

Welcome to the  
**Eastwood Harris Pty Ltd  
Primavera P6  
Version 7 and Earlier Versions  
3 day training course**

PMI REP No 3001 – Course Number PP6

**Administration**

- Evacuation
- Timings and meals
- Facilities
- Mobile phones & Emails
- Introductions:
  - Your name,
  - The types of projects you are involved in,
  - Your experience in scheduling software and
  - What you seek from this course
- Course attendance sheet.

**Course Agenda**

Day 1 Modules

- Module 1 – Introduction
- Module 2 – Creating a Project Plan
- Module 3 – Starting Up and Navigation
- Module 4 – Creating a New Project
- Module 5 – Defining Calendars
- Module 6 – Creating a Primavera Project WBS
- Module 7 – Adding Activities and Organizing Under the WBS
- Module 8 – Formatting the Display
- Module 9 – Adding Relationships
- Module 10 – Activity Network View
- Module 11 – Constraints

**Course Agenda**

Day 2 Modules

- Module 12 – Filters
- Module 13 – Group, Sort and Layouts
- Module 14 – Printing and Reports
- Module 15 – Tracking Progress
- Module 16 – User and Administration Preferences and Scheduling Options
- Module 17 – Creating Roles and Resources
- Module 18 – Assigning Roles, Resources and Expenses

**Course Agenda**

Day 3 Modules

- Module 19 – Resource Optimization
- Module 20 – Updating a Resourced Schedule
- Module 21 – Other Methods of Organizing Project Data
- Module 22 – Global Change and Utilities
- Module 23 – Managing the Enterprise Environment
- Module 24 – Multiple Project Scheduling
- Module 25 - Utilities

**Module 1 – Introduction**

- Purpose
- Required Background Knowledge
- Purpose of Planning
- Project Planning Metrics
- Planning Cycle
- Levels of Planning
- Monitoring and Controlling a Project

## Enterprise Project Management

- Primavera is an Enterprise Project Management software package that allows many projects to be managed in one database
- These projects may be summarized under a hierarchical structure titled the Enterprise Project Structure (EPS)
- This function is similar to summarizing activities of a project under a Work Breakdown Structure (WBS).

## Understanding Your Project

Before you start the process of creating a project schedule in Primavera, it is important to:

- Develop an understanding of the project and how it will be executed, which should result in the development a project delivery methodology statement
- Create a strong WBS
- Consider conducting a **Stakeholder Analysis**
- Create a detailed project plan, and
- Conduct a **Risk Analysis**.

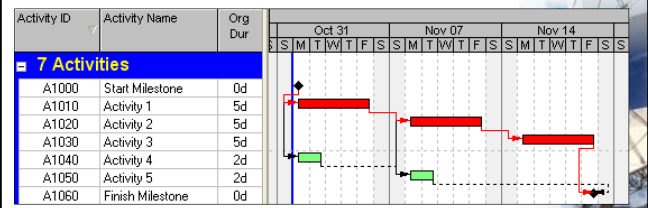
## Level 1 – Planning Without Resources

Topics:

- Create the project
- Define the calendars
- Defining the WBS and other codes
- Add activities
- Add the logic & constraints
  - Mandatory dependencies
  - Discretionary dependencies
  - External dependencies
- Schedule the project and
- Consider contingent time.

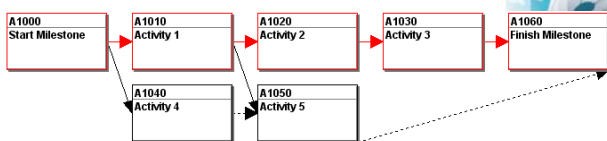
## Schedule Calculations

- When a schedule has a **Closed Network** scheduling the project will identify the:
  - Critical Path(s)
  - Total Float
  - Free Float



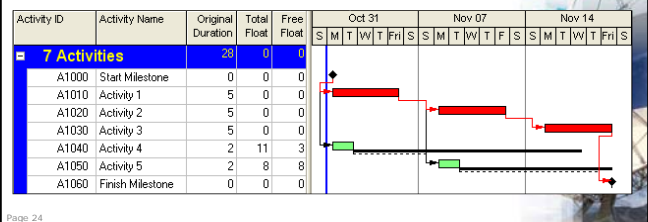
## Closed Network

- In a **Closed Network** every activity, except the project start milestone(s) and finish milestone(s), has one or more:
  - Start Predecessors, and
  - Finish Successors.



