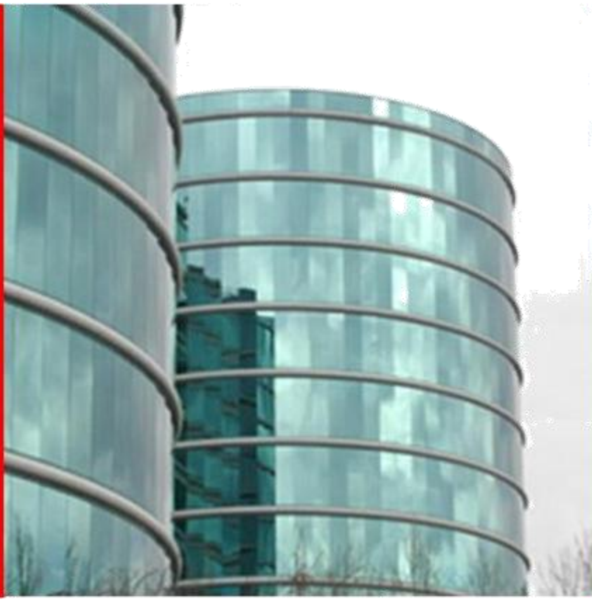

Primavera P6 Enterprise Project Portfolio Management 8 Essentials (1Z0-567) Exam Study Guide

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Margy Girdzius
Director, Partner Enablement
WWA&C

Objective & Audience

Objective

- Help you prepare to take the Primavera P6 Enterprise Project Portfolio Management 8 Essentials (1Z0-567) exam by providing pointers to resources that you can use in your preparation.

Targeted Audience

- Implementation Consultants
- Technical Consultants
- Pre Sales Consultants
- Strong foundation and expertise in implementing Primavera P6 EPPM
- Up-to-date training and field experience are recommended

Exam Topics & Objectives

Exam Topics

The Primavera P6 Enterprise Project Portfolio Management 8 Essentials (1Z0-567) exam consists of the 46 topics.

Each topic has one or more objectives.

Exam Objectives

The exam objectives are defined by learner or practitioner level of knowledge:

- **Learner-level:** questions require the candidate to recall information to determine the correct answer.

  Example: Define the term network.

- **Practitioner-level:** questions require the candidate to derive the correct answer from the application of their knowledge, which can only be attained by extensive experience with the product.

  Example: The client requests xyz functionality, would you recommend a, b or c?

Training Options – OPN Boot Camps

- The Boot Camps are designed as a "jump start" training to enhance your skills by providing role-based training on industry-leading Oracle solutions and services.
- Primavera boot camps have been built to be concise, intensive, and real-time training. Experiencing the OPN Primavera boot camps will give partners a competitive advantage as they prepare to build powerful solutions for their own customer base.
- Primavera boot camps are instructor led training events. Look for schedules on OPN Boot Camps page.
- There are two OPN Boot Camps that support this exam:
  - Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
  - Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Training Options – Oracle University

- Partners can take any publicly-scheduled Oracle University courses at steep discounts.
- Partners will benefit from hands on experience to gain real working skill and work toward Oracle certifications.
- Courses include
  - Primavera P6 Rel 8.0 Fundamentals
  - Managing Portfolios in Primavera P6 Rel 8.0
  - What's New In Primavera P6 Rel 8

Training Options – Guided Learning Paths

- In addition, there are Guided Learning Paths (GLPs) out on OPN Competency Center for Implementation Consultants and for Pre Sales Consultants.
- Note that Pre Sales GLP contains recordings that include positioning, target markets, cross sell up sell, industry specifics, product history and roadmap, etc.
- While these recordings are not required for Implementation Consultants, the Implementation Consultant may find that the recordings may be helpful when working within a specific industry contract.

Topic 1: Introduction to Primavera P6

Objectives	**Level**
• Provide high level overview of Primavera P6 and its role as an Enterprise Project Portfolio Management tool	Learner

Overview

- Must be able to present overview information during Project Kick Off meetings, and during reinforcement meetings with Executive Sponsors
- Must be able to create and deliver reinforcing communications to supporting organizations helping to drive adoption
- Must be able to address organizational resistance issues with information

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #1

Identify two project intense industries where Primavera has significant presence.

a) **Oil and Gas**

b) Communications

c) Health Sciences

d) **Engineering and Construction**

e) Tax

Topic 2: Data and Basic Navigation

Objectives	Level
• Differentiate between enterprise and project specific data	Learner
• Open an existing project	Learner
• Open a view	Learner

Overview

- Have an understanding of the basics of navigation, as well as what data is Enterprise and Project Specific in order to configure the system to satisfy the Customer's business requirements
- Have an understanding of the basics of Enterprise and Project Specific data in order to state business requirements in terms of functionality

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #2

Identify two examples of Enterprise specific data.

a) **Enterprise Project Structure**

b) Activities

c) Baselines

d) Expenses

e) **Resources**

Sample Question #3

Identify two examples of Project specific data.

a) Responsible Manager

b) Risks

c) Dates

d) Cost Accounts

e) Admin Settings

Topic 3: Views

Objectives | **Level**

- Customize a view — Learner

Overview

- Views are one of the most powerful features of Primavera P6 EPPM.
- Implementation Consultant must be fluent in the creation, modification and use of views.
- View will be foundation data for reporting and data entry solutions

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #4

You are coaching a set of new Primavera users that are entering data into an Activity View. They are concerned because they are not able to view Activity Details.

What could be the cause of the problem?

a) They don’t have sufficient security to view Activity Details

b) They have not selected an Activity in the project plan

c) Activity Details have been removed from the plan

d) They are using an EPS View for Activities

Sample Question #5

Your are coaching a Super User at a Customer site that is trying to respond to a specific organization's request to only view data as they do currently in Excel.

Which Activity View functionality should be targeted for a Multi User View for this organization?

a) **Activity Table**

b) Activity Network

c) GANTT Chart

d) Calendar View

Topic 4: Enterprise Project Structure

Objectives	**Level**
• Describe the components that compromise the Enterprise Project Structure	Practitioner
• Discuss the importance of the EPS	Practitioner
• Identify different ways of setting up the EPS given varying business requirements	Practitioner

Overview

- The EPS is the first set of global data to be defined in a typical implementation.
- The Implementation Consultant must be able to understand how to define the EPS with the Customer.
- The Implementation Consultant must define it in such as way as to facilitate the basics of reporting to Management.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #6

Identify the True statement regarding the Enterprise Project Structure.

a) It is defined during installation and cannot be changed

b) It is the default filing system for projects

c) Activities represent the lowest level of the hierarchy

d) It is defined and maintained in the Optional Client

Sample Question #7

What is the significance of assigning the Responsible Manager to an EPS Node?

a) It assigns a generic resource to the EPS

b) It assigns a named resource to the EPS

c) It links the EPS to an OBS element

d) It links the EPS to management reports

Topic 5: Project Details and Defaults

Objectives	**Level**
• Modify Project Details	Practitioner

Overview

- Implementation Consultant must be fully versant in each of the Project Details tabs, and understand the implications of making different selections in Project Details.
- Implementation Consultant must be able to coach on the use of Project Details.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #8

You are a project manager with a project that has not started, and may not start for another year. However, your manager wants you to create a detailed project plan, including estimates of effort by Role, and estimated budgetary estimates created from bottoms up assignments.

