


EASTWOOD HARRIS

PROJECT PLANNING AND CONTROL USING PRIMAVERA CONTRACTOR VERSION 6.1

Including Versions 4.1, 5.0 and 6.1



PAUL E. HARRIS

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Welcome to the Eastwood Harris Pty Ltd Primavera Contractor Version 6.1 user training course



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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.



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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

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 and Resources
- Module 18 – Assigning Resources and Expenses
- Module 19 – Resource Optimization
- Module 20 – Statusing a Resourced Schedule
- Module 21 – Other Methods of Organizing Project Data
- Module 22 – Utilities




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Module 1 – Introduction

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



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Purpose of the course

- Provide a method for planning, scheduling and controlling projects using Primavera Contractor,
- Up to an intermediate level.



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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.

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Schedule Calculations

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

Activity ID	Activity Name	Org Dur	Oct 31					Nov 07					Nov 14											
			S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	
7 Activities																								
A1000	Start Milestone	0d																						
A1010	Activity 1	5d																						
A1020	Activity 2	5d																						
A1030	Activity 3	5d																						
A1040	Activity 4	2d																						
A1050	Activity 5	2d																						
A1060	Finish Milestone	0d																						

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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.

```

    graph LR
      A1000[Start Milestone] --> A1010[Activity 1]
      A1010 --> A1020[Activity 2]
      A1010 --> A1040[Activity 4]
      A1020 --> A1030[Activity 3]
      A1040 --> A1050[Activity 5]
      A1030 --> A1060[Finish Milestone]
      A1050 --> A1060
  
```

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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:

Activity ID	Activity Name	Original Duration	Total Float	Free Float	Oct 31					Nov 07					Nov 14										
					S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
7 Activities																									
A1000	Start Milestone	0	0	0																					
A1010	Activity 1	5	0	0																					
A1020	Activity 2	5	0	0																					
A1030	Activity 3	5	0	0																					
A1040	Activity 4	2	11	3																					
A1050	Activity 5	2	8	8																					
A1060	Finish Milestone	0	0	0																					

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Total Float

- The Total Float is the amount of time an activity may be delayed without delaying the end of a project.
 - An activity with Total Float may delay another activity,
 - May be displayed in a column and in the Gantt Chart, as per the thin black bar below and
 - May be negative.

Activity ID	Activity Name	Org Dur	Total Float	Oct 31					Nov 07					Nov 14										
				S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
7 Activities																								
A1000	Start Milestone	0d	0d																					
A1010	Activity 1	5d	0d																					
A1020	Activity 2	5d	0d																					
A1030	Activity 3	5d	0d																					
A1040	Activity 4	2d	11d																					
A1050	Activity 5	2d	8d																					
A1060	Finish Milestone	0d	0d																					

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Free Float

- The Free Float is the amount of time an activity may be delayed without delaying another activity.
 - Displayed only in a column and
 - Is never in the negative.


Activity ID	Activity Name	Org Dur	Total Float	Free Float	Oct 31					Nov 07					Nov 14										
					S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
7 Activities																									
A1000	Start Milestone	0d	0d	0d																					
A1010	Activity 1	5d	0d	0d																					
A1020	Activity 2	5d	0d	0d																					
A1030	Activity 3	5d	0d	0d																					
A1040	Activity 4	2d	11d	3d																					
A1050	Activity 5	2d	8d	8d																					
A1060	Finish Milestone	0d	0d	0d																					

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Starting Up and Navigation

- The instructor will demonstrate the software functions.



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Module 4 – Creating a New Project

Topics:

- File Types
- Creating a Blank Project
- Setting Up a New Project
- Importing a Project
- Copy an Existing Project
- Project Dates
- Deleting a project
- Saving Project with Notebook Topics
- Workshop 2 – Creating Your Project.




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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 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
 - XML – A new Primavera PM format introduced with Primavera Version 6.0 which is used to import data from the Project Manager module.