## Critical Path(s)

- The Critical Path is the shortest duration that a project may be completed in and a delay to any activity will delay the end date of the project, shown in red below:



## Now lets get our hand dirty!

## Module 3 – Starting Up and Navigation

- Terminology Differences between Industry Versions
- Logging In and the Welcome Form
- The Home Workspace and the Projects Workspace
- Opening One or More Projects and 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
- Workshop 1 – Navigating Around the Workspaces.

## Terminology Differences between Industry Versions

- IT – Originally TeamPlay in Primavera Version 3.5

Activity 01700		Phase One		Project JASSET431	
Duration	41.5d	Status	Started	Physical %	100%
Planned	41.5d	Started	09-Apr-02 08:00 AM	Total Float	
Actual	41.5d	Finished	05-Jun-02 12:18 PM	Free Float	
Remaining	0.0d	Exp Finish		At Complete	0.00d
At Complete	41.5d	Constraints			

- E&C – Originally P3e/c in Primavera Version 3.5

Activity 021000		Bid Request Documents Received		Project RFP1810004 - 16	
Duration	0.00d	Status	Started	Physical %	100%
Planned	0.00d	Started	06-Dec-04	Total Float	
Actual	0.00d	Finished		Free Float	
Remaining	0.00d	Exp Finish		At Complete	0h
At Complete	0.00d	Constraints			

## Starting Up and Navigation

- The instructor will demonstrate the software functions.

## Module 4 – Creating a New Project

Topics:

- 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 Project and EPS Information with Notebook Topics
- Workshop 2 – Creating Your Project.

## Primavera File Types

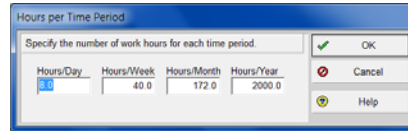
- Primavera data is kept in a Oracle or SQL Database and users are usually unaware of the database format.
- The following Primavera proprietary file formats are available for import and exporting data:
  - XER – Exchange one or more projects between Primavera databases
  - PLF – Exchange Layouts between Primavera databases
  - ANP – Saves the position of activities in an Activity Network
  - ERP – Exchange Reports between Primavera databases regardless of the database
  - PCF – Exchange Global Changes between Primavera databases
  - XML – A new Primavera PM format introduced with Primavera Version 6.0 which is used to import data from the Project Manager module.

### Database Default Calendar, WBS and Project Durations – Version 6.2 & Earlier

- There are some issues that need to be carefully considered when planning and controlling multiple projects with different calendars in one database when the correct durations in days are important,
- Primavera performs best when the all calendars in all the projects are set with the same hours per day,
- If this is not possible you may consider:
  - Showing durations in hours only,
  - Creating a separate database for projects that require a different hours per day,
  - Not displaying the durations against Project nodes, WBS nodes and any other summary nodes by not checking the **Show Group Totals** in the **Group and Sort** form,
  - Create a global change to put the correct duration in a text field.

