

# Resource Management in Primavera P6 – 106R

## What you will learn:

Resource Management in P6 Client-Server provides in-depth resource management training in Primavera's client/server-based solution. Building off skills learned in the basic course Project Management in P6 Client-Server (102), this course covers advanced topics in managing resource allocation, future-period bucket planning, and resource leveling. Extended case studies at the end of each day provide an opportunity to apply new skills and functionality.

## Learn to:

- Analyze the effects of resource leveling
- Create a resource report with the Report wizard
- Level a project to resolve resource conflicts
- Compare staffed vs. unstaffed role allocation
- Create a resource via New Resource wizard
- Use the Resource Assignments window to view and edit resource allocation

## Audience:

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

## Prerequisites:

### Suggested Prerequisites:

- Project Management in Primavera P6 Rel 6

## Course Objectives:

- Define resource rates
- Assign cost accounts to resource assignments
- Analyze resource usage using Resource Usage Spreadsheet
- Edit resource allocation
- Assign resource lag and duration to resource assignments

- Track manual curves in the project
- Set resource leveling options
- Store past period performance
- Run a resource report

## **Course Topics:**

### **Creating Resources and Roles**

- Describe resources and roles
- Describe resource security
- Create a resource via New Resource wizard
- Assign resource codes
- Define resource rates
- Create a role
- Add information in Roles dialog box
- View the Resources window

### **Assigning Cost Accounts**

- Assign cost accounts to resource assignments
- Assign cost accounts to expenses

### **Resource and Role Analysis**

- Analyze resource usage using Resource Usage Profile
- Analyze resource usage using Resource Usage Spreadsheet
- Compare staffed vs. unstaffed role allocation

### **Resource Assignments Window**

- Identify sections in the Resource Assignments window
- Use the Resource Assignments window to view and edit resource allocation
- Select data to display in the Resource Usage Spreadsheet

## **Case Study 1: Assigning and Analyzing**

### **Manual Resource Allocation**

- Assign resource lag and duration to resource assignments
- View and assign resource curves to manually spread allocation

## **Bucket Planning**

- View future period bucket planning
- View the implications of committed and non-committed assignments
- Track manual curves in the project

## **Leveling Resources**

- Define resource leveling
- Set resource leveling options
- Level a project to resolve resource conflicts
- Analyze the effects of resource leveling
- Level based on activity and project priorities Course Objectives

## **Storing Period Performance**

- Display financial periods as columns
- Store past period performance

## **Resource Reporting**

- Describe reporting methods
- Run a resource report
- Create a resource report with the Report wizard
- Create a report using the current layout

## **Case Study 2: Resolving Overallocation**