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Other File Types Primavera Contractor 6.1

- **Project (*.mpp)**. This is the default file format that Microsoft Project uses to create and save files. Microsoft Project 2007 is a different format to the 2000 – 2003 format, which is different to 98 format
- **Note:** Primavera 6.0 and 6.1 will not import any mpp file when Microsoft Project 2007 is installed as MSP 2007 disables this function

Primavera 6.0 and 6.1 will import or export to the following file types:

- **Project 2000 - 2003 (*.mpp)**
- **Microsoft Project 98 (*.mpp)**
- **MPX (*.mpx)**. This is a text format data file created by Microsoft Project 98 and earlier versions
- Microsoft Project formats such as **Project Database (*.mpd)**, **Microsoft Access Database (*.mdb)** and **(*mpt)** can be imported, however Microsoft Project is required to be installed on the computer.
- Primavera Project Planner **P3** and **SureTrak files** saved in P3 format. A SureTrak project in SureTrak format should be saved in Concentric (P3) format before importing.
- **XLS**. Primavera Version 5.0 has a new function allowing the import and export of data in Excel format.




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Creating a New Project

- There are two methods of creating a new project
 - Using the New Project Wizard, or
 - Copying another project
- The New Project Wizard does not allow the establishment of standard defaults for new projects, so you may find it is best to create a template project as an EXR file with all the options set and import this project thus establishing a standard options for all new projects.




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Creating a New Project

- The instructor will demonstrate the software functions.



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Project Breakdown Structures

The main purposes of the Primavera WBS function are:

- **Earned Value** calculations and Project Performance may be performed at this level,
- **Progress at the WBS** level may be measured with the use of WBS Milestones,
- **Anticipated Dates** may be assigned at the WBS level to provide a bar when no activities have been added to a WBS Node,
- The **Tracking Workspace** operates down to WBS Node level,
- There are a number **Standard Reports** that function at WBS Node level.

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Simple Examples of WBS Structures

- The WBS for three buildings on one site may look like the pictures below:
- In which situations would each example be applicable?

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Creating a Primavera Project WBS

- **The instructor will demonstrate the software functions.**

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Module 7 – Adding Activities and Organizing Under the WBS

Topics:

- New Activity Defaults and Adding New Activities
- Default Activity Duration
- Copying Activities in Primavera and 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
- Workshop 5 – Adding Activities.

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Activity Definition

- Activities should be well-defined, measurable pieces of work with a measurable outcome. Activity descriptions containing only nouns such as “Bid Document” have confusing meanings,
- The limit for activity names is 120 characters, but try to keep activity descriptions meaningful yet short and concise so they are easier to print,
- When activities are created, they are normally organised under the WBS,
- They may also be organized under other coding structures such as Activity Codes or User Defined Fields.

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Adding Activities and Organizing Under the WBS

- **The instructor will demonstrate the software functions.**

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Activity Constraint Types Continued

Other Constraint Types continued:

- **Mandatory Start** sets the Early and Late Start dates and prevents float from travelling through the constraint,
- **Mandatory Finish** sets the Early and Late Finish dates and prevents float from travelling through the constraint,
- **Expected Finish** calculates the Remaining Duration of an activity and requires the check box in the Scheduling Options form to be checked before it operates,
- **As Late as Possible** consumes Free Float and sets the Early and Late date to be as late as possible but without delaying successor activities and does not develop Total Float.

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Constraints

- **The instructor will demonstrate the software functions.**

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Module 12 – Filters

Topics:

- Understanding Filters
- Applying a Filter
- Creating a New Filter
- Modifying a Filter
- Workshop 10 – Filters.

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Filters

- **Filters** reduce the number of activities that are displayed based on a user defined criteria,
- They may be used for working of specific sections of a project or providing reports on specific subject areas
- Primavera does not have:
 - Drop down filters, or
 - Interactive filters, or
 - Project filters, but a Layout filter may be created and associated with a Project Layout.

