

# TECH TIP

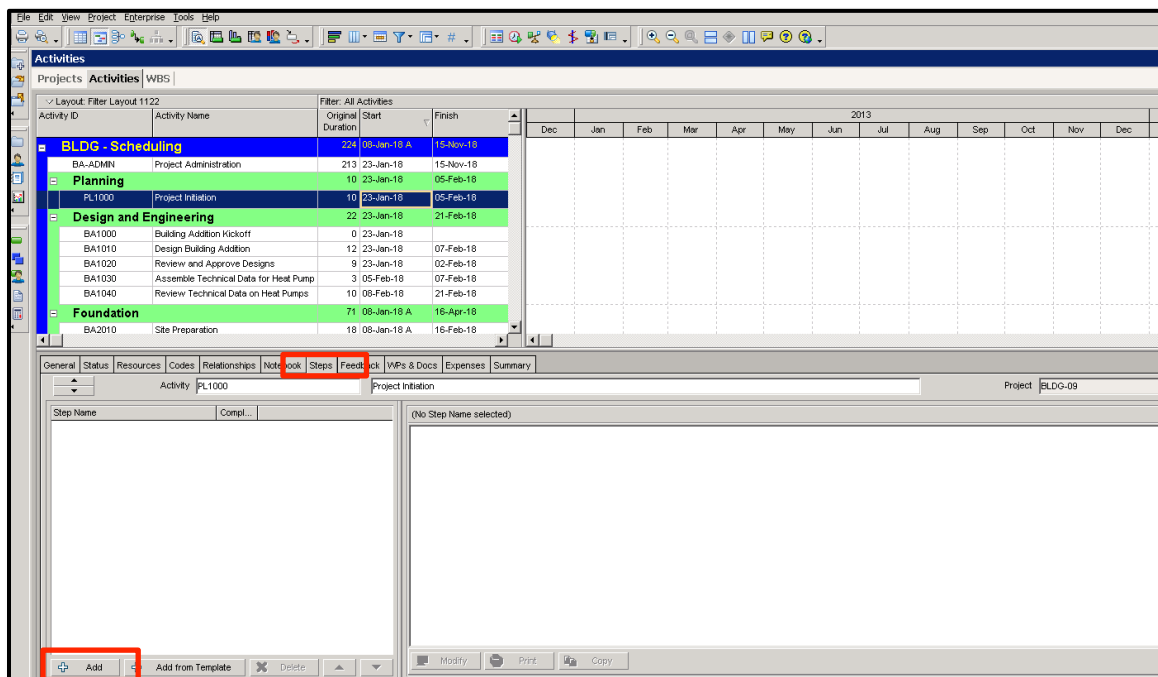
## CREATING A CHECKLIST USING STEPS ORACLE PRIMAVERA P6


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:

