

TECH TIP

ROLLING UP PERCENT COMPLETE ORACLE PRIMAVERA P6

Have you ever wondered how to roll up percent complete at the project level? Read this month's tech tip to learn how.

USING LEVEL OF EFFORT

Objective: To be able to create a percent complete that appears at the Project level and based on project milestones.

Add activity under the project. Rest of activities will be added under the WBS elements user creates.

Activities				
Activities WBS Projects				
Layout: Percent Complete Tech Tip			Filter: All Activities	
Activity ID	Activity Name	Original Duration	Remaining Duration	Percent Complete Type
[-] Tech Tip July		70	70	
[-] Tech Tip		70	70	
[-] Pre Construction		70	70	
Precon	Project Summary	70	70	Physical

1. Create a Level of Effort activity under the project.
2. Use the Percent Complete Type of Physical. If Duration is used it will show Duration % Complete.

Create a column and change here or go to the General tab.

ROLLING UP PERCENT COMPLETE

General Dates Notebook Codes Defaults Settings Calculations Resources

Activities

Default Price / Unit for activities without resource or role Price / Units

☒ Activity percent complete based on activity steps

☒ Link Budget and At Completion for not started activities

☐ Reset Original Duration and Units to Remaining

☒ Reset Remaining Duration and Units to Original

- Under the Projects window, check the box for "Activity percent complete based on activity steps."

Activities

Activities Projects

Layout: Percent Complete Tech Tip Filter: All Activities

Activity ID	Activity Name	Original Duration	Remaining Duration	Percent Complete Type	Activity % Complete	Physical % Complete	Duration % Complete	Units % Complete
Tech Tip July		80	80				0%	0%
Tech Tip		80	80				0%	0%
Pre Construction		70	70				0%	0%
Precon	Project Summary	70	70	Physical	28.57%	28.57%	0%	0%
Drawings		70	0				100%	0%
1	30% Drawings	16	0	Duration	100%	0%	100%	100%
2	60% Drawings	19	0	Duration	100%	0%	100%	100%
3	90% Drawings	35	0	Duration	100%	0%	100%	100%
4	Drawings Complete Milestone	0	0	Duration	100%	0%	100%	100%
Construction		10	10				0%	0%
5	Mobilization	10	10	Duration	0%	20%	0%	0%

General Status Relationships Codes Notebook Steps

Activity Precon Project Summary

Step Name	% Complete	Step Weight	Step Weight Percent	Completed
Drawings Complete	100%	1.5	19.5	<input checked="" type="checkbox"/>
Precon Complete	100%	0.7	9.1	<input checked="" type="checkbox"/>
Mobilization	0%	3.5	45.5	<input type="checkbox"/>
Construction Complete	0%	1.0	13.0	<input type="checkbox"/>
Project Complete	0%	1.0	13.0	<input type="checkbox"/>

- Create Steps for this activity.
- Add Steps for all milestones that determine the percent complete of the project.
- Give each Step weight that reflects what percentage complete the project will be for each milestone.
- As the project progresses user will note the percent complete for each step as well as check the box when each step has been completed.

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Projects						
Activities Projects						
Layout: Projects						
Project ID	Project Name	Duration % of Original	Performance % Complete	Schedule % Complete	Units % Complete	
◆ Tech Tip	Tech Tip	100%	0%	0%	0%	
◆ Tech Tip July	Tech Tip July	100%	0%	0%	0%	
◆ Test	Test Projects	0%	0%	0%	0%	
◆ Other Projects	Other Projects	0%	0%	0%	0%	
◆ Smart Grid	Smart Grid	0%	0%	0%	0%	
◆ FDL	FDL	0%	0%	0%	0%	

8. In the Projects view, percentages from the Project Summary do not appear. Note: To see values in the Performance % Complete user must enter a value in the expense tab.