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Filters

- **The instructor will demonstrate the software functions.**

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Module 13 – Group, Sort and Layouts

Topics:

- Group and Sort Activities
- Understanding Layouts
- Copying a Layout To and From Another Database
- Workshop 11 - Organizing Your Data.

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Planned Dates

- The Planned Dates are very complex and their calculation method is outlined in the book, in summary:
- When an activity is **Complete** or **In-progress** they match the status of the schedule before the last update,
- When an activity has Not Started they match the Early Start and Early Finish.

Activity ID	Activity Name	Planned Start	Planned Finish
Date field example			
A1000	A	01-Nov-10	26-Nov-10
A1010	B	29-Nov-10	24-Dec-10
A1020	C	31-Dec-10	27-Jan-11

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Planned Dates Issues

- The Planned Dates are dates that most schedulers would not want displayed,
- These dates are displayed as the Project Baseline bars and Primary User Baseline bars when no baseline has been assigned,
- These dates are used by the **Apply Actuals** function, but only when tasks are set to **Auto Compute Actuals**, and **Update Progress** function.

Activity ID	Activity Name	Planned Start	Planned Finish
Date field example			
A1000	A	01-Nov-10	26-Nov-10
A1010	B	29-Nov-10	24-Dec-10
A1020	C	31-Dec-10	27-Jan-11

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Remaining Early Start and Finish

- These are the earliest dates that the incomplete portions of unstarted or in-progress activities may start and finish,
- They are blank when an activity is complete,
- They may be edited in the same way as Planned Dates.

Activity ID	Activity Name	Remaining Early Start	Remaining Early Finish
Date field example			
A1000	A		
A1010	B	13-Dec-10	30-Dec-10
A1020	C	31-Dec-10	27-Jan-11

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Remaining Late Start and Finish

- These are the latest dates that the incomplete portions of activities may start and finish,
- They are blank when an activity is complete and may not be edited,
- They may not be displayed as a bar,
- They are set to equal the **Late Dates**.

Activity ID	Activity Name	Remaining Late Start	Remaining Late Finish
Date field example			
A1000	A		
A1010	B	21-Dec-10	07-Jan-11
A1020	C	10-Jan-11	04-Feb-11

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Scheduling Options

- The Schedule Options General form has a number of options that need to be understood when progressing a schedule,
- We will look at some now and the rest in the next module.

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Ignore relationships to and from other projects

- Check this to ignore relationships with other projects that have been imported and are represented by External Early Start and External Late Finish dates,
- The Negative Float in the picture below is created by the External Dates:

External Early Start	External Late Finish	2010
		Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
01-Sep-10	12	
	28-May-10	08

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Tracking Progress

- The instructor will demonstrate the software functions.

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Module 16 - User and Administration Preferences and Scheduling Options

Topics:

- User Preferences
- Admin Menu
- Admin Preferences
- Admin Categories.

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User and Administration Preferences and Scheduling Options

- The instructor will demonstrate the software functions.

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Module 17 - Creating Resources

Topics:

- Understanding Resources
- Creating Resources and the Resources Workspace
- Editing Resource Calendars
- Workshop 14 - Adding Roles and Resources.

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Understanding and Resources

- Traditionally, planning and scheduling software defines a **Resource** as something or someone that is required to complete the activity and sometimes has limited availability. This includes people or groups of people, materials, equipment and money,
- Primavera Contractor does not support Roles as Primavera PM 6.2.

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Understanding and Roles and Resources

The following steps should be followed to create and use resources in a Primavera schedule:

- Create the resources in the **Resource Workspace**,
- Manipulate the Resource Calendars if resources have special timing requirements,
- Assign resources to Activities and review the resource loading.