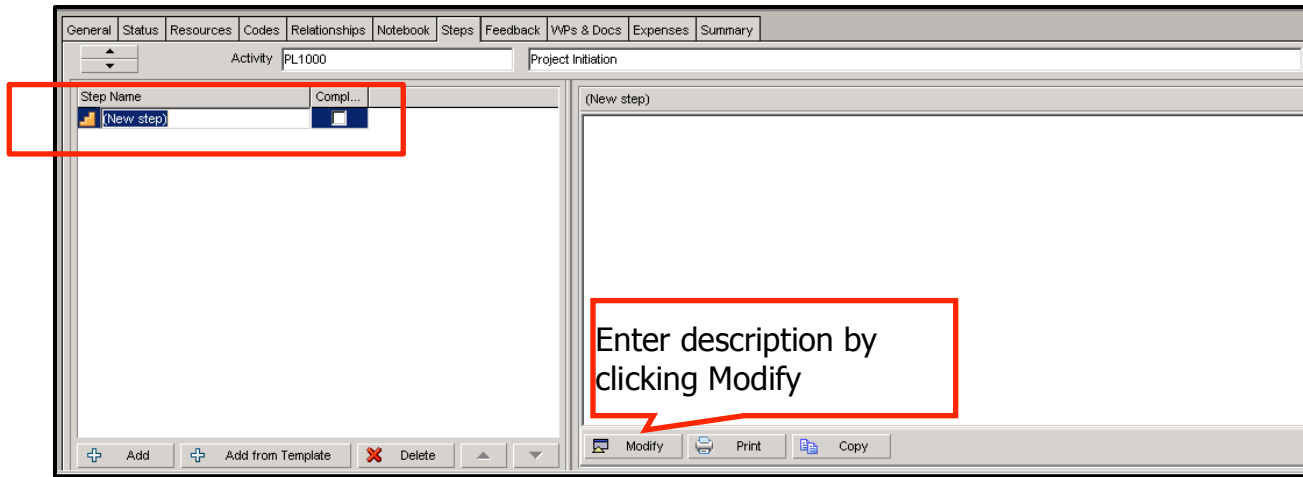
- Steps will not have durations.
- They can be marked complete.
- Steps can be given a percent complete.
- Give Steps weight for their importance.
- Create a template for Steps on an activity.
- Unlimited number of Steps can be added to any given activity.

