

**Course Name: Primavera Project Planning and Control: Introduction**

Area of Study	Classroom Hours:
Project Management <b>Software</b>	7

**Description:**

This is a comprehensive course intended for all industries using Versions 4 to 8.2.

This course is ideal for people who would like to quickly gain an understanding of how Primavera operates and/or transition to P6 from Primavera P3, SureTrak, Microsoft Project, and other scheduling software packages.

Instructor-led classroom with hand-on activities.

The course is intended for an introductory user.

- Introduction
  - Purpose of Planning
  - Project Planning Metrics
  - Planning Cycle
  - Levels of Planning
  - Monitoring and Controlling a Project
- Creating a Project Plan
  - Understanding Planning and Scheduling Software
  - Enterprise Project Management
  - Understanding Your Project
  - Planning Without Resources
  - Monitoring Progress Without Resources
  - Scheduling With Resources, Roles & Budgets
  - Monitoring and Controlling a Resourced Schedule
- Starting Up and Navigation
  - Logging In
  - Welcome Form
  - The Home Workspace
  - The Projects Workspace
  - Opening One or More Projects
  - Opening a Portfolio
  - Navigating Around a Project
  - User Preferences - Date and Time Display
  - Right-clicking with the Mouse
  - Accessing Help
  - Application of Options within Forms
  - Closing Down
  - Terminology Differences between Industry Versions
- Creating a New Project
  - File Types
  - Creating a Blank Project
  - Setting Up a New Project
  - Project Architect Wizard and Methodology Manager
  - Importing a Project
  - Copy an Existing Project
  - Project Dates
  - Saving Additional Project and EPS Information - Notebook Topics

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## Primavera Project Planning and Control: Introduction (continued)

### Description (continued):

- Defining Calendars
  - Accessing Global and Project Calendars
  - Assigning the Project Default Project Calendar
  - Creating a New Calendar
  - Copying Calendars
  - Renaming a Calendar
  - Deleting a Calendar
  - Resource Calendars
  - Editing Calendar Working Days of an Existing Calendar
  - Adjusting Working Hours
  - Inherit Holidays and Exceptions from a Global Calendar
  - Calculation of Activity Summary Duration in Days
  - Database Default Calendar, WBS and Project Durations
- Creating a Primavera Project WBS
  - Opening and Navigating the WBS Workspace
  - Creating and Deleting a WBS Node
  - WBS Node Separator
  - Work Breakdown Structure Lower Pane Details
  - WBS Categories
  - Why a Primavera WBS is Important
- Adding Activities and Organizing Under the WBS
  - New Activity Defaults
  - Adding New Activities
  - Default Activity Duration
  - Copying Activities in Primavera
  - Copying Activities from other Programs
  - Elapsed Durations
  - Finding the Bars in the Gantt Chart
  - Activity Information – Bottom Layout
  - Assigning Calendars to Activities
  - Undo
  - Assigning Activities to a WBS Node
  - Reordering or Sorting Activities
  - Summarizing Activities Using WBS
  - Spell Check
- Formatting the Display
  - Formatting the Project Workspace
  - Understanding Forms
  - Formatting Columns
  - Formatting the Bars
  - Row Height
  - Format Fonts and Font Colors
  - Format Colors
  - Format Timescale
  - Inserting Attachments - Text Boxes and Curtain

### Students enrolled for this course should have the following:

Students should be familiar with Project Management Fundamentals and comfortable working in a Windows environment.

### Upon successful completion of this course, students will be able to:

Create new projects and contribute to existing instances.