlight
- Auto compute an activity
- Create a resource report with the Report wizard
- Publish activity layouts as HTML pages

Audience

- Business Analysts
- End Users
- Functional Implementer
- Project Manager

Prerequisites

Required Prerequisites

- Knowledge of P3

Suggested Prerequisites

- Planning and Scheduling in Primavera Project Planner (P3) Rel 3

Course Objectives

- Identify the similarities and differences between P3 and Primavera terminology
- Create a project
- Define and review activity information in Activity Details
- Identify new date fields in Primavera
- Format Schedule Data
- Identify the differences between labor, nonlabor and material resources
- Assign Roles
- Assign Resources and Costs
- Analyze Resources
- Calculate Percent Complete
- Baseline Project Plan
- Manage Auto Compute Actuals
- Run Reports

Course Topics

Introduction to Primavera

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- Describe Primavera solutions
- Describe P6
- Explain the difference between enterprise and project-specific data

Navigating in Primavera

- Log in
- Open an existing project
- Navigate in the Home window and Activities window
- Open an existing layout
- Customize a layout
- Save a layout
- Identify types of layouts

Menus and Terminology

- Identify the location of P3 commands in Primavera
- Identify the similarities and differences between P3 and Primavera terminology

Building Projects

- View and describe the Enterprise Project Structure
- Define the Work Breakdown Structure
- Create a project
- Navigate in the Projects window
- View and modify information in Project Details

Activities

- Define and review activity information in Activity
- Describe activity types

Dates in Primavera

- Identify Primavera date fields that are similar to those in P3.
- Identify new date fields in Primavera
- Review constraint dates
- Review actual dates

Formatting Schedule Data

- Group activities according to a specific criteria
- Sort activities
- Apply a filter
- Create a filter
- Modify bars in the Gantt Chart

Roles and Resources

- Describe roles
- Views the roles dictionary
- Describe resources
- Identify the differences between labor, nonlabor and material resources
- View the resource dictionary

Assigning Roles

- Assign roles to an activity
- Assign rates on roles

Assigning Resources and Costs

- Assign resources by role
- Assign labor, nonlabor, and material resources to activities
- Adjust Budgeted Units/Time for a resource

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- Assign expenses to activities

Analyzing Resources

- Display the Resource Usage Profile
- Format a profile
- Format the timescale

Duration Types

- Determine which Duration Type works best in a given situation
- Assign a Duration Type to an activity

Calculating Percent Complete

- Describe the three Percent Complete types
- Determine which Percent Complete type to use based on how your organization reports progress
- Explain how activity percentages are calculated based on the Percent Complete type chosen
- Use weighted steps to calculate Percent Complete

Baselining the Project Plan

- Create a baseline plan
- Display baseline bars on the Gantt Chart

Updating a Project

- Describe several methods for updating the project schedule
- Use Progress Spotlight
- Status activities
- Reschedule the project

Auto Compute Actuals

- Describe the business rules for auto compute actuals
- Auto compute an activity
- Analyze the effect of auto compute actuals on an activity
- Auto compute a resource
- Auto compute an expense

Printing Layouts

- Customize the appearance of headers and footers
- Publish activity layouts as HTML pages
- Reporting Performance
- Describe reporting methods
- Run a schedule report
- Create a resource report with the Report wizard
- Create a report using the current layout

Tips and Tricks

- Use Undo to reverse actions in a project
- Use fill down to copy data in cells
- Establish user-defined fields
- Define global change parameters
- Run a global change