

# TECH TIP

# CREATING A CHECKLIST USING STEPS ORACLE PRIMAVERA P6

Steps are used basically as a checklist for an activity. Instead of having multiple activities you may consider utilizing steps.

Here are some of the features of Steps:

- Steps will not have durations.
- They can be marked complete.
- Steps can be given a percent complete.
- Give Steps weight for their importance.
- Create a template for Steps on an activity.
- Unlimited number of Steps can be added to any given activity.

#### Adding Steps to an Activity

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		tivities		〕≡ … ≡ /	<b>[* []* # .</b> ]	<u>ः</u> ।	\$ 6 3	S 🖁 🖪	- 3	J Q E	3 🏶 🛄	🔁 😨 😨	•						
		ojects Activities	WBS																
-9		- Layout: Filter Layout 1	122	Filter: All Activities															
•	Ac	tivity ID	Activity Name	Original Start	Finish	<b>_</b>								D13					
_				Duration	· ·		Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
		BLDG - Schee	duling	224 08-Jan-18	3 A 15-Nov-18														
2		BA-ADMN	Project Administration	213 23-Jan-18															
3		Planning		10 23-Jan-18															
		PL1000	Project Initiation	10 23-Jan-18	05-Feb-18														
-		Design and I	Engineering	22 23-Jan-18	3 21-Feb-18														
		BA1000	Building Addition Kickoff	0 23-Jan-18															
		BA1010	Design Building Addition	12 23-Jan-18															
<b>1</b>		BA1020	Review and Approve Designs	9 23-Jan-18															
<b>*</b>		BA1030 BA1040	Assemble Technical Data for Heat Pump Review Technical Data on Heat Pumps	3 05-Feb-11 10 08-Feb-11															
			Review Technical Data on Heat Pumps																
		Foundation		71 08-Jan-18															
<u> </u>		BA2010	Site Preparation	18 08-Jan-18	3 A 16-Feb-18	Ì	•												1
	F	_	rces Codes Relationships Notebook S																
	G	eneral Status Resour				Summar	У								_				
		-	Activity PL1000	Project	Initiation												Project BL	DG-09	
		Step Name	Compl		(No Step Name sel	cted)													
		🕀 Add <	Add from Template		Modify.	C Pr	int Ma	Сору											

- 1. Highlight the activity.
- 2. From the details section, select the Steps tab.
- 3. Click the 🔁 🗚 button.

G	General Status Resources Codes Relationships Notebook Steps Feedback WPs & Docs	Expenses Summary
	Activity PL1000 Project Initiation	
	Step Name Compl (New step)	step)
		nter description by cking Modify Modify Print Copy

- 4. Type in the Step Name.
- 5. Click the Modify button to enter a description for this Step.

G	eneral Status Resources Codes Relationships Notebook Steps Feedback W	s & Docs Expenses Summary					
	Activity PL1000 Project	Initiation					
	Step Name Compl	klentify Business Need					
	2 (New step)	Meet with execs to go over the business need.					
	🕂 Add 🕂 Add from Template 🔀 Delete 🔺 💌	🖾 Modify 🙄 Print 🗈 Copy					

- 6. Click the 🕂 Add button to continue adding more Steps.
- 7. Repeat process for adding the description for each Step as needed.



#### **Managing Status for Steps**

Within the Steps tab, columns can be added to manage status for each step. You can mark a Step completed or give it a weight and percent complete.

#### Adding Columns to Steps

General	Status	Resources	Codes	Relationships	Notebook	Steps	Feedback		
Activity PL1000									
Step N	lame entify Bus	siness C	ustomize	Steps Columns.					
	onfirm Fui ssign Proj				i <b>trl+⊂</b> Itrl+V				
🛃 Su	ıbmit Bus	iness Case							

- 1. In the Steps tab column headings, right click.
- 2. Select Customize Steps Columns.

✓ Available Options	Selected Options		🖌 ок
General Step % Complete	Step Name     Completed		🥝 Cancel
Step Weight Step Weight Percent	•	-	- Apply
User Defined			
Finish user_cost1	•		Default
user_number1	*		Edit Column
			😨 Help



Note: This example shows User Defined fields created.

- 3. Highlight and use the rarrow to move to Selected Options.
- 4. Click OK.



General	General Status Resources Co			Relationships	Notebook	Steps	Feedback	WPs & Doo	s Exper	nse	
-		A	ctivity	PL1000			Pro	oject Initiatio	n		
Step N	Step Name			Name Step % Complete Step Weight			nt	Step Weight Percent Com			Τ
🗾 Ide	entify Bus	siness Need		0%	1.	.0		25.0		Γ	
🛃 Co	nfirm Fu	nding		0%	1.	.0		25.0		1	
🛃 As	📕 Assign Project Manager			0%	1.	.0		25.0		1	
🛃 ຣເ	🚽 Submit Business Case			0%	1.	.0		25.0		1	
	Assign Project Manager					-					

5. Step Weight will default to 1 and depending on how many Steps are entered the Step Weight Percent will divide evenly. In this example, I changed the step weight column- the step weight Percent will automatically calculate based on the weight and will always add up to 100% for the total steps on the activity.

