

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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	🔍 🖌 📃 🛄 Activities	1 🖃 5° 🛰] 🖻 🔟 • 🔳 🕖	· [] # .	<u>⊞</u> (4)	5	S 🔏 🖂		J, Q, E	8 ♥ 🛄	🔁 😨 😨	•						
0- • 2	Projects Activities WBS																		
-1	∠ Layout ■	t: Filter Layout 11	122	Filter: All Activities															
•	Activity ID		Activity Name	Original Start	Finish	-							2	013					
				Duration			Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	BLC	DG - Schec	Juling	224 08-Jan-18	IA 15-Nov-18														
<u>*</u>	BA	A-ADMIN	Project Administration	213 23-Jan-18	15-Nov-18														
	😑 Pl	lanning		10 23-Jan-18	05-Feb-18														
2	ı	PL1000	Project Initiation	10 23-Jan-16	05-Feb-18														
	E De	esign and E	Engineering	22 23-Jan-18	21-Feb-18														
		BA1000	Building Addition Kickoff	0 23-Jan-18	3														
		BA1010	Design Building Addition	12 23-Jan-18	07-Feb-18														
-		BA1020	Review and Approve Designs	9 23-Jan-18	02-Feb-18														
2		BA1030	Assemble Technical Data for Heat Pump	3 05-Feb-18	07-Feb-18														
		BA1040	Review Technical Data on Heat Pumps	10 UB-Feb-18	21-Feb-18														
	B Fe	oundation		71 08-Jan-18	IA 16-Apr-18														
•		BA2010	Site Preparation	18 08-Jan-18	A 16-Feb-18	· -													
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	General	Status Resource	ces Codes Relationships Notebook S	teps Feedtack WP	s & Docs Expenses	Summa	ry												
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- 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)
	Er Cli	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	neral Status Resources Codes Relationships Notebook Steps Feedback V	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.					
	슈 Add 슈 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
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Step N	lame entify Bus	siness C	ustomize	Steps Columns.			
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- 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	•	-	P Apply
User Defined			
Finish user_cost1	•		Default
user_numberi	*		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.



G	eneral	Status	Resources	Codes	Relationships	Notebook	Steps	Feedback	VVPs & Doo	s Expen	nse:
	-		А	ctivity	PL1000		Project Initiation				
	Step Name			Step % Complete Step Weight Step Weight Percent					Compl	Г	
	🛃 Ide	entify Bu:	siness Need		0%	1	.0		25.0		Γ
	🔏 Co	onfirm Fu	nding		0%	1	.0			1	
	Assign Project Manager				0%	1	.0			1	
					0%	1	.0	25.0			1

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.

General Status Relationships Codes Notebook Steps Feedback									
Activi	ty PL 1000	/ PL 1000							
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								
Activi	ty PL 1000	Y PL 1000						
Step Name	Step % Complete	Step Weight Percent	Completed					
🚽 Identify Business Needs	100%	2.0	26.7	ব				
🧾 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

l ⊲ Layout: I	Projects									
Project ID		Pi	roject Name					,	V	Tota
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Te	ch Tip Oct	T	ech Tip October							
+ 🛦 Tes	t	'	est Projec	ts						
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n 🔥 Sma	Smart Grid Smart Grid									
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General No	tebook B	udget Log	Spending Plan	Budget Summary	Dates Funding	Codes	Defaults	Resources	Settings	Calculations
Activities	;									
Default Prio	ce / Unit fo or role Price	ractivities v e / Units	without	\$0.00/h						
Activity	percent c	omplete bas	sed on activity s	teps						
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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 Tech Tip		Fi	Iter: All Activities						
Activity ID Activity	Name		Ph	ysical % Complete					
E Tech Tip October									
Tech Tip									
- Pre Construction				02.2284					
	ct initiation			93.33%					
- Drawings	·			0.97					
1 30%	Irawings	wings							
3 90%	rawings			U%					
General Status Relationships Code	s Notebook Steps Fe	edback							
÷ /	ctivity PL 1000		Project	t Initiation					
Step Name	Step % Complete	Step Weight	Step Weight Percent	Completed					
📕 🛃 Identify Business Needs	100%	2.0	26.7	2					
Confirm Funding	100%	3.0	40.0	V					
📕 🛃 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	er: All Activities						
Activity ID Activity Nam	e			Phys	ical % Complete					
Tech Tip October	E Tech Tip October									
E Tech Tip										
Pre Construction										
PL 1000 Project li	nitiation				93.33%					
Drawings										
General Status Relationships Codes N	lotebook Steps Fee	edback								
Activi	ty PL 1000			Project Initiation						
Step Name	Step % Complete	Step Weight	Step We	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 C	Сору	Ctrl+C					
📕 🛃 Submit Business Case		Paste	Ctri+v							
				Create Templ	ate					

- 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 C	odes Notebook Steps Feed	back				
* *	Activity 1		30% Dri	30% Drawings		
Step Name	Step % Complete	Step Weight	Step Weight Percent	Completed		
	_					
	Assign Activity Step Te	emplates		×		
	✓ Display: Activity Step Ter	npiates				
	Search I					
	Step Template Name	4	Step Count 4	🖾 🛛		
				F		
				(2)		
	1					
La Add La Add fr	m Template		-			

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.

General Status Relationships Codes N	lotebook Steps Fe	edback		
Activity 1 30% Drawings				
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	