You know that the Governance organization has created a series of reports for all Active projects. But the Governance organization also has rules in place that restrict the usage of “Inactive” status.

Which project status would be the best choice to select in Project Details?

a) Active

b) Inactive

c) What If

d) Planned

Sample Question #9

Identify a relevant use case for applying a Must Finish By date to a project.

a) **Compare Scheduled Finish to Must Finish By dates to negotiate realistic Finish dates**

b) Apply Must Finish By dates to shorten the duration of the schedule

c) Apply Must Finish By dates to build case for requesting resources

d) Compare Must Finish By date to Actual Finish Date to negotiate realistic Finish dates

Topic 6: Creating a project

Objectives

- Create a project

Level

Learner

Overview

- Implementation Consultants must be able to coach and mentor Project Teams and Customer's Application Administrators on how to create projects.
- Implementation Consultant will need to work with Customers to develop processes around controlling who can create projects, under what conditions, and what those project plans must have in common in order to create meaningful management reports.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #10

You are coaching a new Primavera user that is attempting to create a project. They navigate to the EPS page. However, they do not see the sub node where the project should be created.

Identify the easiest way for the User to see sub nodes in the EPS page.

a) Obtain security assignments at Read Only to all nodes

b) Click on *View, Expand All* and scroll to locate the sub node

c) Click on each Node and Expand it to the lowest level

d) Click “Add” button, so that all nodes are expanded, and then cancel.

Sample Question #11

Identify the field that must be unique in Primavera.

a) Project Name

b) Project Description

c) Project ID

d) Project Manager

Topic 7: Modifying Project Information

Objectives

- Modify Project Information

Level

Practitioner

Overview

- Implementation Consultants need to have an understanding of how to optimize the use of Project IDs and Project Names.
- This will help the Customer to create standards and guidelines that will facilitate understanding of the data to specific user audiences.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #12

You are coaching a new Primavera Project Manager that is managing a project on a fixed bid contract. As part of this contract, there is a bonus that will be paid if the project comes in on time or ahead of schedule.

Which % Complete Type should be set as the default in this project plan?

a) Physical % Complete

b) Units % Complete

c) Duration % Complete

Sample Question #13

You are coaching a new Primavera Customer that is used to manually entering Physical % complete in Microsoft Project plans. However, they realize that this is very subjective, and that the actual % complete is usually quite far off.

They resort to adding many activities under the main activity that are planned for 1 or 2 hour increments.

What might you suggest to this Customer as an alternative that would give a better indication of % complete, while reducing the number of activities in the project plan?

a) **Use Steps for related action items and select Activity % Complete from Steps**

b) Create WBS elements for each Activity, and create sub activities that roll up % complete

c) Use Fixed Units / Time to ensure that no additional hours can be spent against the activities

d) Use Duration % Complete to lock down dates, and note action items in Notebook Topics

Topic 8: Creating a Work Breakdown Structure

Objectives	**Level**
• Define and create a Work Breakdown Structure	Practitioner

Overview

- An Implementation Consultant must be an expert at creating and modifying Work Breakdown Structures to respond to the myriad of project scenarios that will be discovered at Customer sites.
- An Implementation Consultant will need to be able to create Work Breakdown Structures to be able to respond to the requirements of the organizations affected by a Primavera implementation

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #14

Identify the TRUE statement regarding Work Breakdown Structures (WBS).

a) The WBS is enterprise data

b) Lowest level of WBS is Activity

c) The EPS is top level of the WBS

d) WBS Root level is Project ID and Project Name

Sample Question #15

You are coaching a new Primavera Project Manager that is attempting to add a WBS Child element in their new project plan. The are in an Activity Table. The WBS icon is not available to this user.

What could be the problem?

a) **They have not selected the parent WBS element**

b) They do not have security to add WBS elements

c) They are not the Primary Resource for the Activity

d) They are not listed as the Project Manager for the project

Topic 9: Adding and Editing Activities

Objectives	**Level**
• Add and Edit Activities	Practitioner

Overview

- An Implementation Consultant must be an expert at creating and modifying Work Breakdown Structures to respond to the myriad of project scenarios that will be discovered at Customer sites.
- The Implementation Consultant will need to be able to create Work Breakdown Structures to be able to respond to the requirements of the organizations affected by a Primavera implementation

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #16

You are coaching a new Primavera User. They have opened a project plan, and are attempting to edit activities in an Activity Table view. They are unable to make any changes to any of the activities.

What could be the problem?

a) **They do not have sufficient security in their Project Security Profile**

b) The project plan has been locked by the Project Manager

c) They are not assigned as a resource to any of the activities

d) The Activity View has been modified to prevent editing

Sample Question #17

Identify two methods of adding activities to a project plan.

a) **Press Insert on the keyboard.**

b) Click File / New Activity

c) **Right-click and click *Add Activity***

d) Click File / Add Activity

Topic 10: Creating Relationships

Objectives	**Level**
• Differentiate between the four relationship types	Practitioner
• Create relationships	Learner

Overview

- As part of scheduling and possibly compressing a schedule, an Implementation Consultant needs to be fully versant in the concept of relationships between Activities, as well as the result in the schedule of modifying relationships.
- Customers rarely have an understanding of project planning, apart from the more complicated issue of relationships and scheduling logic.
- They will have a lot of questions regarding relationships and their impacts to project schedules

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #18

You have created a project plan in Primavera. You have estimated durations, and your expectation is that the project will be 6 months duration. You have scheduled the project plan. However, your total duration is only showing 25 days.

How might you fix this problem?

a) **Fix broken logic**

b) Add Constraints

c) Check Durations

d) Summarize Data

Sample Question #19

You are reviewing a project plan with your Project Sponsor. The Project Sponsor has told you that you need to bring in the finish date of this project by 3 months.

You believe that there may be some opportunity to optimize the project plan, but don’t believe that it will be possible to bring it in by 3 months.

Identify two actions that you would suggest to this Sponsor before committing to this new Finish Date.

a) Review the Activities to determine if there are any activities that could use Start / Start relationships

b) Agree on the new date, but raise a schedule Risk with 100% probability and 30 days impact

c) Revise all activity durations and add hard finish constraints to ensure dates don’t move

d) Review the Scheduled Finish Date with the Sponsor to manage expectations

Topic 11: Scheduling

Objectives	**Level**
• Describe float and its impact on a schedule	Practitioner
• Calculate a schedule	Learner

Overview

- The Implementation Consultant needs to be able to go beyond knowledge of the functionality of scheduling.
- They need to be able to use the functionality to identify scheduling issues, and provide suggestions as to fixes for schedules.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #20

Your Customer has called you to complain that all activities in a project plan that has not started are showing “red.” They can’t understand why this is possible.