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Activity Resource Preferences and Defaults

- The **Status** form has a section titled **Labor Units** at the right side as seen in the following picture. The drop down menu enables you to select which data is to be displayed in this section of the form,
- It is possible to enter a **Labor Unit** value in the **Status** tab and not assign a resource. When a resource is assigned the resource will adopt this value in the **Status** tab,
- Note:** When there is no resource assigned the Labour Cost is calculated from the **Project Workspace, Calculations** tab **Activities Default Price / Unit for activities without resource or role Price / Units.**

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Activity Type

The following task types are available:

- Task Dependent** – ignores resource calendars,
- Resource Dependent** – like P3 and SureTrak Independent Activities but acknowledges the Activity Calendar for the start of a task,
- Level of Effort (LOE)** – similar to P3 and SureTrak Hammocks but may also span from the finish of one task to the start of another and span a gap,
- Start Milestone** – scheduled at the start of a work period and has a start date and time and no finish date and time,
- Finish Milestone** – scheduled at the finish of a work period and has a finish date and time and no start date and time,
- WBS Summary Activity** – spans all other activities with the same or lower level WBS code, the same as a P3 and SureTrak WBS Summary Activity.

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Duration Type

- The **Duration Type** becomes effective after a resource has been assigned to an activity,
- The **Duration Type** is set in the **Defaults** tab in the **Projects Workspace** and all new activities are assigned this Duration Type,
- The **Duration Type** for each new activity may be changed in the **General** tab in the **Activities Workspace** or by displaying the **Duration Type** column,
- Note:** The Duration Type works in conjunction with the **Edit, User Preferences, Calculations, Resource Assignments** option.

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Assigning a Resource to an Activity More Than Once

- The option in the **Projects Properties, Resources** tab enables a resource to be assigned more than once to an activity,
- A resource could be assigned to work at the start of an activity and then in conjunction with **Resource Lag** work again at the end of an activity,
- This could be used for a crane to be available for the first and last day of a task.

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Activity Durations

- An Activity Duration is adopted from the longest Resource Duration,
- When more than one Resource has been assigned to an activity with different Units and/or Units/Time, the Resources may have different durations,
- In the following example the Activity Duration is 10 days, which is calculated from David William's **Resource Original Duration** of 10 days:

Role ID	Resource ID Name	Original Lag	Original Duration	Remaining Units	Remaining Units / Time
Qz SE	ARL Angela Lowe	0d	5d	40.00h	100%
Qz BM	DTW David Williams	0d	10d	40.00h	50%
Qz CS	MAY Melinda Young	0d	5d	40.00h	100%

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Resource Lag

- A Resource may be assigned a Lag, the duration from the start of the activity to the point at which the Resource commences work,
- In the following example the Activity Duration is 12 days, which is calculated from Angela Lowe's **Resource Original Lag** of 7 days and **Resource Original Duration** of 5 days:

Role ID	Resource ID Name	Original Lag	Original Duration	Remaining Units	Remaining Units / Time
Qz SE	ARL Angela Lowe	7d	5d	40.00h	100%
Qz BM	DTW David Williams	0d	10d	40.00h	50%
Qz CS	MAY Melinda Young	0d	5d	40.00h	100%

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Cost and Units Budget Values

- The Budget Values in Primavera are assigned to both Units and Costs for each Resource and Expense at the time the Resource or Expense is assigned to an Activity,
- Budget Values reside in the current project and in all Baseline Projects,
- The Budget values may be linked to the At Completion values when an activity has not commenced but after the activity is in-progress by being marked as Started or having a % Complete these values become unlinked.

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Baseline Project and Values

- A Baseline project is a complete copy of a project including the relationships, resource assignments and expenses,
- The Baseline values are values against which project progress is measured. All these values may be read by and compared with the current project values and show variances from the original plan,
- A Baseline would normally be created prior to statusing a project for the first time and
- The Primavera Variance columns use Baseline data from Baseline Projects to calculate variances.