Activities									
Activities Projects									
Layout: Percent Complete Tech Tip Filter: All Activities									
Activity ID	Activity Name	Original Duration	Remaining Duration	Percent Complete Type	Activity % Complete	Physical % Complete	Duration % Complete	Units % Complete	
◆ Tech Tip July		70	70				0%	0%	
◆ Tech Tip		70	70				0%	0%	
◆ Pre Construction		70	70				0%	0%	
◆ Precon	Project Summary	70	70	Physical	28.57%	28.57%	0%	0%	
◆ Drawings		70	0				100%	100%	
1	30% Drawings	16	0	Duration	100%	0%	100%	100%	
2	60% Drawings	19	0	Duration	100%	0%	100%	100%	
3	90% Drawings	35	0	Duration	100%	0%	100%	100%	
4	Drawings Complete Milestone	0	0	Duration	100%	0%	100%	100%	
◆ Construction		10	10				0%	0%	
5	Mobilization	10	10	Duration	0%	20%	0%	0%	

General	Status	Relationships	Codes	Notebook	Steps	Expenses
Activity Precon Project Summary						
Expense Item	Expense Category	Accrual Type	Budgeted Cost	Actual Cost	Remaining Cost	Completion Cost
Tech Tip Expense	Training	Uniform over Act.	\$1.00	\$0.00	\$0.00	\$0.00

To enter a cost:

- Go to the Expense tab for the Project Summary activity.
- Enter a \$1.00 in the Budgeted Cost.
- Go to the Projects window and confirm the percentage is showing under the Performance % Complete column (user will need to add the column if not already in their layout).

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Projects					
Activities Projects					
Layout: Projects					
Project ID	Project Name	Duration % of Original	Performance % Complete	Schedule % Complete	Units % Complete
◆ Tech Tip	Tech Tip	100%	28.57%	0%	0%
◆ Tech Tip July	Tech Tip July	100%	28.57%	0%	0%
◆ Test	Test Projects	0%	0%	0%	0%
◆ Other Projects	Other Projects	0%	0%	0%	0%
◆ Smart Grid	Smart Grid	0%	0%	0%	0%
◆ FDL	FDL	0%	0%	0%	0%

12. This percent complete will appear under the Performance % Complete column. Note: The Duration % of Original differs in this example from the Performance % Complete. If user only wants to see the Project Summary percentage, remove the Duration % of Original column.

WBS SUMMARY ACTIVITIES

Objective: To be able to create a percent complete that appears at the Project level using WBS Summary activities.

1. Create project and WBS.
2. Go to the Projects view.

General	Dates	Notebook	Codes	Defaults	Settings	Calculations	Resources				
Activities											
Default Price / Unit for activities without resource or role Price / Units				\$0.00/h							
<input checked="" type="checkbox"/> Activity percent complete based on activity steps											
<input checked="" type="checkbox"/> Link Budget and At Completion for not started activities											
<input type="radio"/> Reset Original Duration and Units to Remaining											
<input checked="" type="radio"/> Reset Remaining Duration and Units to Original											

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- Highlight project and select Calculations from the Details.

Construction

5	Mobilization	120	10	Duration
15	Construction Summary	120	10	Physical

General Status Relationships Codes Notebook Steps Expenses

Activity 15 Construction Summary

Activity Type: WBS Summary Duration Type: Fixed Duration & Units

- Create a WBS Summary activity in each section.
- Change the Activity Type to WBS Summary.
- Change Duration type to Physical

Activities

Activities Projects

Layout: Percent Complete Tech Tip Filter: All Activities

Activity ID	Activity Name	Original Duration	Remaining Duration	Percent Complete Type	Activity % Complete	Physical % Complete	Duration % Complete	Units % Complete
Tech Tip July		120	10				91.67%	0%
Tech Tip		120	10				91.67%	0%
Pre Construction		70	0				100%	0%
Precon	Project Summary	70	0	Physical	100%	100%	0%	0%
Drawings		35	0				100%	0%
1	30% Drawings	16	0	Duration	100%	0%	100%	100%
2	60% Drawings	19	0	Duration	100%	0%	100%	100%
3	90% Drawings	35	0	Duration	0%	0%	0%	0%
4	Drawings Complete Milestone	0	0	Duration	0%	0%	0%	0%
Construction		120	10				91.67%	0%
15	Construction Summary	120	10	Physical	0%	0%	0%	0%
5	Mobilization	120	10	Duration	0%	20%	0%	0%