What is the best response to this inquiry?

a) **Red activities are Critical Path activities, no action is required.**

b) Modify the Planned Start Date for the project and reschedule

c) Modify the Must Finish By Date for the project and reschedule

d) The Actual Start Date has exceeded the Plan Start Date.

Sample Question #21

What is the significance of activities on the Critical Path?

a) **Critical Path activities' duration control the duration of the entire project.**

b) Critical Path activities are the highest Risk activities, and should be completed first.

c) Critical Path activities should be constrained to prevent schedule slippage

d) Critical Path activities should all have Risks assigned for calculating impact

Topic 12: Assigning Constraints

Objectives	**Level**
• Apply an overall deadline to a project	Learner
• Describe the available constraint types	Practitioner
• Apply a constraint to an individual activity	Learner

Overview

- Consultants should clearly warn Customers about the user of constraints.
- If a Consultant has been asked to review a customer’s configurations to determine why schedules are not progressing properly, a good place to begin would be to see if schedules are constrained.
- If so, check the number of constraints that are contained in those schedules

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #22

Identify two TRUE statements regarding the application of constraints.

a) All constraints are justified, and are therefore permitted at project manager's discretion

b) A maximum of two constraints can be assigned to an activity.

c) After applying constraints, the project must be rescheduled to calculate new dates

d) Use of constraints is a best practice for keeping schedule dates intact

Sample Question #23

Identify the best use case for the constraint, “Start On or After.”

a) **Sets the earliest date an activity can begin**

b) Sets the earliest date an activity can finish

c) Sets a deadline on the start date of an activity

d) Forces early dates to be equal to the constraint date

Topic 13: Formatting Schedule Data

Objectives	**Level**
• Group and Sort	Practitioner
• Create and Apply Filters	Practitioner

Overview

- Very often Customer implementations have large schedules and multiple user groups that need to review data in updated schedules.
- It is critical to be able to manipulate schedule data to show only that data that is relevant at any point in time during the project management life cycle.
- Grouping and Sorting, creating filters, and creating views that have a combination of all will be common place.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #24

Identify two TRUE statements regarding Grouping.

a) Modify the EPS without impact to Users

b) Group data to create customized views.

c) View subtotal data in the group title bands

d) Create new locations for assignment of Users

e) Modify colors, fonts and band sizes

Sample Question #25

A new Admin at your Customer calls you with the following issue: A Team is creating a new View. They are using Grouping and Filtering to create a view where only Activities that have started, or are in progress are showing. However, they have now “lost” the view of some of the WBS elements.

What is the problem?

a) The WBS elements have been deleted in error

b) “Hide if Empty” has been selected for Grouping

c) Users do not have sufficient security to view all WBS elements

d) The filter has been created incorrectly and must be modified

Topic14: Roles and Resources

Objectives	**Level**
• View the roles dictionary	Learner
• Differentiate between Roles and Resources	Practitioner
• Identify the differences between labor, non labor and material Resources	Practitioner
• View the resource dictionary	Learner

Overview

- Many Customers have a challenge with Resource Management and Capacity Planning. Planning using Roles is often a solution that can help Customers develop appropriate short and long term hiring plans for mission critical projects, as the demands for Roles can be forecast over time.
- In addition, the use of Rates for Roles and / or Resources can be very beneficial from a Planning and Budgeting perspective using either top down or bottom up estimation processes.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #26

Identify the TRUE statement regarding Resources.

a) Resources are Enterprise data

b) Resources are owned by Projects

c) Resources are Users

d) Resources denote skill proficiencies

Sample Question #27

Identify the TRUE statement regarding Roles.

a) Role proficiency labels can be customized

b) Roles are limited to 5 rates

c) Roles must be used with Resources

d) Roles can be assigned to one Role Team

Topic 15: Assigning Roles

Objectives	**Level**
• Assign Roles to and activity	Leaner
• Assign rates on Roles	Learner

Overview

- Many Customers choose not to implement named Resources in their companies.
- Working with Human Resources, they have interfaces that link back to HR Systems that update the total capacity for all Job Roles.
- The planning for these Roles may either be top down or bottom up.
- Using Roles rather than named resources makes it easier to manage hundreds of resources that may be working on large programs / projects.
- Knowing the total capacity for that Role at any point in time will quickly surface the need to supplement work force – short term or long term, identify staffing Risks, and create contingency plans to meet the demand for Roles and Skills over time.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #28

Identify a business use case for assigning Roles instead of Resources.

a) **Use Roles to estimate skill sets required over time**

b) Use Roles to identify equipment for use in activities

c) Use Roles to estimate expenses for materials in activities

d) Use Roles for integration with HR systems to automate Resource updates

Sample Question #29

You created a project plan 6 months ago and used Roles to estimate hiring plan requirements. The project is starting next week. Your Governance organization requires that named resources are assigned to activities that start within the next 30 days.

What is the best way to accomplish this task?

- a) **Assign Resources to each Role**
- b) Delete Roles, and add Resources
- c) Add Resources, and then delete Roles
- d) Add Named Resources in Notebook Topics

Topic 16: Assigning Resources and Costs

Objectives	Level
• Assign Resources by Role	Learner
• Assign labor, non labor and material Resources to activities	Learner
• Adjust Budgeted Units / Time for a Resource	Learner

Overview

- Assigning Costs to Roles, Resources and Expenses is generally more advanced functionality. Until Project Inventories are stable, and staffing plans within Projects are stable, assigning Costs generally causes a great deal of confusion.
- It is strongly recommended that Project Cost Accounting / Budgeting / Cost Management be put in a roadmap of projects over time, where incremental improvement in these processes is planned.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #30

How are Costs calculated?

a) By assigning Budgets at the Project Level

b) By assigning Resources and Costs in Activities

c) By assigning Resources and Costs at WBS Level

d) By assigning Budgets at the WBS Level

Sample Question #31

Identify the two required components of the calculation to determine Resource costs. (select two)

a) By predefined contracts

b) By the Budgeted Units in Activities

c) By the Price per Unit in Resource profile

d) By Budgeted Units at Project Level

e) By Budgeted Price per Unit at Project Level

Topic 17: Analyzing Resources

Objectives	**Level**
• Display the Team Usage page	Learner
• Format profile and timescale	Practitioner

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Overview

- Project Plans must be balanced to show realistic dates linked to staffing plans in which assigned resources are not critically over allocated.
- This chapter focused on balancing resources manually without the use of Resource Leveling.
- Executing the process manually with Customers will minimize the confusion that will result if Leveling is used.
- Remember - activities in project plans that are resource dependent will have dates that move out depending on the individual projects' defined risk and priority level.
- If Customers are still grappling with schedules, scheduling, schedule management and adoption of standard data update processes, adding Resource Leveling into that mix will more than likely lead an implementation into failure.