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Understanding the Current Data Date

- The **Current Data Date** is the date that divides the past from the future in the schedule. It is not normally in the future but is often in the recent past due to the time it may take to collect the information required to status the schedule,
- **Actual Costs** and **Quantities/Hours** or **Actual Work** occur before the data date,
- **Costs** and **Quantities/Hours to Complete** or **Work to Complete** are scheduled after the Data Date.,
- **Actual Duration** is calculated from the **Actual Start** to the **Current Data Date**,
- **Remaining Duration** is the duration required to complete an activity. It is calculated forward from the **Current Data Date** and the Early Finish date or an in-progress activity is calculated from the **Current Data Date**.

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Information Required to Update a Resourced Schedule

- **Activities completed in the update period:**
 - **Actual Start** date of the activity,
 - **Actual Finish** date of the activity,
 - **Actual Costs** and **Quantities** (Units) consumed or spent on **Labor Resources**, **Material Resources** and **Expense**. These may be calculated by the software or collected and entered into the software,
- **Activities commenced in the update period:**
 - **Actual Start** date of the activity,
 - **Remaining Duration** or **Expected Finish** date,
 - **Actual Costs** and/or **Actual Quantities**. These may be calculated by the software or collected and entered into the software,
 - **Quantities to Complete** and **Costs to Complete**. These may be calculated by the software or collected and entered into the software,
- **Activities Not Commenced:**
 - Changes in Logic or Constraints, or
 - Changes in Duration, or
 - Changes in estimated **Costs**, **Hours** or **Quantities**.

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Other Considerations

- Primavera may calculate Actual Costs and the Costs to Complete by turning on a relationship between the Units and Resource Units,
- A marked-up copy of the schedule recording the progress of the current schedule is often produced prior to updating the data with Primavera. Ideally, the mark-up should be prepared by a physical inspection of the work or by a person who intimately knows the work, although that is not always possible,
- Often a Statusing Report or mark-up sheet is distributed to the people responsible for marking up the project's progress,
- Other electronic methods, such as the Primavera Timesheet system or an e-mail based system with spreadsheet or pdf attachments, may be employed to collect the data. Irrespective of the method used, the same data needs to be collected,
- It is recommended that only one person update each schedule.

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Project Properties, Calculation tab

- **Default Price/Unit for activities without resource Price/Units.** Covered in the last module,
- **Activity percent complete based on activity steps.** The Primavera **Step** function enables activities to be broken down into elements called Steps. Each element earns a designated % Complete when the Step is marked as complete. Physical % Complete must be selected to use Steps.

Activities

Default Price / Unit for activities without resource Price / Unit

Activity percent complete based on activity steps

Link Budget and At Completion for not started activities

Reset Original Duration and Units to Remaining

Reset Remaining Duration and Units to Original

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Understanding Project Breakdown Structures

WBS **Work Breakdown Structure**, breaks down the project into the elements of work required to deliver a project,

COA **Code of Accounts**, also known as **Cost Breakdown Structure**. Often this contains costs that are not included in a schedule, such as insurances and overheads. The WBS would in this situation represent part of the COA,

OBS **Organization Breakdown Structure**, shows the hierarchical management structure of a project. Primavera has a predefined field for this breakdown structure,

CBS **Contract Breakdown Structure**, shows the breakdown of contracts into elements,

SBS **System Breakdown Structure**, a **System Engineering** method of breaking down a complex system into elements,

PBS **Product Breakdown Structure**, a **PRINCE2** term used for the breakdown of project deliverables under two headings of Project Management and Specialists products.

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Other Methods of Organizing Project Data

- The instructor will demonstrate the software functions.

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Module 22 - Utilities

- Excel Import and Export Tool
- Project Import and Export
- Check In and Check Out
- Send Project
- Claim Digger
- Check Data Integrity.

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Utilities

- The instructor will demonstrate the software functions.

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Review Expectations

- Complete Feedback Sheet
- Have we met your expectations?

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Thank you for attending

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