General Status Relationships Codes Notebook Steps Expenses

Activity Precon Project Summary

Step Name	% Complete	Step Weight	Step Weight Percent	Completed
Drawings Complete	100%	1.0	33.3	<input checked="" type="checkbox"/>
Precon Complete	100%	2.0	66.7	<input checked="" type="checkbox"/>

- Add steps to the WBS Summary. These steps should be the milestones for the WBS element.
- User will maintain Step % Complete under Steps as well as mark any steps that are complete.
Note: Steps have no bearing on the WBS Summary activity Duration % Complete amount.

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Construction		120	10	
15	Construction Summary	120	10	Physical
5	Mobilization	120	10	Duration

General	Status	Relationships	Codes	Notebook	Steps	Expenses
Activity		Construction Summary				
Expense Item	Expense Category	Accrual Type	Budgeted Units	Price / Unit	Budgeted Cost	Actual Cost
(New Expense Item)	Administration	Uniform over Acti...	10.000	\$10.00	\$100.00	\$0.00

9. Add dollar amount for each WBS Summary activity. Note: An amount must be entered in order to see the percent in the projects Performance % Complete field.

Note: The Performance % Complete is determined by two things.

- a. Steps entered on each WBS Summary activity.
- b. Amount entered in the Budget Cost field. Percentage will change dependent on the amounts entered. The more entered the more weight it will carry.

WBS WEIGHTED MILESTONES

Objective: To be able to create a percent complete that appears at the Project level using WBS Weighted Milestones.

1. Create WBS.
2. Select WBS element. Note: If different levels for a WBS element enter the WBS Weighted Milestones at the lowest level.

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The screenshot displays the WBS (Work Breakdown Structure) interface. At the top, there are tabs for 'Activities', 'WBS', and 'Projects'. Below this, a tree view shows the hierarchy of tasks. The 'Total Activities' column shows the count for each level.

WBS Code	WBS Name	Total Activities
Tech Tip July	Tech Tip July	7
Tech Tip July.Tech Tip	Tech Tip	7
Tech Tip July.Tech Tip.Pre Construct	Pre Construction	5
Tech Tip July.Tech Tip.Pre Constr	Drawings	4
Tech Tip July.Tech Tip.2	Construction	2

Below the tree view, there are tabs for 'General', 'Notebook', 'Budget Log', 'Spending Plan', 'Budget Summary', 'WBS Milestones', 'WPs & Docs', and 'Earned Value'. The 'WBS Milestones' tab is selected.

The 'Technique for computing performance percent complete' section has two radio buttons: 'Activity percent complete' and 'WBS Milestones percent complete'. The 'WBS Milestones percent complete' option is selected and highlighted with a red box. Below this, there are options for '0/100', '50/50', and 'Custom percent complete' with a value of 6.

The 'Technique for computing Estimate to Comp' section has a radio button for 'ETC = remaining cost for activity or ETC = PF * (Budget at Completion - Earned Value)'. Below this, there are options for 'PF = 1', 'PF = 1 / Cost Performance Index', and 'PF = 1 / (Cost Performance Index * Schedule P)'. The 'PF = 0.88' option is selected.

Check the box for WBS Milestones percent complete for each WBS element.

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Go to the Activities window.