Sample Question #32

You are a project manager that has recently modified several activity relationships to be Start to Start. You schedule the project plan, but do not see any changes to the resource allocations.

What do you need to do to see resource allocation changes?

a) Commit Changes

b) Summarize Project Data

c) Reschedule the Project again

d) Modify Activity Relationships

Sample Question #33

You are a Project Manager that has received complaints from project resources that they are over allocated, and therefore dates will be slipping. However, when you go to the Team Usage page, you do not see these over allocations.

What could be the problem?

a) Some projects have inactive status, and therefore over allocations don't show in the profile

b) Some projects have Roles assign, and therefore over allocations don't show in the profile

c) Show current project only has been selected, and therefore over allocations are not showing

d) The Limit Line has not been selected, and therefore over allocations are not showing

Topic 18: Optimizing the Project Plan

Objectives	Level
• Analyze schedule dates	Practitioner
• Shorten a project schedule	Practitioner
• Analyze resource availability	Practitioner
• Analyze project costs	Practitioner

Overview

- The ongoing maintenance of a project plan throughout the project lifecycle will require much ongoing analysis and adjustments after each schedule update cycle.
- Variances, while triggers for this analysis, should be expected as they are normal.
- As variances occur, the implementation consultant will need to coach project managers on best practices for reviewing and analyzing schedules, shortening durations of activities on the critical path, and checking allocations of resources to flag risks that work cannot be completed on time

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #34

You are coaching new project managers in schedule management. Project Managers need to agree upon a project status update process. The culture of the company is to make Planned = Actual. Primavera best practice is to identify and react to variances.

What recommendation would you make to this Customer?

a) **Although the cultural change will be significant, let the true "Actuals" be entered into Primavera to support Primavera best practice.**

b) Given the cultural delta, executives will not respond well to real data. Keep current process intact, and ignore Primavera best practice.

c) Create two project plans – one for management reporting that supports current process, and one that supports Primavera best practice.

d) Create status reports outside of Primavera, to support Executives view of the data and current state process.

Sample Question #35

What is the best way to “crunch” a schedule”?

a) Constrain all Finish dates

b) Modify all durations

c) Modify Critical Path durations

d) Modify effort estimates

Topic 19: Baselining the Project Plan

Objectives	**Level**
• Create and Manage baselines	Learner

Overview

- Project Baselines are snapshots in time of the agreed upon work – dates, duration, efforts, resources, and costs.
- Baselining is a tool to indicate project performance. It shows project managers where projects may be headed for trouble, or are in trouble.
- The Actual data as compared to the project plan is that which allows project performance to be measured.
- Baselining should not be attempted until the best practices of setting up the project plan, reviewing activities, reviewing durations, reviewing relationships, assignment of resources, and estimation of effort / units for those resources over time is completed.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - [Primavera P6 Rel 8.0 Fundamentals]

Sample Question #36

Select the TRUE statement regarding creation of baselines.

a) Baselines do not write data to the project plan

b) Baseline update is assigned to Primary Resource

c) Baseline should be updated as schedules are updated

d) Baselines are used to identify variances

Sample Question #37

You have created a baseline for a project plan. However, it is not showing in the GANTT chart. What is the problem?

a) **You have not assigned the baseline to the project**

b) You have not saved the baseline appropriately

c) You do not have sufficient security to assign baselines

d) Your baseline is completely in alignment to current plan

Topic 20: Project Execution and Control

Objectives	**Level**
• Update the project schedule	Learner
• User Progress Spotlight	Learner
• Status activities	Learner
• Reschedule the project	Learner

Overview

- Once a project has started, a user needs to update actual schedule information and resource usage at regular intervals.
- The company will establish a standard update procedure, including how data is collected and how often it is updated.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Fundamentals Boot Camp
- Oracle University Training - Primavera P6 Rel 8.0 Fundamentals

Sample Question #38

You are working at an Engineering and Construction Customer. Their project plan is 10 years in duration. Activities are generally 30+ days duration. They have multiple sub contractor companies that own portions of the schedule.

How often would you recommend schedules be updated in this scenario?

a) Once a week, because most current data is critical

b) Once a month, because the activity durations are long

c) Once a quarter, so financials can be linked to earnings

d) Once a year, to facilitate schedule import and export

Sample Question #39

Your Customer has a project with 20,000 Activities. They find it difficult to identify which activities should be updated, as it is difficult to see those activities among the 20,000.

Identify two features that could help make this process simpler.

- **a) Apply “Not Started or In Progress” filter**
- b) Filter by Primary Resource
- c) Group and Sort by Primary Resource
- **d) Use Project Spotlight**
- e) Sort by Planned Start Date

Topic 21: Design an Enterprise Project Structure

Objectives

- Design and Maintain and EPS solution

Level

Practitioner

Overview

The Enterprise Project Structure (EPS) forms the hierarchical structure of the database of projects. Each EPS node (or folder) can be subdivided into multiple levels to represent the work that needs to be done in the organization.

The number of levels and their structure depend on the scope of the projects and how the data will be summarized.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #40

In P6 R8, the EPS is now modified in:

a) The Client

b) The Projects Section

c) The Portfolios Section

d) The Administration Section

Sample Question #41

Your Customer is having difficulty coming to a final recommendation as to what the Enterprise Project Structure should be, due to conflicting requirements for views of the data in various organizations.

How should you position a solution for this Customer that will satisfy the basic requirements for the EPS, while retaining the ability to create views that satisfy the data requirements from all organizations? (select two)

a) **Use standard org structure as the default rollup EPS**

b) Create multiple EPS to accommodate different data requirements

c) **Use Project Codes for grouping and sorting in org specific views**

d) Use Functional Groups for managing projects as the EPS

Topic 22: Design an Organizational Breakdown Structure

Objectives	**Level**
• Design and Maintain and Organizational Breakdown Structure	Practitioner

Overview

- The Organizational Breakdown Structure (OBS) is an arrangement of an organization's management structure.
- The OBS is defined globally for the enterprise and controls user access to project information.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #42

Your Customer has a PMO that has voiced a requirement to be able to modify information for each project for purposes of governance and reporting. Specifically, they want to be able to limit access to groups of projects, and then group and sort to create tabular reports.

What Primavera P6 EPPM functionality would address this requirement?

a) Create e-mail groups for reporting to groups of Users.

b) Manage the "Responsible Manager" field at the project level.

c) Manage the "Resource Manager" field to limit access to activities.

d) Modify Global Security Profiles to allow or restrict access to projects.

