

# Primavera P6 Enterprise Project Portfolio Management Professional (1Z0-1129) Certification Preparation

**Duration:** 8 Days (64 Hours)

The course covers the complete project lifecycle, from project creation and schedule development to resource management, project execution, portfolio analysis, risk management, and performance reporting. Through a combination of conceptual learning, hands-on labs, real-world case studies, and certification-focused exercises, participants gain the knowledge and experience required to effectively manage projects using Primavera P6 in enterprise environments.

The training follows a practical approach with extensive hands-on exercises, enabling participants to build, schedule, resource-load, baseline, update, analyze, and report on projects using industry best practices.

---

## Key Learning Outcomes

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

- Navigate and customize the Primavera P6 EPPM and P6 Professional environments.
- Understand Enterprise Project Structure (EPS), Organizational Breakdown Structure (OBS), and enterprise data management.
- Create and manage projects, Work Breakdown Structures (WBS), activities, calendars, and activity codes.
- Develop logic-driven schedules using CPM scheduling principles and relationship types.
- Apply constraints, analyze float, identify critical paths, and perform advanced scheduling techniques.
- Create and manage roles, resources, resource teams, and role teams.
- Analyze resource utilization, manage resource allocations, and perform resource leveling.
- Optimize project schedules and resolve resource conflicts.
- Create, assign, and manage project baselines.
- Update project progress using actuals, progress methods, and timesheets.
- Perform schedule variance analysis and earned value analysis (EVA).
- Create and manage dashboards, portfolios, and executive reporting views.

- Conduct portfolio analysis, capacity planning, and project prioritization.
  - Manage project risks, risk response plans, thresholds, and project issues.
  - Apply duration types and percent complete methods appropriately in different project scenarios.
  - Manage multiple projects and shared resource environments.
  - Prepare for and successfully attempt the Oracle Primavera P6 Enterprise Project Portfolio Management Professional (1Z0-1129) certification exam.
- 

## **Part 01: Primavera P6 EPPM Fundamentals**

### **Lesson 1: Project Management Life Cycle**

- Project Management Definitions
- Project Management Life Cycle
- Project Process Groups

### **Lesson 2: Understanding Data in P6**

- P6 EPPM and P6
- Team Member Interfaces
- Enterprise Project Structure (EPS)
- Benefits of the EPS
- Organizational Breakdown Structure (OBS)
- Enterprise Data and Project-Specific Data

### **Lesson 3: Overview and Navigation**

- Navigating P6 - P6 Sections
- Overview: Overview and Navigation
- Logging In and Using the P6 Title Bar and P6 Help
- Using the P6 Navigation Bar
- Opening a Project
- Context Menu
- Overview: Navigating the Projects Section
- Projects Navigation Bar
- Viewing the Activities Page and Selecting an Activity View
- Activity Table and Gantt Chart
- Activity and WBS Detail Windows

#### **Lesson 4: Creating a Project**

- Creating a New Project
- Creating a Project from a Template
- Overview: Editing Project Details
- General Detail Window
- Notebook Detail Window

#### **Lesson 5: Creating a Work Breakdown Structure**

- Creating a WBS
- Adding a Child WBS Element
- Specifying a WBS Code
- Adding a Sibling WBS Element
- Adding a WBS Using a Keyboard Shortcut
- Cutting and Pasting a WBS Element

#### **Lesson 6: Adding Activities**

- Activities and Activity Components
- Activity Type - Start and Finish Milestone
- Task Dependent and Resource Dependent
- How Activity Type Affects Dates
- Level of Effort and WBS Summary
- Activity Codes
- Adding Activities
- Copying and Pasting Activities
- Deleting Activities
- Importing Spreadsheets to Add Activities
- Using Steps and Notebooks
- Using Activity Codes
- Adding Activity Code Values

#### **Lesson 7: Calendars**

- Available Calendars
- Resource Calendars
- Work Time Types
- Calendars and Activity Types

- Viewing Calendars
- Viewing a Global Calendar
- Editing a Project Calendar
- Setting Exceptions
- Setting Nonwork Exceptions
- Assigning a Calendar to an Activity

### **Lesson 8: Creating Relationships**

- Network Logic Diagram
- Precedence Diagramming Method (PDM)
- Relationship Types
- Relationships with Lag

### **Lesson 9: Scheduling**

- Critical Path Method Scheduling
- Critical Path and Data Date
- Forward Pass and Backward Pass
- Total Float and Types of Total Float
- Must Finish By Date
- Backward Pass with Required Finish
- Open Ends
- Scheduling a Project
- Using Schedule Check Report
- Viewing the Scheduled Finish Date

