

## 1013T/1013TN – Primavera P6 Professional Basic Course for Turnarounds

Course Level: Basic

Course Length: 3 day classes, or 4 night classes

Prerequisite: Proficiency with computers including typing, basic Microsoft Office skills

This turnaround basic Primavera P6 training course is designed to provide new and existing Primavera users an understanding of P6, and how to utilize it for turnaround scheduling. This course covers the typical user preference settings, EPS development, project creation, creating a work breakdown structure, calendars, activities, layouts, resources, scheduling, baselines, updating a schedule, and basic reporting.

### Course Topics

#### Session 01: Introduction

- The Turnaround Terminology and Process
- Where the schedule fits in the big scheme
- Values of Schedule
- The Primavera Technical Structure
- The Hierarchical Structure of P6 Data Session 02: User and Admin Preferences
- Understand how user preferences work
- Set up and establish user preferences for a turnaround scheduling
- Review and modify specific admin preferences

#### Session 03: Basic Navigation

- The P6 toolbars and menus
- The structure of typical P6 layouts (views)
- How to edit toolbars
- Saving and opening layouts
- P6 hot keys

#### Session 04: Creating the EPS

- How the EPS is utilized in the Primavera software
- How to create the EPS and the thought process behind it

#### Session 05: Creating a P6 Project

- Use the wizard to create a project, identifying the initial attributes
- Discuss and modify certain project settings and make critical adjustments before beginning project development
- Define the default settings for new activities
- Review the different activity duration types and how each calculate
- Review the activity percent complete types and how they affect earned value reporting
- Define other project settings typical for turnaround scheduling

#### Session 06: The P6 Work Breakdown Structure

- Identify a standard Turnaround Work Breakdown Structure (WBS)
- Fully utilize all (WBS) capabilities in the details view to make the schedule more user friendly for reporting, updating, and managing turnaround equipment plans/job plans
- Understand the concept of utilizing the WBS for moving data from historic or template projects into a new turnaround project file
- Build a WBS



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## Session 07: Creating Calendars

- Identify the three different types of calendars
- View and Edit Calendars

## Session 08: Adding and Configuring Activities

- Add an activity using the New Activity Wizard
- Review the different activity types
- Utilize a template to add Job Plans
- Perform a simple Global Change
- Use the Replace and Re-number Activities Functionality
- Use an Excel Template to Import Activity Data
- Understand the Different Relationship Types
- Add Activity Relationships utilizing different techniques
- Understand and apply Relationship Lag
- Understand Constraint Types and apply Constraints

## Session 09: Scheduling

- Understand Critical Path Method (CPM Scheduling)
- Understand the Data Date
- Understand Total Float and Free Float
- Resolve Circular Relationships
- Identify Open Ends
- Review the Schedule Log

## Session 10: Activity Codes

- Understand the difference between Global, EPS, and Project activity codes
- Understand unique Coding ID's for Primavera at an Enterprise level
- Build activity codes structures with smart code values
- Create a Code Assignment Layout
- Assign activity codes utilizing multiple techniques

## Session 11: Customizing Layouts

- Group and Sort activities
- Understand how to build and save a layout
- Utilize filters in layouts
- Edit appearances of fonts, row heights, and bars
- Import and Export Layouts

## Session 12: Creating and Assigning Resources

- Understand the fully resource loaded schedule
- Understand P6 resources and attributes
- Create a turnaround specific resource pool
- Understand different techniques for assigning resources to activities
- Review Resource Profiles

## Session 13: Optimizing the Project Plan

- Analyze schedule dates
- Analyze Critical Activities
- Shorten a project schedule
- Analyze resource allocation

## Session 14: Baselining the Project Plan

- Understand what a baseline is
- Understand the purpose for two baselines in turnaround scheduling
- Create a baseline and maintain that baseline against the existing project
- Edit and show the baseline bars in the Gantt chart
- Conduct baseline variance reporting
- Restore a Baseline
- Convert a Restored Baseline Back to the Baseline of the Current Schedule

## Session 15: Project Execution and Control

- Understand the Update Process and Required Reports
- Build a status entry layout



- Perform activity updates utilizing multiple techniques
- Advance the Data Date
- Resolve actual start and finish dates ahead of the data date
- Understand Retained Logic and Progress Override Schedule Options

### Session 16: P6 Reporting

- Understand the Reports Window
- Create a Report
- Run existing reports and review the output options
- Preview additional functionality in the P6 Report Editor



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