### Calculation of Activity Duration in Days – Version 7

- In earlier version of P6 the calculation of the durations in hours for all calendars was set either by the Administrator in **Admin, Admin Preferences..., Time Periods** tab or by the User in the **Edit, User Preferences..., Time Units** tab.
- Primavera Version 7 has removed these two options above and has created of a new calendar function for each titled **Hours per Time Period**:



### Calculation of Activity Duration in Days – Version 7

- The picture below has the Project Default calendar set as the 8hr/d & 5d/w and the picture shows that when the calendars are different then the Project Default calendar is used to calculate the summary duration for WBS Nodes, Projects etc:

Activity ID	Calendar	Original Duration	Dec 05	Dec 13
<b>Calendars Durations</b>				
<b>Calendars = Project Default</b>				
A1020	8hr/d & 5d/w	10d	[Gantt chart showing 10 days]	
A1040	8hr/d & 5d/w	7d	[Gantt chart showing 7 days]	
A1050	8hr/d & 5d/w	5d	[Gantt chart showing 5 days]	
<b>Calendars all different</b>				
A1060	7 x 24hr Days	12d	[Gantt chart showing 12 days]	
A1070	8hr/d & 7d/w	12d	[Gantt chart showing 12 days]	
A1080	8hr/d & 5d/w	10d	[Gantt chart showing 10 days]	
<b>Calendars NOT = Project Default</b>				
A1090	7 x 24hr Days	12d	[Gantt chart showing 12 days]	
A1100	7 x 24hr Days	5d	[Gantt chart showing 5 days]	
A1110	7 x 24hr Days	8d	[Gantt chart showing 8 days]	

### Defining Calendars

- The instructor will demonstrate the software functions.

### Module 6 – Creating a Primavera Project WBS

Topics:

- Understanding the 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
- Workshop 4 – Maintaining the Work Breakdown Structure.

### Project Breakdown Structures

- There are two types of Project Breakdown Structures that may be utilised to programme a project:
  - Hierarchical and
  - Matrix
- Either or both may be used in the one programme,
- The predominate method in P3 and SureTrak is the matrix format using Activity Codes,
- The predominate method in Primavera Project Manager is the WBS function and this is a Hierarchical structure.

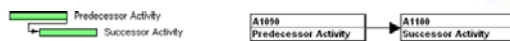
## Leads and Lags

- A Lag is a duration that is applied to a dependency to make the successor start or finish earlier or later,
- The calendar that the lead or lag is calculated on is selected in the **Tools, Schedule, Options** tab,
- This calendar is selected for all activities in a schedule and
- The calendar may be the predecessor's, the successor's, 24 hour or the Project Default calendar.

An example of a FS with positive lag



An example of a FS with negative lag:



## Adding Relationships

- The instructor will demonstrate the software functions.

## Module 10 – Activity Network View

Topics:

- Viewing a Project Using the Activity Network View
- Formatting the Activity Boxes
- Reorganizing the Activity Network
- Saving and Opening Activity network Positions
- Early Date, Late Date and Float Calculations
- Workshop 8 - Scheduling Calculations and Activity Network View.

## Activity Network View

- The instructor will demonstrate the software functions.

## Module 11 – Constraints

Topics:

- Activity Constraints
- Project Constraints
- Activity Notebook
- Workshop 9 – Constraints.

## Activity Constraint Types

Constraints are used to impose logic on activities that may not be realistically scheduled with logic links.

This module will deal with the following constraints in detail:

- **Start On or After** more commonly called an **Early Start constraint** and affects the activities Early Start date,
- **Finish On or Before** more commonly called an **Late Finish constraint** and affects the activities Late Start date,

These are the minimum number of constraints that are required to effectively schedule a project,

There are many other types that may be used:

## Module 15 – Tracking Progress

Topics:

- The process and understanding the date fields
- Schedule Options
- Setting the Baseline
- Practical Methods of Recording Progress
- Understanding the Concepts and Updating the Schedule
- Progress Spotlight
- Suspend and Resume
- Scheduling the Project
- Comparing Progress with Baseline
- Corrective Action
- Workshop 13 – Tracking Progress.

## Tracking Progress Steps

The main steps for monitoring progress are:

- Saving a Baseline schedule,
- Recording or marking-up progress as of a specific date, often titled the Data Date, Status Date, Update Date, Current Date and As-Of-Date,
- Updating or Updating the schedule with Actual Start and Actual Finish dates where applicable, and adjusting the activity's Remaining Durations and Percent Completes,
- Scheduling, moving the Data Date to the new date and recalculating all the activities,
- Comparing and Reporting actual progress against planned progress and revising the plan and schedule, if required.

