

TECH TIP

HOW TO CREATE A NESTED FILTER ORACLE PRIMAVERA P6

Overview

Filters are powerful tools to extract specific information from the schedule. Used in conjunction with Group & Sort, and customizing Columns, Schedulers working in P6 can create a Layout. This edition of Tech Tips will discuss the topic from a very basic "how to create a filter" to building nested filters.

Definition

Filtering determines which activities are displayed in a layout.

- Enables you to create customized layouts that:
- Limit the number of activities displayed.
- Help you focus on a particular group of activities (critical activities, for example).
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Creating a Filter in P6:

Like many features of P6, usually there are multiple different methods to accomplish the same task. Filters can be accessed in four different locations:

Listed under the "View Menu" Filter By
 Selecting the Filter icon in the "View Toolbar"
 Also from the "Layout Options Bar" Filter By
 Lastly, by right click in the Activity Table Filter By

<u>Regardless of the method used above, please select the option to "Customize."</u>

✔ Customize...

Next we will create a new filter using the "New," or add button.

| All Projects | Show projects that match | | ✓ Ø | OK Cancel |
|------------------------|--------------------------|--------|----------------------------------|--------------|
| Filter | ∇ | Select | | |
| – Default | | | | Apply |
| T All EPS Elements | | | | |
| Thecked Out | | | 45 | New |
| T Currently Open | | | 32 | Delete |
| 🍸 Status - Active | | | | 001010 |
| 🍸 Status - Inactive | | | Pr- | Сору |
| 🍸 🝸 Status - Non What- | lf | | - | |
| 🍸 Status - Planned | | | P- | Paste |
| 🍸 Status - What-If | | | | |

No matter which kind of filter you're building, this step below is one of the most important. Choose the criteria for "Display all rows." To change selection, simply click your mouse in the cell below "Parameter."

(All of the following) meaning that the conditions in each and every one of the rows
must be satisfied. For example, this would be a good method to find a project(s) in the
Northern Region, specifically the Mountain Division, consisting of a wood structure,
starting construction next May. All four of those conditions would have to be met, for
the project(s) to appear in the filter.

| Filter | | | | | | _ 🗆 × |
|------------------|----------------------|------|-------|------------|----|--------|
| Filter Name | (Untitled Filter) | | | | 1 | ок |
| 🗸 Display: Filte | r | | 50 | | 0 | Cancel |
| Display all rows | Parameter | ls | Value | High Value | | |
| - | (All of the followin | g) 🗲 | | | 45 | Add |
| Where | | | | | u | |
| And | | | | | × | Delete |
| And | | | | | | |
| And | | | | | 00 | Cut |
| And | | | | | Pa | Conv |
| And | | | | | 43 | Coby |

• (Any of the following) means that if any of the conditions in a single row is met, they will be filtered. Let's say your department has unique project ID numbers, this would be great for making a list.



| 😑 Filter | | | | | | _ 🗆 × |
|-----------------|--------------------|---------|-------|------------|----|--------|
| Filter Name | (Untitled Filter) | | | | 1 | ок |
| ⊂ Display: F | ilter | 50 | 50 | | 0 | Cancel |
| Display all row | /s Parameter | ls | Value | High Value | | |
| Ξ | (Any of the follow | /ing) 🗾 | | | 45 | Add |
| When | е | | | | | |
| Or | | | | | × | Delete |
| Or | | | | | | |
| Or | | | | | 00 | Cut |
| Or | | | | | Ba | Conv |
| Or | | | | | 43 | COD) |

Information Regarding Filters

- 3 ways to apply Filter
 - Filter on
 - Filter out
 - Filter "contains"
- Different Parameters for Project Level vs Activity Level
- Multiple Filters can be used in the same Layout
- Date in the Filter name (optional) keeps track of when it was created
- Be very careful deleting Filters, they could be used by another person for Layouts or Reports.
- Periodic QC to maintain effectiveness. Make sure the filter is still working properly, that the parameters haven't changed, that it's picking up what it's intended for.



Nested Filter

Nested Filters are a powerful tool in specifying Parameters and Values. By simply adding additional levels to the filter hierarchy, you can easily create a Nested Filter. Here are the steps:

1. Create basic (All of the following) filter

| 🗢 Filter | | | | | | _ 🗆 × |
|------------------|-----------------------|------------------|-------|------------|----|--------|
| Filter Name | Planned Activities in | the Next 10 DAYS | | | 1 | ок |
| 🗢 Display: Filte | r | | | | 0 | Cancel |
| Display all rows | Parameter | ls | Value | High Value | | |
| = | (All of the followin | g) | | | - | Add |
| Where | | | | | | Aud |
| | 8-0 | | | | × | Delete |
| | | | | | do | Cut |
| | | | | | | Сору |
| | | | | | | Paste |
| | | | | | - | * + |
| | | | | | • | Help |
| • | | | | | • | |