Activities WBS Projects									
Layout: Percent Complete Tech Tip					Filter: All Activities				
Activity ID		Activity Name		Original Duration	Remaining Duration	Percent Complete Type	Activity % Complete	Physical % Complete	
Tech Tip July				120	10				
Tech Tip				120	10				
Pre Construction				70	0				
Precon		Project Summary		70	0	Physical	100%	100%	
Drawings				35	0				
1		30% Drawings		16	0	Duration	100%	0%	
2		60% Drawings		19	0	Duration	100%	0%	
3		90% Drawings		35	0	Duration	0%	0%	
4		Drawings Complete Milestone		0	0	Duration	0%	0%	
Construction				120	10				
15		Construction Summary		120	10	Physical	0%	0%	
5		Mobilization		120	10	Duration	0%	20%	
General Status Relationships Codes Notebook Steps Expenses									
Activity		1 30% Drawings							
Expense Item	Expense Category	Accrual Type	Budgeted Units	Price / Unit	Budgeted Cost	Actual Cost	Remaining Cost	At Completion	
Tech Tip Expense	Travel	Uniform over Acti...	1.000	\$1.00	\$1.00	\$0.00	\$0.00		

- Under the Expenses tab, highlight an activity.
- Enter \$1.00 as a Budgeted cost amount on an activity in each WBS section.

Activities WBS Projects									
Layout: Percent Complete Tech Tip					Filter: All Activities				
Activity ID	Activity Name	Original Duration	Remaining Duration	Percent Complete Type	Activity % Complete	Physical % Complete	Duration % Complete	Units % Complete	Performance % Complete
Tech Tip July		120	10				91.67%	0%	49.75%
Tech Tip		120	10				91.67%	0%	49.75%
Pre Construction		70	0				100%	0%	50%
Precon Project Summary		70	0	Physical	100%	100%	0%	0%	100%
Drawings		35	0				100%	0%	50%
1	30% Drawings	16	0	Duration	100%	0%	100%	100%	50%
2	60% Drawings	19	0	Duration	100%	0%	100%	100%	50%
3	90% Drawings	35	0	Duration	100%	0%	100%	100%	50%
4	Drawings Complete Milestone	0	0	Duration	0%	0%	0%	0%	50%
Construction		120	10				91.67%	0%	0%
15 Construction Summary		120	10	Physical	0%	0%	0%	0%	0%
5 Mobilization		120	10	Duration	0%	20%	0%	0%	0%
General Status Relationships Codes Notebook Steps Expenses									
Activity 2 60% Drawings									
Expense Item	Expense Category	Accrual Type	Budgeted Units	Price / Unit	Budgeted Cost	Actual Cost	Remaining Cost	At Completion Cost	
(New Expense Item)		Uniform over Acti...	1.000	\$1.00	\$1.00	\$0.00	\$0.00	\$0.00	

- Note: The Performance % Complete is determined by two things.
- WBS Milestones entered on each WBS element.
 - Amount entered in the Budget Cost field.

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Activities										
Activities WBS Projects										
Layout: Percent Complete Tech Tip Filter: All Activities										
Activity ID	Activity Name	Original Duration	Remaining Duration	Percent Complete Type	Activity % Complete	Physical % Complete	Duration % Complete	Units % Complete	Performance % Complete	Budgeted Expense Cost
-	Tech Tip July	120	10				91.67%	0%	50%	\$4.00
-	Tech Tip	120	10				91.67%	0%	50%	\$4.00
-	Pre Construction	70	0				100%	0%	66.67%	\$3.00
-	Precon Project Summary	70	0	Physical	100%	100%	0%	0%	100%	\$1.00
-	Drawings	35	0				100%	0%	50%	\$2.00
1	30% Drawings	16	0	Duration	100%	0%	100%	100%	50%	\$1.00
2	60% Drawings	19	0	Duration	100%	0%	100%	100%	50%	\$1.00
3	90% Drawings	35	0	Duration	100%	0%	100%	100%	50%	\$0.00
4	Drawings Complete Milestone	0	0	Duration	0%	0%	0%	0%	50%	\$0.00
-	Construction	120	10				91.67%	0%	0%	\$1.00
15	Construction Summary	120	10	Physical	0%	0%	0%	0%	0%	\$1.00
5	Mobilization	120	10	Duration	0%	20%	0%	0%	0%	\$0.00

- Updated WBS Weighted Milestones for construction. Since this value is \$2.00 it holds more percentage.