## Understanding the Date Fields

There are a number of date fields including:

- Early Start and Early Finish
- Late Start and Late Finish
- Actual Start and Finish
- Start and Finish
- Planned Dates
- Remaining Early Start and Finish
- Remaining Late Start and Finish.

## Early Start and Early Finish

- These are always the earliest dates that unstarted activities or the incomplete portions of in-progress activities may start or finish based on calendars, relationships and constraints,
- The Early Start is set to the Data Date after an activity has commenced, NOT to the Actual Start as in many other products,
- The Early Finish is set to the Data Date when the activity is complete, NOT to the Actual Finish.

Activity ID	Activity Name	Early Start	Early Finish	November 2010				December 2010				January 2011					
				25	01	08	15	22	29	06	13	20	27	03	10	17	24
<b>Date field example</b>																	
A1000	A	12-Dec-10	12-Dec-10	[Gantt bar from 12-Dec-10 to 12-Dec-10]													
A1010	B	13-Dec-10	24-Dec-10	[Gantt bar from 13-Dec-10 to 24-Dec-10]													
A1020	C	27-Dec-10	21-Jan-11	[Gantt bar from 27-Dec-10 to 21-Jan-11]													

## Late Start and Late Finish

- The latest dates that **Unstarted** activities or the **Incomplete** portions of in-progress activities may start or finish based on calendars, relationships and constraints,
- Note: The end of the Total Float bar is the same date and time as the Late Finish.

Activity ID	Activity Name	Late Start	Late Finish	November 2010				December 2010				January 2011					
				25	01	08	15	22	29	06	13	20	27	03	10	17	24
<b>Date field example</b>																	
A1000	A	20-Dec-10	20-Dec-10	[Gantt bar from 20-Dec-10 to 20-Dec-10]													
A1010	B	20-Dec-10	31-Dec-10	[Gantt bar from 20-Dec-10 to 31-Dec-10]													
A1020	C	03-Jan-11	26-Jan-11	[Gantt bar from 03-Jan-11 to 26-Jan-11]													

## Actual Start and Finish

- These dates are manually applied, representing when an activity started or finished, and override constraints and relationships. These dates should be set in the past in relation to the **Data Date**,
- **Note:** Actual dates should never change after they are assigned but both the **Apply Actuals** and **Update Progress** functions may change Actual Dates and these functions must be used with extreme caution.

Activity ID	Activity Name	Actual Start	Actual Finish	November 2010				December 2010				January 2011					
				25	01	08	15	22	29	06	13	20	27	03	10	17	24
<b>Date field example</b>																	
A1000	A	01-Nov-10	26-Nov-10	[Gantt bar from 01-Nov-10 to 26-Nov-10]													
A1010	B	29-Nov-10		[Gantt bar from 29-Nov-10 to ...]													
A1020	C			[Gantt bar from ... to ...]													

### Retained Logic and Progress Override

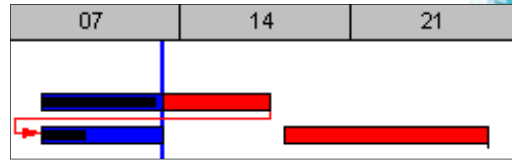
- There are three options for calculating the finish date of the successor when the successor activity has started before the predecessor activity is finished,
- The selected option is applied to all activities in a schedule when it is calculated,
- Open the **Advanced Schedule Options** form by selecting **Tools, Schedule...** and clicking on the button where the options are found under **When scheduling progressed activities use:**