### **Lesson 10: Assigning Constraints**

- Constraints
- Must Finish By
- Start On or After
- Additional Start Constraints
- Additional Finish Constraints
- Additional Constraints
- How Constraints Affect Activity Dates
- Adding a Project-Level Constraint
- Viewing Total Float

- Adding an Activity-Level Constraint

### **Lesson 11: Customizing Activity Views**

- Activity Views
- Grouping, Sorting, Filtering
- Saving a Copy of an Activity View
- Columns Tab, Sorting Tab, Grouping Tab
- Filtering Tab, Bars Tab, Gantt Tab
- Viewing the Gantt Chart and Changing the Timescale
- Quick Method to Arrange Columns and Sort Data

### **Lesson 12: Understanding Roles and Resources**

- Roles and Resources
- Resource Details
- Relationship Between Roles and Resources
- Resource Types
- Viewing Resources
- Viewing Unit and Price Information
- Viewing Resource Teams
- Viewing Roles
- Viewing Price and Limit Information for Roles
- Viewing Role Teams

### **Lesson 13: Assigning Roles and Resources**

- Steps for Resource Management
- Viewing the Assignments Detail Window
- Assigning Resources to an Activity
- Assigning a Role to an Activity
- Designating a Primary Resource

### **Lesson 14: Optimizing the Project Plan**

- Project Constraints
- Optimizing the Project Plan
- Analyzing Schedule Dates
- Shortening the Project
- Analyzing Resource Allocation

- Analyzing the Budget
- Importing and Exporting Projects
- Comparing Scheduled Finish to Must Finish By Date
- Focusing on Critical Activities
- Refining Activity Durations and Modifying Relationships
- Modifying Constraints
- Importing and Exporting Projects

### **Lesson 15: Baselineing the Project Plan**

- What is a Baseline?
- Baseline Types
- Opening a Project Exclusively
- Creating Baselines
- Assigning Baselines
- Displaying Baseline Bars
- Converting a Project to a Baseline
- Restoring Baselines

### **Lesson 16: Methods of Applying Progress**

- Preparing the Project for Updating
- Scheduling the Initial Project Plan
- Data Date and Critical Path
- Creating Baselines
- Maintaining Baselines
- Updating a Project
- Factors in Selecting an Updating Method
- Spectrum of Updating Methods
- Using Auto Compute Actuals
- Link Percent Complete With Actuals
- Using Link Percent Complete With Actuals
- Manually Update Activities, Expenses, and Resources
- Options for Manually Updating
- Timesheets/Team Member Interfaces
- Project Scheduled Services

## **Lesson 17: Executing the Project Plan**

- Updating a Project
- The Updating Process
- Using Progress Spotlight
- Updating Status via Team Member Interfaces
- Stating an Activity to Completion
- Entering Actual Labor Units
- Updating Actual Start and Actual Finish Dates
- Updating a Completed Activity
- Updating a Completed Activity That is Behind Schedule
- Updating Remaining Duration for an Activity in Progress
- Updating Actual Units for an Activity in Progress
- Updating an Activity in Progress that is Behind Schedule
- Suspending an Activity
- Rescheduling the Project
- Assessing the Rescheduled Project

## **Lesson 18: Analyzing the Updated Project**

- Steps for Analyzing the Updated Project
- Shortening the Project
- Analyzing Schedule Dates and Critical Activities
- Comparing Current and Baseline Dates
- Shortening the Schedule
- Reducing Lag on an Activity

## **Lesson 19: Portfolios and Dashboards**

- Dashboards
- Portfolios
- Ways to Create Portfolios
- Filtering Portlet Data
- Displaying a Portlet
- Modifying Portlet Layout
- Viewing the Project Health Portlet
- Viewing the Project Gantt Chart Portlet

- Creating a Dashboard and Managing Dashboards
- Managing Portfolios
- Creating Portfolios Manually
- Creating Portfolios by Filter
- Creating a New Portfolio View
- Displaying an Existing Portfolio View
- Deleting a Portfolio

#### **Lesson 20: Updating the Project Using Timesheets**

- Updating a Project
- Timesheet Approval Process
- Data Date and Applying Actuals
- Viewing Timesheets and Notes
- Approving Timesheets
- Applying Actuals
- Rescheduling the Project

## **Part 2: Primavera P6 EPPM Advanced**

#### **Lesson 21: Creating Resource Teams**

- Resource Teams
- Benefits of Resource Teams
- Creating a Resource Team
- Assigning Team Members
- Viewing Resource Allocation

