Primavera P6 and MS Project: Hands-On Schedule Building, Resourcing and Updating

4 – 8 October 2027
London - Central London four-star



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Introduction:

Schedules built in Primavera P6 and MS Project Microsoft Project often fail at the keyboard rather than in theory: calendars are wrong, summary tasks carry links, constraints mask the critical path, resources are never loaded and progress is entered without a data date or status date. Owners and contractors then exchange files that neither side trusts. This Core Concept course trains planners to set up, load, baseline and update schedules in both tools and move them cleanly between the two. Participants produce a Dual-Tool Case Schedule Pack: one case project built, baselined and statused in both applications.

Course Objectives:

- Set up enterprise project structure, projects, calendars and scheduling options in Primavera P6 and Microsoft Project
- Build activities, WBS nodes, summary tasks, relationships, lags and constraints so each tool calculates a valid critical path and float
- Load labour, nonlabour, material and cost resources, then level overallocations using the levelling functions of each tool
- Save baselines and record progress against a data date or status date, handling out-of-sequence work and earned value fields
- Configure layouts, views, filters, groupings and reports, and run in-tool schedule quality checks
- Transfer schedules between the two applications through XER and XML files and verify the imported data

Target Audience:

- Planning staff who build and maintain project schedules for owners, contractors or consultants
- Scheduling staff who record periodic progress and issue schedule updates
- Project controls staff who review contractor schedule submissions and resource curves
- Project and site engineers who sequence work packages and estimate activity durations
- PMO support staff who consolidate schedule files and produce Gantt and status reports

Course Outline:

Day 1: Workspace Set-Up, Project Creation and Calendars

- Primavera P6 Professional Workspace: Enterprise Project Structure, OBS and Projects Window
- Microsoft Project Interface: Ribbon, Gantt Chart View, Entry Table and Timeline Bar
- Project Creation Settings: Planned Start, Auto-Scheduled Versus Manually Scheduled Tasks
- Global, Project and Resource Calendars: Work Weeks, Holidays and Exceptions in Both Tools
- Existing Schedule File Audit: Scheduling Options, Calendar Assignment and Coding Conventions

Day 2: WBS, Activity Types, Task Types and Network Logic Entry

- WBS Nodes in P6 Versus Outline Levels and Summary Tasks in Microsoft Project
- P6 Activity Types: Task Dependent, Resource Dependent, Level of Effort and Milestones
- Microsoft Project Task Types: Fixed Units, Fixed Duration, Fixed Work and Effort-Driven Setting
- Relationship Entry: FS, SS, FF and SF Links With Lags in the Relationships Tab and Task Information Dialog
- Constraints, Deadlines and Recalculation: the P6 Schedule Command and Microsoft Project Automatic Calculation

Day 3: Critical Path Display, Resource and Cost Loading, Levelling and Baselines

- Longest Path and Total Float Display in P6 and Task Path Highlighting in Microsoft Project
- Resource Dictionary and Resource Sheet: Labour, Nonlabour, Material and Cost Resources With Rates
- Resource Assignments, Budgeted Units, Resource Usage Profiles and Levelling Priorities
- Baseline Assignment in P6 and Save Baseline Fields in Microsoft Project
- P6 Layouts and Microsoft Project Custom Views: Filters, Groupings, Columns and Printed Reports

Day 4: Progress Updating, Earned Value Fields, Quality Filters and File Exchange

- Progress Entry Against the P6 Data Date and Microsoft Project Status Date: Actual Dates and Remaining Durations
- Retained Logic, Progress Override and Out-of-Sequence Progress Handling
- Percent Complete Types and Earned Value Columns in P6 Compared With Microsoft Project Tracking Fields
- In-Tool Quality Filters: Open Ends, Hard Constraints, Negative Float, Long Lags and Missing Resources
- XER and XML Schedule Exchange Between P6 and Microsoft Project With Field Mapping Checks

Day 5: Lab Capstone: Dual-Tool Case Schedule Pack

- Case Project Data Set: Engineering and Technology Scope, Milestones, Resources and Rates
- Case Schedule Build in Primavera P6: Structure, Logic, Resource Loading and Baseline
- Parallel Build in Microsoft Project and Reconciliation After XML Transfer
- Two Update Cycles: Progress Entry, Baseline Variance Columns and Recovery Options
- Dual-Tool Case Schedule Pack Presentation and Peer File Review

Skills You Will Gain:

- P6 Enterprise Structure Configuration
- Calendar and Scheduling Option Set-Up
- Network Logic Entry
- Resource and Cost Loading
- Resource Levelling in Software
- Baseline and Progress Management
- Schedule Layout and Report Design
- Schedule File Exchange

Why Attend This Course:

- Leave with a Dual-Tool Case Schedule Pack: one case project built, baselined and updated in both Primavera P6 and Microsoft Project
- Work confidently in whichever tool an owner, contractor or consultant specifies, and read files produced in the other
- Find the calendar, constraint and summary-link errors that make software-calculated dates unreliable
- Compare scheduling practice with planners from construction, energy, technology and public infrastructure projects

Conclusion:

A schedule is only as reliable as the way it is configured and maintained in the software. The course moves from workspace set-up, calendars and project creation, through WBS, activity and task types and logic entry, to critical path display, resource and cost loading, levelling, baselines and layouts, then to progress updating, earned value fields, quality filters and file exchange. The final day produces a Dual-Tool Case Schedule Pack that participants can use as a working template for their next Primavera P6 or Microsoft Project schedule.