Sample Question #43

Select the best statement to complete the following sentence. The Organizational Breakdown Structure _____.

a) **is a hierarchical arrangement of an Customer's management structure**

b) is a hierarchical arrangement of projects within the enterprise

c) provides controlled access to all global coding libraries

d) determines each individual's security profile assigned by the System Administrator

Topic 23: Design a Security Solution

Objectives

- Design and Maintain a Security Solution

Level

Practitioner

Overview

- Enterprise project management involves a structured approach to managing several ongoing projects and teams across multiple locations.
- To ensure proper results, up-front planning and coordination by various members of the organization are essential. Before using Primavera to manage projects, an Organizational Breakdown Structure (OBS), Enterprise Project Structure (EPS), and resource hierarchy need to be established. Additionally, users need to be set up with proper access rights.
- Once users and structures are in place, security profiles can be implemented to provide and restrict access to specific project data.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #44

Which of the following components combine to create Security?

a) Projects, Resources, Activities and Calendars

b) Secure Codes, Weighted Codes, Global Codes and User Defined Fields

c) EPS, OBS, Global and Project Security Profiles

d) Admin Preferences, Admin Categories, User Profiles, and Secured Codes

Sample Question #45

Which security profile limits the User's access to enterprise functionality?

a) Project

b) Portfolio

c) Resource

d) Global

Topic 24: Design a User Administration Process

Objectives	Level
• Design and Maintain a User Administration Process	Practitioner

Overview

- Each User can only equal one Resource in Primavera. However, Users do not have to be Resources
- Each User has one (and only one Global Security Profile. However, one Global Security Profile may be assigned to multiple Users.
- Each User may have multiple Project Security Profiles. Each User may be assigned to different OBS elements at different Project Security. Recall that the OBS is linked to the EPS. This relationship provides the user with a combination of a project profile and OBS elements.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #46

Identify two TRUE statements regarding Security Profiles.

a) Each Project Security Profile is assigned to only one User

b) Each User has only one Global Security Profile

c) Each User may have multiple Global Security Profiles

d) Each User has only one Project Security Profile

e) Each Global Security Profile may be assigned to multiple Users

Sample Question #47

Identify the TRUE statement regarding Users and Resources.

a) All Users are Resources by default

b) All Resources are Users by default

c) Users might not be Resources

d) Users must link to Resources

Topic 25: Design the Resource Breakdown Structure

Objectives	Level
• Design and Maintain the Resource Breakdown Structure	Practitioner

Overview

- Use the *Resources* module, and the Administration section, and the Resources tab to maintain both the organization's resource hierarchy and individual resource information. A user can assign resources to activities and Roles in any project. If resource security is enabled, a user can only view resources they have access to.
- In the *Resources* tab, a user can view the resource hierarchy as a table or as a chart, and easily move resources around in the hierarchy.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #48

Executive Management receives monthly reports on resource allocation, and works with HR to create and review hiring plans so that projects are staffed adequately. You are working with Primavera Users that have not been set up as Resources. However, they are doing work on multiple project plans.

Is this a problem? Why?

a) No, because projects will show lower actual costs in reports without Users assigned as Resources

b) Yes, because projects will show over allocation without these Users as Resources

c) Yes, because resource allocation data will be incorrect, and adversely affect staffing / hiring plans

d) No, because Users are automatically set up as Resources assigned to Activities

Sample Question #49

As a consultant, would you recommend setting up an integration to HR systems for maintenance of the Resource Breakdown Structure? Why?

a) No, because Job Titles rarely correspond to Roles

b) No, because skill levels cannot correspond to skills

c) Yes, because resources and organizational changes will be automated

d) Yes, because resource costs / changes will be automated

Topic 26: Design the Roles Dictionary

Objectives	**Level**
• Design and Maintain the Roles Dictionary	Practitioner

Overview

- Roles are project personnel job titles or skills, such as mechanical engineer, inspector, or carpenter. They represent a type of resource with a certain level of proficiency rather than a specific individual.
- Roles can also be assigned to specific resources to further identify that resource's skills. For example, a resource may have a role of a engineer and manager.
- A user can create a set of Roles to assign to resources and activities in all projects in the enterprise.
- A user can establish an unlimited number of Roles and organize them in a hierarchy for easier management and assignment.
- The set of Roles assigned to an activity defines the activity's skill requirements. A user can also define unique price per unit rates for each role for accurate cost planning.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #50

Identify the TRUE statement regarding Roles in Primavera.

a) Roles = Job Titles

b) Roles = Responsibilities

c) Roles = General Skills

d) Roles = Resources

Sample Question #51

You are working with a Customer that wants to differentiate between different levels for Roles.

How is this done in Primavera?

a) Address using Resource hierarchy

b) Create Role Teams

c) Create a Role hierarchy

d) Customize Skills Descriptions

Topic 27: Design the Resource Coding Library

Objectives	Level
• Design and Maintain the Resource Coding Library	Practitioner

Overview

- Use resource codes for grouping and reporting resource information.
- A user can create an unlimited number of resource codes to group, sort, and filter resources in profiles and spreadsheets.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #52

Which business case could be made for
the creation of a Secure Resource Code?

a) Resource Managers' requirements demand restrictions to Resource visibility

b) International HR requirements demand restrictions to Resource pay grades

c) Resource Managers' requirements demand restrictions to resource assignments

d) Financial Managers' requirements demand restrictions to financial performance data

e) Project Managers' requirements demand restrictions to project status visibility.

Sample Question #53

You are a project manager that works with over a hundred subcontractor companies that provide implementation consultants. You need to be able to see which of these companies have consultants that speak Portuguese.

How would you solve this problem? (select two)

a) Create a Resource code category for Languages

b) Create a Resource code category for Portuguese

c) Sort Resources by Languages

d) Create a Resource Team for Portuguese

e) Create a Filter for Languages

Topic 28: Design the Project Coding Library

Objectives	**Level**
• Design and Maintain the Project Coding Library	Practitioner

Overview

- Use project codes for grouping and reporting project information, and for classifying and categorizing projects according to the organizational needs.
- A user can create an unlimited number of project codes.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #54

Select two True statements regarding Project Codes.

a) Use Project Codes for grouping and reporting activity information.

b) Use Project codes for grouping and reporting of Project information.

c) Project Codes may be created and edited by Project Managers.

d) Users create Project Score from weighted Activity Codes.

e) Project Codes are Global and can be used by all projects.

Sample Question #55

You are working at a Customer site with many large portfolios. Within each portfolio, there are projects that absolutely must be completed, even though they may be small effort, duration and cost. Your Customer wants to create some type of scorecard that ranks projects using this new criteria.