When scheduling progressed activities use

Retained Logic   
  Progress Override   
  Actual Dates

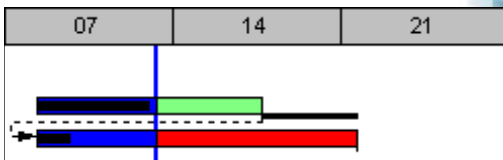
### Retained Logic

- In the example following, the relationship is maintained between the predecessor and successor for the unworked portion of the activity (the Remaining Duration) and continued after the predecessor has finished,
- In the following example the relationship forms part of the critical path and the predecessor has no float:



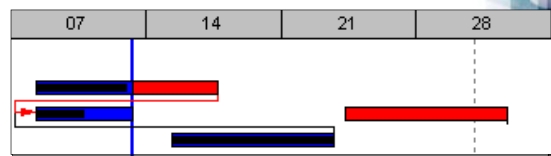
### Progress Override

- In the following example, the Finish-to-Start relationship between the predecessor and successor is disregarded, and the unworked portion of the activity (the Remaining Duration) continues before the predecessor has finished,
- The relationship is not a driving relationship and DOES NOT form part of the critical path in the example following. The predecessor in the following example has float:



### Actual Dates

- This function operates when there is an activity with Actual Start Dates in the future, which is not logical
- With this option the remaining duration of an in-progress activity is calculated after the activity with actuals:
  - Retained Logic
  - Progress Override
  - Actual Dates



### Calculate start-to-start lag from: Scheduling Option

The successor of an activity with a Start-to-Start and positive lag would start after the lag has expired. When the predecessor commences out of sequence the lag may be calculated from the predecessor calculated Early Start or the Actual start,

The Actual Start gives a less conservative schedule:

Activity ID	Activity Name	9	Nov 16	Nov 23	Nov 30	Dec 07	Dec 14
A1000	First Activity	F	S	M	T	W	T
A1010	Second Activity						
A1020	Start to Start + 10d						

The Early Start gives a more conservative schedule:

Activity ID	Activity Name	9	Nov 16	Nov 23	Nov 30	Dec 07	Dec 14
A1000	First Activity	F	S	M	T	W	T
A1010	Second Activity						
A1020	Start to Start + 10d						

### Define critical activities as

- Total Float less than or equal to set to zero

Calendar	Total Float	Jun 01						
		Sun	Mon	Tue	Wed	Thr	Fri	Sat
7 Day/Week	2d							
6 Day/Week	1d							
5d - No Holidays	0d							

- Total Float less than or equal to 1 day or Longest Path would result in the picture below:

Calendar	Total Float	Jun 01						
		Sun	Mon	Tue	Wed	Thr	Fri	Sat
7 Day/Week	2d							
6 Day/Week	1d							
5d - No Holidays	0d							

## Module 18 – Assigning Roles, Resources and Expenses

Topics:

- Understanding Resource Calculations and Terminology
- Project Workspace Resource Preferences
- User Preferences Applicable to Assigning Resources
- Activity Workspace Resource Preferences and Defaults
- Assigning and Removing Roles and Resources
- Expenses
- Suggested Setup for Creating a Resourced Schedule
- Workshop 15 Assigning Roles and Resources to Activities

## Understanding Resource Calculations and Terminology

- A Resource has three principal components after it has been assigned to an Activity:
  - Quantity**, in terms of **Work** in hours or days or **Material** quantities required to complete the activity, which are referred to as **Units** by Primavera,
  - The **Resource Unit Rate** is termed **Price/Unit** in Primavera and
  - Cost**, which is calculated from the **Resource Unit Rate** x **Units**.

- Each Resource and Expense has the same four fields for **Costs and Units: Budget, Remaining, Actual and At Completion**,
- When an activity is Not Started and the % Complete is zero then:
  - Budget** may be linked to **Remaining** and **At Completion** and therefore a change to one will change the other two and they will always be equal, and
  - Actual** will be zero,
- When the activity is marked Started and would normally be In-Progress and the % Complete is between 1% and 99% then:
  - Budget** becomes unlinked from **Remaining** and **At Completion**, and
  - At Completion** = **Actual** + **Remaining** and have a link to % Complete,
- When the activity is Complete and the % Complete is 100% then:
  - Remaining** is set to zero, and
  - At Completion** = **Actual**.

