

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).
- 1. P6 Fundamentals Copyright © 2013, Oracle. All rights reserved.

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				
T Checked Out			¢	New
T Currently Open			34	Delete
🍸 Status - Active				001010
🍸 Status - Inactive			Pp.	Сору
🍸 Status - Non What-It	f		-	
🍸 Status - Planned				Paste
T 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	5.7	Sov.		0	Cancel
Display all rows	Parameter	ls	Value	High Value		
	(All of the followin	g) 🗲			÷	Add
Where					u	
And					×	Delete
And						
And					ab	Cut
And						Сору
And						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 Na	r Name (Untitled Filter)					1	OK
∽ Display: Filter							Cancel
Display	all rows	Parameter	ls	Value	High Value		
Ξ		(Any of the follow	ring)			÷	Add
	Where					-	
13	Or					×	Delete
	Or					do	Cut
-	Or					00	
3. E	Or Or					- 0	Сору

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

itter Name	Planned Activities in	the Next 10 DAYS			1	OK
∽ Display: Filter						Cancel
isplay all rows	Parameter	ls	Value	High Value	0	
]	(All of the followin	g)			÷	Add
VVhere						
					×	Delete
					do	Cut
						Сору
						Paste
					-	* •
					•	Help

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

Filter						_ 🗆 🗙
Filter Name	Planned Activities in the N	ext 10 DAYS			√	ок
∽ Display: Filte	r				0	Cancel
Display all rows	Parameter	ls	Value	High Value		
	(All of the following)				÷	Add
Where	(All of the following)					
					×	Delete
	~				do	Cut
						Сору
					1	Paste
					-	* *
					?	Help
•				Þ		



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.

D Filter						_ 0
Filter Name	Planned Activities in	the Next 10 DAYS			1	OK
∽ 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
					do	Cut
— Т					B	Сору
					ß	Paste
					4	A .
						•
					(?	Help

4. Specify the Parameters and Values

V Di	splay: Filter		10			0	Cancel
Display all rows Parameter Is Value High Value				-			
-		(All of the following)		·		÷	Add
Ξ	Where	(All of the following)				-	1 100
	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		ab	Cut
							Сору
						A	Paste
							•
						(?)	Help



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."

ilter Na		anned Activities in the Nex				-	OK
	play: Filter all rows	Parameter	Is	Value	High Value	0	Cancel
3		(All of the following)				-1	0.44
	Where	(All of the following)				÷	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		ab	Cut
	And	(Any of the following)	>			Ba	Сору
	Where						>
	Or						Paste
	Or					5	
					(Ⅰ ↓	
						~	
						?	Help

6. Specify the Parameters and Values

✓ Display: Filter							Cancel
	y all rows	Parameter	ls	Value	High Value		
☐ (All of the follow)		(All of the following)				÷	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		do	Cut
And	(Any of the following)				Ba	Сору	
	Where	Start	is within range of	DD-2D	CD+10D	43	000)
	Or	Finish	is within range of	DD-2D	CD+10D		Paste
	Or	Activity Status	equals	In Progress			. 1
				- 62		▲ -	•
							.
						?	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.