2. Add another (All of the following) next to "Where."

| 🖸 Filter | | | | | | _ 🗆 × |
|------------------|--------------------------|-----------------|-------|------------|----|--------|
| Filter Name | Planned Activities in th | ne Next 10 DAYS | | | 1 | ок |
| 🗢 Display: Filte | r | | | | 0 | Cancel |
| Display all rows | Parameter | ls | Value | High Value | | |
| Ξ | (All of the following) | | | | 42 | Add |
| Where | (All of the following) | | | | - | |
| | | | | | × | Delete |
| | | | | | ab | Cut |
| | | | | | Ba | Сору |
| | | | | | | Paste |
| | | | | | | * > |
| | | | | | • | Help |
| • | | | | | · | |



3. Simply adding another row automatically indents, becoming Level 3. If you ever need to adjust the rows in hierarchy, use the directional arrows in the lower right hand corner.

| Filter | | | | | | |
|-------------------|-----------------------|------------------|-------|------------|-----|------------|
| Filter Name | Planned Activities in | the Next 10 DAYS | | | 1 | ок |
| ∽ Display: Filter | | | | | | Cancel |
| Display all rows | Parameter | ls | Value | High Value | - | |
| Ξ | (All of the followin | g) | | | - | Add |
| Where | (All of the followin | g) | | | | 1100 |
| Wher | | | | | × | Delete |
| | | | | | de | Cut |
| T | | | | | | Сору |
| - 1 | | | | | | Paste |
| | | | | | | A |
| - A. | | | | | | • (|
| | | | | | (?) | Help |
| .1_1 | | | | | | |
| · | | | | | | |

4. Specify the Parameters and Values

| V Di | splay: Filter | | | | | 0 | Cancel |
|---------|---------------|------------------------|-----------------|-----------------|------------|----------|---------|
| Display | yall rows | Parameter | ls | Value | High Value | - | |
| - | | (All of the following) | | · | | <u>ج</u> | Add |
| Ξ | Where | (All of the following) | | | | - | 1 10101 |
| | Where | Activity Type | is not equal to | Level of Effort | | × | Delete |
| | And | Activity Type | is not equal to | WBS Summary | | (La | |
| | And | Activity Status | is not equal to | Completed | | 00 | Cut |
| | | | | | | | Сору |
| | | | | | | A | Paste |
| | | | | | | | |
| | | | | | | | • |
| | | | | | | 0 | Heln |



5. Add another row, for the Parameter select "(Any of the following)." Use the directional arrows to outdent to level 2. The filter is now combining "And" & "Or."

| | | | | | | - | |
|------------------|--------------------------|------------------------|-----------------|-----------------|------------|-----|----------|
| ⊲ Disp isplav | play: Filter all rows | Parameter | ls | Value | High Value | 0 | Cancel |
|] | | (All of the following) | | | | -1 | 0.1.1 |
| • | Where | (All of the following) | | | | 57 | Add |
| | Where | Activity Type | is not equal to | Level of Effort | | × | Delete |
| | And | Activity Type | is not equal to | WBS Summary | | | |
| | And | Activity Status | is not equal to | Completed | | 00 | Cut |
| | And | (Any of the following) | > | | | Ba | Conv |
| | Where | | | | | | |
| | Or | | | | | | Paste |
| | Or | | | | | 5 | |
| | | | | | (| I ↓ | • |
| | | | | | | | • |
| | | | | | | ~ | |
| | | | | | | (?) | Help |

6. Specify the Parameters and Values

| ∀ Di | isplay: Filter | <u>.</u> | | | | 0 | Cancel |
|-------|----------------|------------------------|--------------------|-----------------|------------|-----|----------|
| ispla | y all rows | Parameter | ls | Value | High Value | | |
| | | (All of the following) | | | | 45 | Add |
| Ξ | Where | (All of the following) | | | | - | |
| | Where | Activity Type | is not equal to | Level of Effort | | × | Delete |
| | And | Activity Type | is not equal to | WBS Summary | | (La | |
| | And | Activity Status | is not equal to | Completed | | 00 | Cut |
| Ξ | And | (Any of the following) | | | | Bh | Conv |
| | Where | Start | is within range of | DD-2D | CD+10D | 43 | 0007 |
| | Or | Finish | is within range of | DD-2D | CD+10D | | Paste |
| | Or | Activity Status | equals | In Progress | | | . 1 |
| 1946 | | | | -01 | | ▲ - | • |
| | | | | | | | • |
| | | | | | | | |
| | | | | | | (?) | Help |



Summary

P6 has the filtering capability to combine "And" & "Or," into a single, nested filter. This edition of Tech Tips outlined, in just a few steps, how to achieve this functionality. Common challenges experienced with filters have been identified and checks provided to ensure the P6 User successfully creates an assortment of different filters for P6.