Activi	Ity PL 1000 Project Initiat					
Step Name	Step % Complete	Step Weight	Step Weight Percent	Completed		
🛃 Identify Business Needs	0%	2.0	26.7			
🛃 Confirm Funding	0%	3.0	40.0			
🛃 Assign Project Manager	0%	2.0	26.7			
🛃 Submit Business Case	0%	0.5	6.7			

6. Once you have completed a step- check the completed box.

General Status Relationships Codes Notebook Steps Feedback									
Activity PL 1000 Project Initiation									
Step Name	Step % Complete	Step Weight	Step Weight Percent	Completed					
📕 🛃 Identify Business Needs	100%	2.0	26.7	V					
🗾 Confirm Funding	100%	3.0	40.0						
🛃 Assign Project Manager	0%	2.0	26.7						
🗾 Submit Business Case	0%	0.5	6.7						



#### Having the Steps Drive Physical % Complete of an Activity

✓ Layout: Projects									
Project ID	Project Name								
🚽 📣 Tech Tip	Tech Tip								
Tech Tip Oct	Tech Tip October								
Test	Test Projects								
■ ♦ Other Projects Other Projects									
	Smart Grid								
1									
General Notebook Budget	Log Spending Plan Budget Summary Dates Funding Codes Defaults Resources Settings Calculations								
Activities									
Default Price / Unit for activ									
resource or role Price / Unit	S0.006								
<ul> <li>Activity percent complet</li> </ul>	te based on activity steps								
Eink buuget and At Com	plean for for standa activities								
C Reset Original Duratio	on and Units to Remaining								
	ation and Units to Original								

1. First you need to turn on "Activity percent complete based on activity steps." You can find this option at the Project level in the Project details under the "Calculations tab".

Activities									
Activities Projects									
└── Layout: Percent Complete T	ech Tip		F	ilter: All Activ	Activities				
Activity ID	Activity Nam	e			Phy	sical % Complete			
Tech Tip October	E Tech Tip October								
🖃 Tech Tip									
Pre Construction									
PL 1000	Project li	nitiation				93.33%			
<ul> <li>Drawings</li> </ul>									
	30% Dra	wings			0%				
3	90% Dra	wings				0%			
General Status Relationship	s Codes N	lotebook Steps Fe	edback						
* *	Activi	ty PL 1000			Project	Initiation			
Step Name		Step % Complete	Step Weight	Step Wei	ight Percent	Completed			
Identify Business Needs	100%	2.0		26.7	V				
Confirm Funding		100%	3.0	40.0					
🧾 Assign Project Manager		100%	2.0		26.7				
🗾 🗾 Submit Business Case		0%	0.5		6.7				

- 2. Next, make sure you have added in the Physical % Complete column in your layout view.
- 3. As you check off the completed steps from the list you will see the Physical % Complete number go up, eventually showing 100% once all the steps are marked as complete.



#### How to Create a Step Template

Your organization might have several activities that repeat within a project or across multiple projects. For example, every time you start a project, many specifications must be written and approved.

Activities Projects										
└── Layout: Percent Complete Tech Tip		F	ilter: All Acti	Iter: All Activities						
Activity ID Activity Nam	e			Phys	sical % Complete					
E Tech Tip October										
E Tech Tip										
<ul> <li>Pre Construction</li> </ul>										
PL 1000 Project li	nitiation				93.33%					
Drawings										
General Status Relationships Codes N	lotebook Steps Fee	edback								
Activi	ty PL 1000			Project Ir	nitiation					
Step Name	Step % Complete	Step Weight	Step W	eight Percent	Completed					
Identify Business Needs	100%	2.0		26.7						
🗾 Confirm Funding	100%	3.0		Customize Ste	eps Columns					
🧾 🛃 Assign Project Manager	100%	2.0	E E	Сору	Ctrl+C					
📕 🛃 Submit Business Case	0%	0% 0.5 📻			Ctri+∀					

- 1. First, create the steps on one activity
- 2. Highlight all those steps by selecting "Ctrl A" or "Shift, A" then right click select "Create Template".

General Status Relationships Co	ides Notebook Steps Fe	edback				
* *	Activity 1		30% Dri	30% Drawings		
Step Name	Step % Complete	Step Weight	Step Weight Percent	Completed		
	_					
	🚰 Assign Activity Step			×		
	✓ Display: Activity Step 1 Occurring	emplates				
	Search					
	Step Template Name	7	Step Count 4	🖻		
	_					
				•		
	1					
수 Add 수 Add fro	m Template 🕺 Delet	e 🔺 🖪	<b>7</b>			

3. Once you select Create Template, you will now have to name the Template.

4. Go to the next Activity that needs the Step Template you just created and select "Add from Template".



5. Then select the template you want.

Gene	eral Statu	is Relationships	Codes	Notebook	Steps	Fee	edback				
	* *		Acti	vity 1	30% Drawings						
St	Step Name				Step % Complete		Step Weight		Step Weight Percent		Completed
	🛃 Identify Business Needs				0%			2.0		26.7	
	🛃 Confirm Funding				0%			3.0		40.0	
2	🛃 Assign Project Manager				0%			2.0		26.7	
2	Submit E		0%			0.5		6.7			