### Adding Steps to an Activity

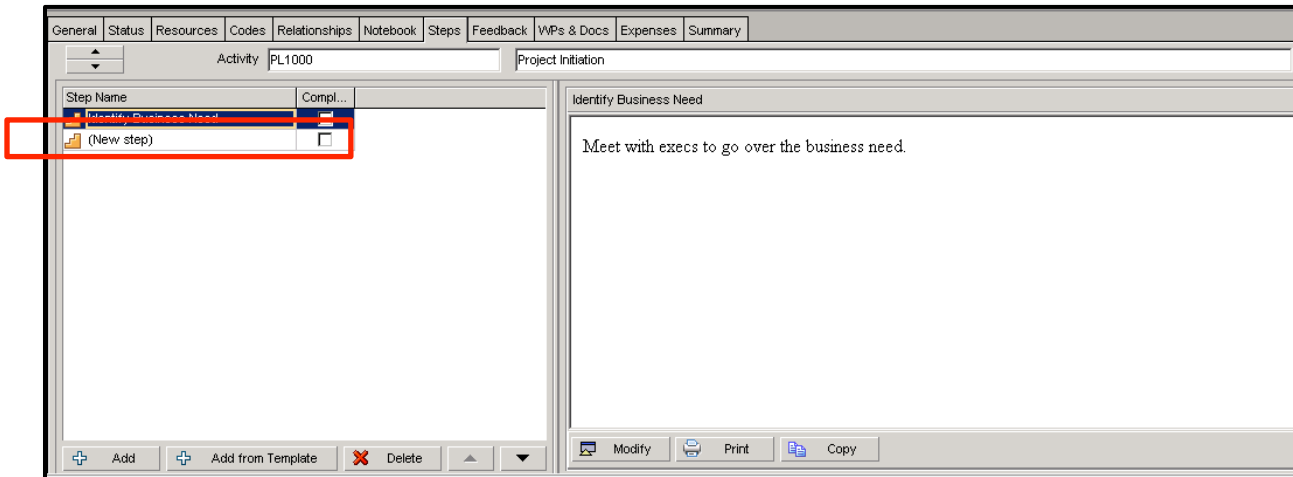



1. Highlight the activity.
2. From the details section, select the Steps tab.
3. Click the  Add button.

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



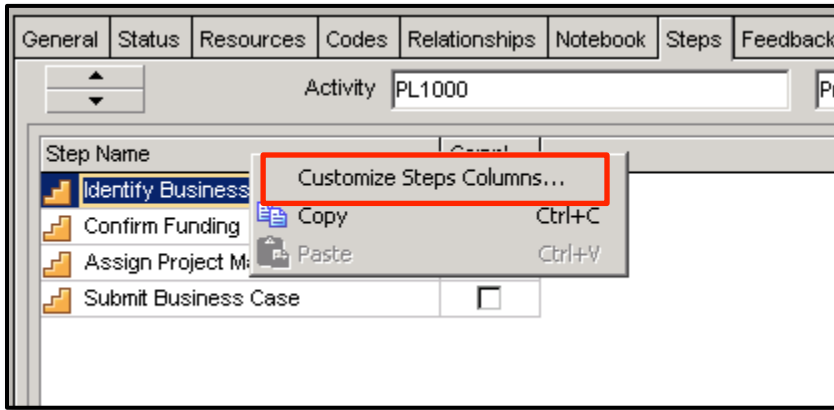
6. Click the  Add button to continue adding more Steps.
7. Repeat process for adding the description for each Step as needed.

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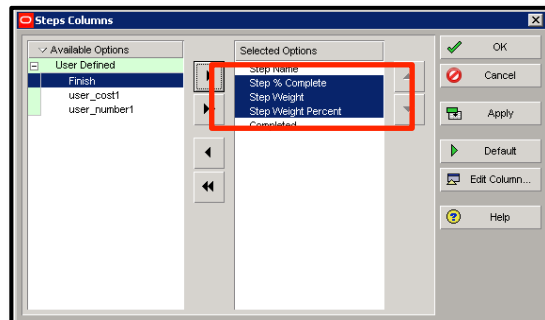
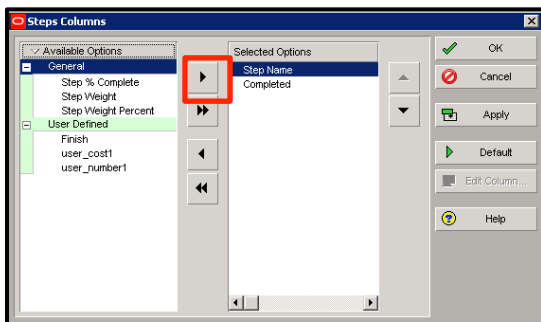
## Managing Status for Steps

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



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



Note: This example shows User Defined fields created.

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

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General	Status	Resources	Codes	Relationships	Notebook	Steps	Feedback	WPs & Docs	Expense
Activity						PL1000	Project Initiation		
Step Name	Step % Complete	Step Weight	Step Weight Percent	Compl...					
Identify Business Need	0%	1.0	25.0	<input type="checkbox"/>					
Confirm Funding	0%	1.0	25.0	<input type="checkbox"/>					
Assign Project Manager	0%	1.0	25.0	<input type="checkbox"/>					
Submit Business Case	0%	1.0	25.0	<input type="checkbox"/>					

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
Activity					PL 1000	Project Initiation
Step Name	Step % Complete	Step Weight	Step Weight Percent	Completed		
Identify Business Needs	0%	2.0	26.7	<input type="checkbox"/>		
Confirm Funding	0%	3.0	40.0	<input type="checkbox"/>		
Assign Project Manager	0%	2.0	26.7	<input type="checkbox"/>		
Submit Business Case	0%	0.5	6.7	<input type="checkbox"/>		

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	<input checked="" type="checkbox"/>		
Confirm Funding	100%	3.0	40.0	<input checked="" type="checkbox"/>		
Assign Project Manager	0%	2.0	26.7	<input type="checkbox"/>		
Submit Business Case	0%	0.5	6.7	<input type="checkbox"/>		

# CREATING A CHECKLIST USING STEPS

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

The screenshot shows the 'Calculations' tab in the Project Details window. A red box highlights the checkbox labeled 'Activity percent complete based on activity steps', which is checked. Other tabs visible include General, Notebook, Budget Log, Spending Plan, Budget Summary, Dates, Funding, Codes, Defaults, Resources, Settings, and Calculations. A red arrow points to the 'Calculations' tab.

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".

