

Advanced Resource Management in Primavera P6 (2 Days)

What you will learn:

This course provides in-depth resource management training in Primavera P6. The course covers advanced topics in managing resource allocation, past-period financial storing, 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.

Learn to:

- Resource and role analysis
- Bucket planning
- Leveling resources
- Storing period performance
- Resource reporting
- Create resources and roles

Audience

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

Suggested Prerequisites:

- Basic project management knowledge
- Basic Project Management in Primavera P6
- Advanced Project Management in Primavera P6

Course Objectives:

- Create detailed roles and resources library
- Advanced Resource reporting
- Assign cost accounts
- Analyze resources
- Level resources
- Analyzing Roles and Resources
- Settings for Computing Activity and Resource Data
- Multiple Currencies
- Rate Sources and Rate Types
- Resource Assignments Advanced Options

Course Topics:

Leveling Resources

- Leveling Overview
- Leveling
- Analyzing the Leveled Project
- Leveling Based on Activity Priority
- Leveling Based on Project Priority

Creating & Analyzing Roles

- Describing Role/Resource Security
- Creating a role
- Setting role proficiency
- Assigning a role
- Assigning a resource by role

Defining and Assigning Cost Accounts

- Viewing the Cost Accounts Dictionary
- Creating the Cost Accounts Dictionary
- Assigning Cost Accounts to Resources
- Assigning Cost Accounts to Expenses
- Cost Accounts Columns

Resource Assignments Window

- The Resource Assignment Window
- Assignment Details
- General Tab
- Adjusting Assignments
- Viewing Nonlinear Allocation

Advanced Resource Reporting

- Update Activity and Resource Assignment Data
- Describe reporting methods
- Run a resource report
- Create a resource report with the Report Wizard
- Using the Layout to Create a Report

Settings for Computing Activity and Resource Data

- Unlinking Budgeted, At Completion
- Driving vs. Non-Driving Resources
- Driving Resource Assignment
- Non-Driving Resource Assignment

Resource Codes

- Defining Resource Codes
- Define resource codes
- Create values for resource codes
- Assign resource code values in Primavera
- Reporting Resource Data with Resource Codes

Defining Currency

- Currencies
- Base Currency
- Adding a New Currency
- Setting Up Currency User Preferences
- Currency Conversion Calculation
- Changing the View Currency
- Viewing Price/Unit Types

Rate Sources and Rate Types

- Understanding Rate Sources
- Understanding Rate Types
- Viewing Price/Unit Types
- Changing Rate Type

Resource Assignment Advanced Options

- Updating Actual Unit or Cost
- Auto Recalculate Actual Unit/Cost Option
- Cost - Unit link