- The Budget values for Costs and Units are linked to the At Completion values until:
  - An Activity has been marked as Started or has a % Complete, or
  - The **Link Budget and At Completion for not started activities** in the **Project Workspace, Calculations** tab is unchecked, see the following picture,
- Note:** This this function also unlinks Original and Remaining Durations:

## Project Workspace Resource Preferences

The **Resources** tab in the Projects Workspace:

- Timesheets**. This sets the defaults for the Timesheet, if it has been implemented,
- Assignment Defaults**. There are five Resource Rates available in Primavera : one rate may be set as a project default. After assignment to an activity, the Resource Rate may be changed using the **Rate Type** field in the Resources tab of the Activities Workspace.

## Project Workspace Resource Preferences

- Drive activity dates by default** allows the Activity Original Duration Resource duration to be unlinked and a resource to be scheduled outside an activity duration, see next slide,
- Resources can be assigned to the same activity more than once** box enables a resource to be assigned to an activity more than once. This is covered in more detail in a later slide.



## Setup for Creating a Resourced Schedule

- The simplest calculation options should be used as a default, and more complex options considered only when there is a specific scheduling requirement,
- It is important to set all the parameters before the activities are added otherwise a lot of time is wasted changing parameters on a number of activities:
  - Set the **Units/Time** format in the **User Preferences, Time Units** tab,
  - Set the **Resource Assignments** option in the **User Preferences form Calculations** tab,
  - Set the default **Activity Type** in the **Project Workspace, Defaults** tab,
  - Set the default **Duration Type** in the **Project Workspace, Defaults** tab,
  - Set the default **Percent Complete Type** in the **Project Workspace, Defaults** tab,
  - Set the default **Resource Assignment Defaults** in the **Project Workspace, Resource** tab.

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## Assigning Roles, Resources and Expenses

- The instructor will demonstrate the software functions.

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## Module 19 – Resource Optimization

Topics:

- Reviewing Resource Loading
- Editing the Resource Usage Spreadsheet
- Methods of Resolving Resource Peaks and Conflicts
- Resource Levelling
- Resource Levelling Function
- Levelling Examples
- Resource Shifts
- Guidelines for Levelling
- What to Look For if Resources Are Not Levelling
- Resource Curves
- Workshop 16 – Resource Optimization.

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## Why Optimise Resources

The schedule may be resource optimized to:

- Reduce peaks and smooth the resource requirements, thus reducing the mobilization and demobilization costs, or to reduce the demand for site facilities, or
- Reduce resource demand to the available number of resources, or
- Reduce demand to an available cash flow when a project is financed on income.

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## Methods of Resolving Resource Peaks and Conflicts

- Revising the Project Plan,
- Duration Change,
- Resource Substitution,
- Increase Working Time,
- Split an activity around peaks in demand,
- Levelling the schedule,
- Resource Curves, or
- Manually Editing the Resource Spreadsheet may assist in some instances.

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## Methods of Resource Leveling

- Turning off Automatic Calculation and Dragging Activities,
- Constraining Activities,
- Sequencing Logic, or
- Leveling Primavera function:
  - The Resource Leveling function enables the optimization of resource use by delaying activities until resources become available, thus reducing the peaks in resource requirements.
  - The leveling function should be used by novices with extreme caution.

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## Project Workspace Calculations Tab Resource Assignments Section

- When updating Actual Units or Costs. There are two options:
  - Add Actual to Remaining.** When Actual Costs are entered, the At Completion increases by the amount of the Actual Costs.
  - Subtract Actual from At Completion.** When Actual Costs are entered, the At Complete does not change and the To Complete is reduced by the value of the Actual.
- Recalculate Actual Units and Cost when duration % complete changes.** This option links the % Complete of Duration Type activities to the Actual and To Complete, thus an increase in % Complete will increase the Actual and decrease the To Complete values.