#### **Lesson 22: Creating Role Teams**

- Role Team
- Creating a Role Team
- Selecting Roles for the Team
- Viewing the Open Requests for Resource Portlet
- Viewing the Unstaffed Roles for a Project

#### **Lesson 23: Managing Allocation**

- Managing Allocation on the Analysis Page

- Using the Analysis Page
- Using the Analysis Page Spreadsheet
- Viewing Cost Data
- Viewing Role Usage
- Overview: Managing Allocation on the Assignments Page
- Viewing the Assignments Page
- Filtering Assignments

#### **Lesson 24: Staffing Resource Requests**

- Resource Search
- Search Results
- Using the Open Requests for Resources Portlet
- Viewing the Resource Staffing Page
- Assigning Resources
- Overview: Resource Search Criteria Page
- Using Resource Search

#### **Lesson 25: Resource Leveling**

- Leveling Overview
- Handling Resource Conflict
- Handling Resource Conflict (Before Resource Leveling)
- Handling Resource Conflict (After Resource Leveling)
- Resource Leveling in P6
- Leveling Rules in P6
- Leveling Priorities
- Leveling is a Tool – Not a Solution
- Viewing Resource Allocation
- Leveling a Resource
- Leveling Based on Activity Priority

#### **Lesson 26: Introduction to Portfolios**

- Portfolios
- User and Global Portfolios
- Manual Portfolios
- Filtered Portfolios

- Overview: Viewing the Portfolios Section
- Overview: Creating Portfolios
- Creating Portfolios Manually
- Creating Portfolios by Filter
- Managing Portfolios

### **Lesson 27: Earned Value Analysis and Portfolio Performance**

- Earned Value Analysis
- Essential Performance Variables
- Earned Value Analysis – Simplified Example
- Planned Value (PV)
- Earned Value (EV)
- Actual Cost (AC)
- Summary of Performance Variables
- Schedule Variance (SV)
- Cost Variance (CV)
- Variance vs. Performance Index
- Schedule Performance Index (SPI)
- Cost Performance Index (CPI)
- Earned Value Graph
- Overview: Viewing Performance Status
- Viewing Performance Thresholds
- Viewing Performance Data
- Viewing WBS and Activity Information

### **Lesson 28: Analyzing Portfolios**

- Analyzing Portfolios
- Bubble Chart
- Waterline Analysis
- Overview: Using the Portfolio Analysis Page
- Viewing Portfolio Data
- Editing a Portfolio View
- Creating a Portfolio View
- Overview: Using the Capacity Planning Page

- Viewing the Capacity Planning Page
- Viewing Role Allocation
- Analyzing Staffed vs. Unstaffed Assignments

### **Lesson 29: Advanced Scheduling**

- Critical Path
- Multiple Float Paths
- Calendar Effect on Lag
- Overview: Using Advanced Scheduling Options
- Setting Multiple Float Path Scheduling Options
- Scheduling Progressed Activities
- Using Retained Logic
- Using Progress Override
- Calendar Effect on Lag
- Assigning Lag to an Activity's Successor
- Scheduling the Project Using the Predecessor Activity Calendar
- Using the Successor Activity Calendar

### **Lesson 30: Managing Multiple Projects**

- Benefits of Using Multiple Projects
- Overview: Managing Multiple Projects
- Opening Dependent Projects
- Grouping Activities by Project
- Scheduling Multiple Projects

### **Lesson 31: Managing Project Risks**

- Risk Enterprise Data
- Risk Categories
- Risk Thresholds
- Risk Scoring Matrices
- Risk User Defined Fields
- Risk Response Planning
- Risk Register
- Overview: Managing Project Risks
- Creating a Risk

- Computing a Risk Score
- Mapping Risks to Activities
- Viewing and Assigning Risks on the Activities Page
- Creating a Risk Response Plan
- Adding Response Actions to a Risk Response Plan
- Adding Thresholds and Costs to Risk Response Actions

### **Lesson 32: Managing Project Issues**

- Issues
- Overview: Managing Project Issues
- Viewing Project Issues
- Creating an Issue
- Grouping Issues

### **Lesson 33: Duration Types**

- Time and Work
- Duration Type
- Choosing a Duration Type
- Recalculating the Time/Work Equation
- Duration Type: Fixed Units/Time
- Duration Type: Fixed Duration and Units/Time
- Duration Type: Fixed Units
- Duration Type: Fixed Duration & Units

### **Lesson 34: Calculating Percent Complete**

- Percent Complete
- Duration Percent Complete
- Units Percent Complete
- Physical Percent Complete
- Weighted Steps