What Primavera feature would meet this requirement?

a) Global Project Codes

b) Weighted Project Codes

c) Weighted Cost Codes

d) Global Priority Codes

Topic 29: Design an Activity Coding Library

Objectives	**Level**
• Design and Maintain an Activity Coding Library	Practitioner

Overview

- An activity code is a user-defined attribute that is shared by a group of activities. Codes enable a user to group, filter, sort, and report on large amounts of information.
- A user can create three types of activity codes in Primavera — global-level, EPS-level, and project-level. The activity code type determines where an activity code has been defined and to which activities the activity code values are available.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #56

Select two True statements regarding Activity Codes.

a) **Three types of activity codes are available: Global, EPS, and Project levels.**

b) EPS Activity Codes are available to all projects in the database.

c) **Global Activity codes are available to all projects in the database.**

d) Project Level Activity Codes are assigned at the Project level.

Sample Question #57

Your Customer wants to set up an Activity View that shows only those activities that have supporting deliverables.

Identify two features that would help to meet this requirement.

a) **Set up and assign Project Activity Code for *Deliverable*, with Values of *Yes* or *No***

b) Group and Sort Activities based on Work Products and Documents

c) **Filter Activities by Activity Code for Deliverables = Yes**

d) Group and Sort Activities based on Activity Code for Deliverables = Yes

e) Filter Activities by Work Products and Documents

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Topic 30: Design User-Defined Field Solutions

Objectives	**Level**
• Design and maintain User Defined Fields	Practitioner

Overview

- User-defined fields enable a user to add custom fields to the project database.
- These fields can be used to group, sort, and filter project data within layouts, as well as organize reports for analysis.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #58

Calculated user-defined fields are created: (Select 2)

a) Within Activities

b) By Administrators

c) For added complication

d) In Project Statistics

e) In the Administration menu

Sample Question #59

User Defined Fields______ (Select 3)

a) **Enable Users to add custom fields to the project database**

b) Can be created by anyone with Project access

c) **Assist in the import of MS Project Schedules**

d) **Can have indicators assigned**

e) Are created by Administrators in Admin Categories

Topic 31: Design Calendar Solution

Objectives	**Level**
• Design and maintain a Calendar Solution	Practitioner

Overview

- Calendar assignments are used for scheduling and tracking activities, and for leveling resources.
- An unlimited number of calendars can be created.
- Activity type determines whether the activity uses the calendar of the assigned resource(s) or an activity calendar.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #60

Your customer only wants an enterprise set of calendars for use by all projects and resources. Which calendar should be used?

a) **Global Calendar**

b) Reporting Calendar

c) Resource Calendar

d) Project Calendar

e) Job Services Calendar

Sample Question #61

Select the statement that describes the best use of a Project Calendar.

a) Each Project Team Member wants to include planned days off in the project schedule to show planned schedule slips.

b) Finance wants to generate reports for a specific project on alternate reporting dates, and wants those dates reflected in the schedule.

c) Executive Managers want to find a way to massage the data in support of weekly project performance reporting processes.

d) The project manager has planned vacation over a specific set of dates and wants that reflected in the project schedule.

e) The project is running behind schedule, and the decision has been made to add work time on weekends.

Topic 32: Summarized Data and Job Services

Objectives	**Level**
• Set up Data Summarization procedures	Practitioner
• Set up Job Services	Practitioner

Overview

- A user can summarize and save resource quantity, cost, and custom user field information from an EPS node or a project.
- Performance is enhanced by summarizing data.
- The summarizer can be run manually or automatically.
- Summary data is seen in different parts of Primavera.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #62

Which business case would lend itself to recommending the set up of a job service to run the summarizer automatically?

a) Project Team Members need to be locked out of each project plan while data is being summarized for performance reporting.

b) Each Executive has a set of customized reports that must be run at exactly the same time for status report meetings.

c) Project Managers don't want to be bothered with the administrative overhead required to manually summarize project data.

d) Projects are very large, and all project data must be summarized at the same time prior to generating performance reports.

e) **T**he number of concurrent user licenses is limited. Therefore, only a limited number of people can be in the application at one time.

Sample Question #63

You have scheduled and summarized a project.

You have the "Last Summarized Date" showing in your Project Statistics portlet. And you have refreshed your portlet. Last Summarized Date is a Governance Audit Criteria. However, the Last Summarized Date did not change to current date.

Why?

a) You did not Commit Changes

b) Your schedule logic is broken

c) You did not Apply Actuals

d) Summary data in the project did not change

Topic 33: Design Financial Management Solution

Objectives	Level
• Design and Maintain a Financial Management Solution	Practitioner

Overview

- Rather than spreading costs evenly throughout the length of a project, a user can view how actual costs were incurred by customized financial periods.
- Financial periods, if the organization always updates the project plan according to the same, cannot overlap.
- For a given time interval (i.e., weekly, monthly, quarterly, etc.), you can quickly create a batch of financial periods. If the project plan is updated irregularly, individual financial periods can be created.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #64

Why might a Customer decide to Store Period Performance and track Past Period Actuals?

a) **Finance Managers want to see actual spends by period over time.**

b) Senior Managers prefer to see Cost data

c) Finance Managers want to freeze Actuals

d) Project Managers need to request additional budget

e) Senior Managers want to forecast future performance

Sample Question #65

Your Customer mentions that they have a separate system of record for Financial Management. They want to translate actual hours into actual costs using tables in the Financial Management system.

What functionality might be appropriate to suggest?

a) Merge actual cost data from Primavera P6 EPPM and Financial Management system

b) Merge planned cost data from Primavera P6 EPPM and Financial Management system

c) Integrate Primavera P6 EPPM with Financial Management system

d) Integrate Primavera P6 EPPM with Human Resource System

e) Integrate Primavera P6 EPPM with Materials Management system

Topic 34: Define Administrative Preferences and Settings Solution

Objectives	**Level**
• Define Administrative Preferences and Settings	Practitioner

Overview

- The organization can define a series of application-wide parameters and values that apply to all projects.
- The organization can use these settings to customize the project to meet specific project management requirements and standards.
- While all users can view these settings, a user must have special security privileges to edit them.
- There are two types of settings: Administrative Settings and Administrative Categories.
- Application administrators use the *Enterprise Data* page to establish Administrative Categories, and the *Application Settings* page to establish Administrative Settings.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #66

Identify two items that can be defined in Admin Settings.

a) **Data Limits**

b) Cost Accounts

c) **Time Periods**

d) Timesheet Usage

e) Resource Limits

Sample Question #67

The number of baselines allowed for projects is controlled in:

a) Project Defaults

b) Data Limits

c) Global Security Profile

d) EPS

Topic 35: Defining Currency

Objectives	**Level**
• Design and configure currency solution	Practitioner

Overview

- A user can specify the monetary unit or base currency used to store costs for all projects in the database, as well as the monetary unit or view currency used to display costs in windows and dialog boxes.
- Currencies are global and are available to all users in the database.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #68

Your Customer has set up global Currencies. Each currency has been linked to the Financial Management system for monthly updates. The Customer has a global User base. Users in different countries want to be able to see Cost data in their own currencies.