The screenshot shows the 'Activities' table with the 'Physical % Complete' column. A red box highlights the value '93.33%' for the 'Project Initiation' activity. The table is filtered by 'All Activities' and shows a hierarchy of activities: Tech Tip October, Tech Tip, Pre Construction, PL 1000, and Drawings. The 'Steps' tab is selected, showing a list of steps for 'Project Initiation'.

Activity ID	Activity Name	Physical % Complete
Tech Tip October		
Tech Tip		
Pre Construction		
PL 1000	Project Initiation	93.33%
Drawings		
1	30% Drawings	0%
3	90% Drawings	0%

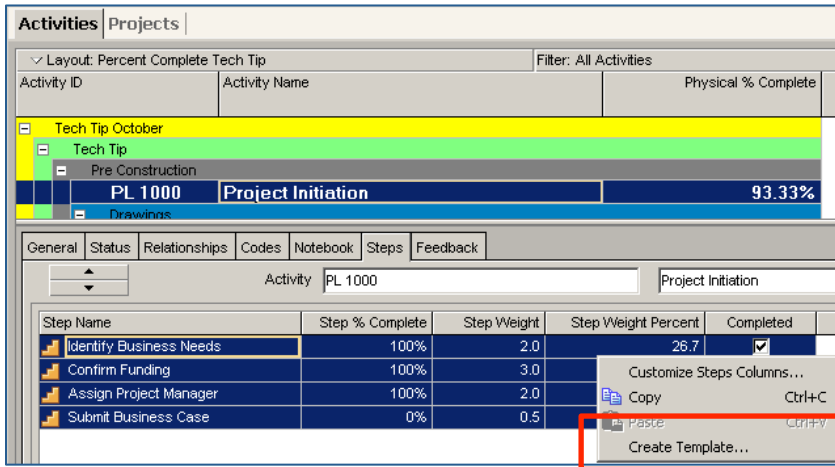
Step Name	Step % Complete	Step Weight	Step Weight Percent	Completed
Identify Business Needs	100%	2.0	26.7	<input checked="" type="checkbox"/>
Confirm Funding	100%	3.0	40.0	<input checked="" type="checkbox"/>
Assign Project Manager	100%	2.0	26.7	<input checked="" type="checkbox"/>
Submit Business Case	0%	0.5	6.7	<input type="checkbox"/>

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.

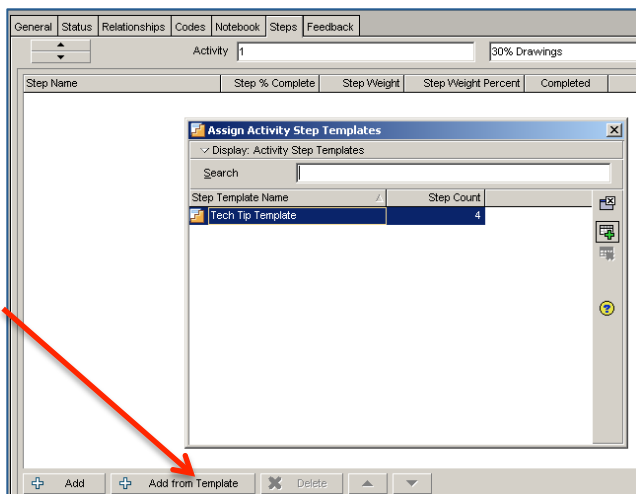
# CREATING A CHECKLIST USING STEPS

## 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.







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".



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".

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5. Then select the template you want.

General	Status	Relationships	Codes	Notebook	Steps	Feedback
		Activity		1	30% Drawings	
Step Name		Step % Complete	Step Weight	Step Weight Percent	Completed	
	Identify Business Needs	0%	2.0	26.7	<input type="checkbox"/>	
	Confirm Funding	0%	3.0	40.0	<input type="checkbox"/>	
	Assign Project Manager	0%	2.0	26.7	<input type="checkbox"/>	
	Submit Business Case	0%	0.5	6.7	<input type="checkbox"/>	