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## Project Workspace Calculations Tab Resource Assignments Section

- Update units when costs change on resource assignments.**
  - With this option checked a change in Costs will recalculate the Units.
  - With this option unchecked, a change in costs may be made independently of units after units have been changed.
- Link Actual and Actual This Period Units and Cost.** With this option checked, when you enter an Actual this period, the Actual to date will be calculated by increasing the original value by the value of the Actual this period.
- Alternatively, you may enter the Actual to date and Primavera will calculate the Actual this period. When unchecked, the two fields are unlinked and you may enter any figure in each field. This option is grayed out if the project is not open and is used to fix errors in data entry when Period Actuals are being recorded.

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## Percent Complete Types

- The default is adopted from the setting in the Defaults tab in the Projects Workspace,
  - Physical
  - Duration
  - Units
- Physical % Complete must be used when Steps are being used to record progress,
- Units % Complete becomes active once resources are assigned.

Activity ID	Activity Name	Percent Complete Type	Activity % Complete	Physical % Complete	Duration % Complete	Units % Complete
AA1000	% Complete Physical	Physical	50%	50%	0%	0%
AA1010	% Complete Duration	Duration	50%	0%	50%	0%
AA1020	% Complete Type Units	Units	50%	0%	0%	50%

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## Using Steps to Calculate Activity Percent Complete

- An activity percent complete may be defined by using steps. A Step is a measurable or identifiable task required to complete an activity,
  - A Step template may be created by selecting Enterprise, Activity Step Template.... to open the Activity Step Templates form,
  - Check the Activity percent complete based on steps check box in the Projects Workspace, Calculations tab,
  - Select the Physical in the % Complete Type for each activity that is to be measured by steps in the General tab of Activity Workspace,
  - Select the Steps tab in the Activity Workspace to use Steps:

Step Name	% Complete	Step Weight	Step Weight Percent	Completed
Specify Document Composition	100%	10.0	10.0	<input checked="" type="checkbox"/>
Document First Draft	100%	40.0	40.0	<input checked="" type="checkbox"/>
Final Draft and Internal Approval	0%	25.0	25.0	<input type="checkbox"/>
Client Approval	0%	25.0	25.0	<input type="checkbox"/>

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## Preferences, Defaults and Options for Updating a Project

- The following options to be considered and checked before updating a schedule:
  - % Complete Type,
  - Activity Type,
  - Project Workspace Calculations tab,
  - Duration Type,
  - Timesheets,
  - Resources Cost Calculation,
  - Resource Workspace Details Tab,
  - Advanced Schedule Options and
  - Steps.

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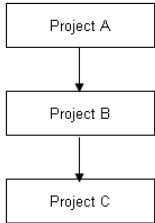
## Updating Resources

- There are many permutations available for calculating resource data,
- Due to the number of options available in Primavera, it is not feasible to document all the combinations available for resource calculation,
- Resource units and costs may be updated by either:
  - Estimating Progress Automatically, a process titled Applying Actuals, or
  - Entering the data using the Resource tab in the Activities Workspace, or
  - Entering the data using the right section of the General tab in the Activities Workspace.

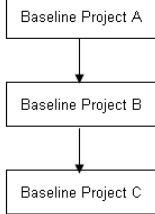
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## Multiple Project Baseline

Original Project relationships



Relationships amongst projects when Baselined using "Convert another project to a new baseline of the current project"



## Multiple Project Scheduling

- The instructor will demonstrate the software functions.

## Module 25 - Utilities

- Reflection Projects
- Advanced Scheduling Options
- Audit Trail Columns
- Excel Import and Export Tool
- Project Import and Export
- Check In and Check Out.

## Utilities

- The instructor will demonstrate the software functions.

## Review Expectations

- Complete Feedback Sheet
- Have we met your expectations?

Thank you for attending