Where and how is this done in Primavera P6 EPPM?

a) In the User profile during system configuration

b) In User Preferences during system usage

c) In the Activities Details during project status updates

d) In Project preferences during project status updates

Sample Question #69

You have been doing a cost analysis in a project plan for an Executive Manager in the UK. Since Actual Costs are coming in via integration with a Financial Management System in US Dollars, you are looking at the data in Primavera in US Dollars.

Your UK Executive Manager wants to view the data in Euros. You are aware that Euros have been set up as one of the currencies in Primavera, and that they are updated each month along with the Actual Costs coming from the Financial Management System.

How would you get the Financial Analysis that is showing in Primavera to be done in Euros, and shown in Euros for this Executive Manager?

a) Change the Currency in your User Preferences

b) Change the Currency for the Portfolio

c) Direct the Executive to change Currency in their User Preferences

d) Change the global base currency within Primavera

Topic 36: Design Activity Step Templates

Objectives	**Level**
• Design and Maintain Activity Step Templates	Practitioner

Overview

- Activity Steps and Step Templates are often used when converting Microsoft Project schedules into Primavera. MS Project Schedules have a tendency to be large numbers of activities that resemble checklists, e.g., activities with single digit hour durations.
- Large numbers of these types of activities are difficult to manage. It is easier to structure schedules according to larger deliverables, and then manage the life cycles of each larger deliverable within Steps and Step Templates.
- Activity Step templates can also be very useful when implementing project management standard schedules and methodologies in immature project management organizations. They help drive understanding of what the work really is, and what steps need to be completed for an Activity to truly be considered complete.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #70

You are working at a Customer that is trying to standardize project plans. In the course of creating project templates, it becomes apparent that the majority of project teams are using activities to track checklist items, and that the same or similar activities show up across organizations in similar project plans.

What Primavera functionality could make the management of these action items simpler?

a) Activity Steps

b) Activity Step Templates

c) Activity Codes

d) Activity Filters

Topic 37: Design User Interface Views

Objectives	**Level**
• Design and Maintain User Interface View Solution	Practitioner

Overview

- User interface views control the functionality each user can access. Administrators can create role based views, enabling and disabling functionality based on the role of the user. These views can then be assigned to groups of users for easy administration.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp
- Oracle University Training

Sample Question #71

Which business case would lend itself to recommending the set up of multiple Global User Interface Views?

a) **A group of users will not be using a set of functionality**

b) Project Managers don't want all Users to be able to see their project data

c) Each User is special, and want to see only what they need.

d) Executives cannot be trusted to see all project information

Sample Question #72

Your Customer has determined that there are multiple User groups that will access Primavera P6 EPPM. However, your Customer wants to limit the availability of certain functionality to some of these User groups.

Which Primavera P6 EPPM functionality would address this requirement?

a) **User Interface Views**

b) Dashboards

c) Portfolios

d) Resources

Topic 38: Manage Portfolios

Objectives

- Create and Maintain Portfolios

Level

Practitioner

Overview

- If you have appropriate module access, you can use the Portfolios section to view summarized cost, schedule, and performance information for groups of projects.
- A variety of data layouts enable you to analyze and evaluate fundamentals at the group and project levels to support planning and decision making.
- Portfolios pages are also available for reviewing issues, risks, and notebooks.
- The landing page may be any available page in the Portfolios section (such as Portfolio Analysis or Executive Summary) and is defined in your assigned user interface view. If necessary, you may be able to change your view preferences to specify a different landing page.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #73

You have created a portfolio of high risk projects. The portfolio is a global filtered portfolio. You don’t have the privilege to modify this global filtered portfolio. However, you want to remove this project from calculations on the Portfolio Analysis page.

How would you do this?

a) Submit a CR to have the project removed from the global filtered portfolio

b) On the Portfolio Analysis page, deselect the project, and create a scenario without this project included

c) Submit a CR to have the project inactivated and set User Preferences to see only active projects

d) Create a manual User Portfolio, and include only desired projects in that portfolio

Sample Question #74

Your Customer wants to create portfolios under configuration management that automatically refresh based on a certain set of criteria.

Identify the Primavera feature that would meet this requirement.

a) **Global Filtered Portfolios**

b) Global Filters

c) Global Portfolio Views

d) Global Dashboards

Topic 39: Design and Configure Portfolio Information

Objectives	**Level**
• Design and configure portfolio information	Practitioner

Overview

- A portfolio view is a customized layout of project information used to analyze a group of projects.
- You can create multiple views and, for each one, you can define a set of data fields and choose to display data in either a graphical chart or scorecard format, depending on your information needs.
- Once defined, you can display a view for any project group to analyze summarized data for all projects contained in it.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #75

You have created a portfolio of high risk projects. The portfolio is a global filtered portfolio. You don’t have the privilege to modify this global filtered portfolio. However, you want to remove this project from calculations on the Portfolio Analysis page.

How would you do this?

a) Submit a CR to have the project removed from the global filtered portfolio

b) On the Portfolio Analysis page, deselect the project, and create a scenario without this project included

c) Submit a CR to have the project inactivated and set User Preferences to see only active projects

d) Create a manual User Portfolio, and include only desired projects in that portfolio

Sample Question #76

Your Customer is interested in creating a scorecard for projects in Primavera Web. However, they would like to be able to embed criteria in such a way that allows some criteria to show as more important that others.

Which Primavera P6 EPPM functionality would address this requirement?

a) **Weighted Project Codes**

b) Weighted Budget Codes

c) Weighted Resource Codes

d) Weighted Activity Codes

Topic 40: Design Portfolio Chart Views

Objectives

- Design and maintain multiple portfolio views

Level

Practitioner

Overview

A chart is a type of portfolio view you can use to analyze project data in a graphical format. You can view data in any one of the following chart formats:

- Bubble Chart
- Histogram
- Stacked Histogram
- Side-by-side Histogram
- Pie Chart

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #77

Identify two portfolio chart views:

a) Table

b) Bubble Chart

c) Gantt Chart

d) Histogram

e) Excel workbook

Sample Question #78

Identify a business use case for creating Bubble Chart view.

a) **Need to analyze three independent project variables at one time**

b) Need to analyze project data in a tabular, row and column format

c) Compare categorized grouped, side-by-side, to assist with comparisons.

d) Need to analyze project data in a vertical bar chart format.

Topic 41: Design Dashboards, Portfolios and Portfolio View Solutions

Objectives	**Level**
• Create complex data design and configurations	Practitioner

Overview

- The Implementation Consultant will use a combination of dashboards, Portfolios, Portfolio Views and Portfolio Charts to create User Interface Views targeted to specific Roles, skills, and usage within the scope of work for any Primavera implementation.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #79

Identify two locations where Scorecards can be displayed.

a) Portfolio Analysis Page

b) EPS View

c) Resource Table

d) Capacity Planning Page

e) Financial Management View

Sample Question #80

Identify the TRUE statement regarding Waterline Analysis.

a) It is under global configuration

b) It is created from a template

c) It is strictly a tabular view

d) It is a type of scorecard

Topic 42: Design Resource Management or Capacity Planning Solution

Objectives	**Level**
• Design and Maintain Resource Management or Capacity Planning Solution	Practitioner

Overview

- The *Portfolios > Capacity Planning* page enables you to analyze role allocation and cost over time for a project group. Multiple chart formats display role allocation for the projects and roles you select, enabling you to quickly identify areas of under- or over-allocation.
- Using this page, you can perform what-if analysis, graphically change project forecast dates, and apply waterline analysis techniques to assist with critical, executive-level decision making.
- During your analysis, you can create and update scenarios that provide varying snapshots of project and role allocation data.
- After conducting your analysis, you can create new portfolios containing only the projects that meet your planning criteria.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #81

A resource manager just assigned a resource, Sophie Nabors, to an activity. When checking Sophie's allocation limit in the Resource Usage View portlet, the assignment is not reflected.

Why?

e) The project must be scheduled.

f) The view must be modified.

g) The project must be summarized.

h) The view must be refreshed.

i) The resource must be re-assigned.

Sample Question #82

You are a Resource Manager that has received consistent feedback from your reporting organization that resources are spread too thin, and are working tremendous amounts of overtime. However, project dates are still slipping.

What functionality in P6 R8 might help to determine more realistic project dates that take shared resources and allocations into the calculation?

a) Resource Capacity

b) Resource Leveling

c) Resource Planning

d) Resource Dictionary

Topic 43: New Resource Management Features in P6 EPPM R8

Objectives	**Level**
• Utilize new Resource Management features in P6 EPPM R8	Practitioner

Overview

- Resource Assignments view enhances resource oriented business processes such as staffing, allocation analyses, assignment distribution and status updating.
- Other improvements include revamped resource administration and team member access to manage personal calendars.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #83

Your Customer mentions that in previous versions of Primavera it was not possible to go to one location across multiple open projects to view and fulfill resource requests.

Identify the new Resource Management location where this action may be accomplished.

a) Resource Calendar View

b) Resource Assignments View

c) Resource Analysis View

d) Resource Capacity Planning View

Sample Question #84

Your Customer has been using generic resources and bottoms up estimation processes. However, they want to implement Resource Capacity Planning.

Identify two Primavera features that must be implemented in order to implement Resource Capacity Planning for this Customer.

a) **Implement Roles to align with generic Resources**

b) Implement Project Planning Standards for consistent estimation

c) **Implement Top Down estimation using Roles**

d) Implement Bottoms Up estimation using Roles

e) Implement Project Cost Accounting and Project Templates

Topic 44: Design a Risk and Issue Management Solution

Objectives	Level
• Design and Maintain a Risk and Issue Management solution	Practitioner

Overview

- The new web-based Risks module in P6 R8 provides industry standard qualitative risk assessment and risk management capabilities.
- It provides a central location for indentifying, assessing, and managing risks (threats and opportunities) for a single project, multiple projects or a portfolio.
- Given that an organization may have numerous issue forms, Primavera enables you to create issue form categories to organize forms across the enterprise.
- Group issues and view them in chart form for enhanced analysis.

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #85

Why would a Customer want to make use of Issue Code functionality?

a) Prioritize Issues by assigning categories to each Issue

b) Link Issues to Risks and severity in the Project Plan

c) Quickly categorize and organize issues that affect projects

d) Assign responsible owners to each issue using Issue Codes

e) Link Issues to Activities and contingency in the Project Plan.

Sample Question #86

You are meeting with a Customer that mentions one of the highest pains across the enterprise is more accurately predicting costs and dates of high ROI projects, as Risks are managed in multiple spreadsheets and not consolidated into one location.

Identify the Risk functionality that you would want to discuss to respond to this issue.

a) Create Risks that link to project activities

b) Create Risks in centralized register

c) Calculate Risk exposure using Risk Scoring Matrix

d) Customize fields to align to corporate standards

Topic 45: Design Project Templates

Objectives	**Level**
• Design and Maintain Project Template solution	Practitioner

Overview

- P6 R8 eliminates the Windows-based Methodology Manager and introduces web-based Project Templates within the core P6 schema.
- Using the same schema consolidates the administration and dictionaries for Template Projects, thereby reducing overhead costs.
- The capabilities of Project Templates enable customers to standardize on their planning approach, share best practices, accelerate creation of effective project plans, and govern the wealth of P6 settings to further maximize their PPM investment

Training Options

- Primavera P6 Enterprise Project Portfolio Management 8 Design and Configuration Boot Camp

Sample Question #87

Identify the TRUE statement regarding project templates in P6 R8.

a) Methodology Manager is used to create and manage templates

b) Project Architect is used to create and manage templates

c) Methodology Manager is eliminated, all templates managed within core schema

d) Project Architect is eliminated, templates managed in separate data schema

Sample Question #88

You are a program manager that has multiple maintenance projects that occur every 6 months. Identify the P6 R8 functionality that would make the creation of supporting project plans faster and more consistent?

a) Copy and paste previous maintenance projects

b) Convert a baseline of a maintenance project to a project

c) Create a project using Methodology Manager

d) Create a project using a maintenance project template

Topic 46: What’s New in Primavera P6 EPPM R8

Objectives	Level
Identify and utilize new features and functions in Primavera P6 EPPM R8	Practitioner

Overview

- Implementation Consultants will need to be familiar with all new features and functions in release 8 to be able to provide new an innovative solutions to business problems using enhanced technology.

Training Options

- What's New In Primavera P6 Rel 8 (Oracle University Training)

Sample Question #89

You are demonstrating P6 R8 to a Customer who mentions that they have seen Primavera P6 R7 Web in the past. They note that one of their objections to purchasing Primavera was that there were so many icons that they could never remember which icon went with which functionality.

Identify two new features in P6 R8 that would address this concern.

a) Customize toolbars to display commonly used menu commands

b) Hover over icons to remember the menu command

c) Customize icons to make it easier for Users to remember menu commands

d) Customize menu commands to make it easier for Users to link to icons

e) Delete icons to reduce the complexity of use across the enterprise

Sample Question #90

You are demonstrating P6 R8 to a Customer who has been a heavy Client user in the past. They are very concerned that the transition to the Web will be difficult for most of the users, as they are used to seeing the data in very specific ways and locations.

Identify the feature you could demonstrate that would address this concern.

a) Show / Hide Activity Details

b) Float Activity Details

c) Show EPS, Project, WBS and Activities Details

d) Customize Activity Views

Exam Registration

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- **How to get full recognition as Certified Implementation Specialist?**

  To get full recognition as a Certified Implementation Specialist you need to:

  A. Update your Pearson VUE profile with your Company ID

  B. Activate your Certview Account

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