

TECH TIP

USING ACTIVITY IDS TO THE P6 USER'S ADVANTAGE ORACLE PRIMAVERA P6

Activity IDs are used in Primavera P6 to uniquely identify an Activity within project schedules. No two activities can have the same ID in a particular project. Primavera P6 allows users to assign a prefix and a suffix with increments in the suffix for the next activity added. A P6 User can assign any type of prefix or suffix to an Activity. Even though this is the case, Activity IDs can be used to add value and can create more unified data output in projects. Activity IDs can be created to uniquely represent project phases, milestones, activity types, or whatever information is most important to track for a particular project. Building intelligence into the Activity ID is valuable and can ensure the project team is following standards. This Tech Tip will show P6 users the different ways in which Activity IDs can be used to the P6 user's advantage

Defaults for New Activities

Primavera P6 provides users with default settings when adding new activities on the Project level > Project details > Defaults tab. This tool provides ease when adding **new** activities to the project schedule if there is a standardized Activity ID process that needs to be put in place.

For example, in this project the Defaults for New activities are set to the following:

The screenshot shows the 'Defaults for New Activities' dialog box in Primavera P6. The 'General' tab is selected. Under 'Duration Type', 'Fixed Duration & Units' is chosen. 'Percent Complete Type' is set to 'Duration'. 'Activity Type' is 'Task Dependent'. 'Cost Account' is empty, and 'Calendar' is 'Standard 5 Day Workweek'. Under 'Auto-numbering Defaults', 'Activity ID Prefix' is 'A', 'Activity ID Suffix' is '1000', and 'Increment' is '10'. The checkbox 'Increment Activity ID based on selected activity' is checked.

For each new activity added into the schedule, the P6 User can choose the Prefix and Suffix of the activity and the Increment for the next activity added. This basic auto-numbering feature allows P6

Users to add new Activity IDs with ease instead of manually changing the Prefix and Suffix of the Activity ID. P6 Users should keep in mind this change only affects **New Activities added**, and not ones that are already in the schedule. So it is best to set this up before adding in New Activities. In this example, Defaults will be changed depending on which WBS the new Activity is being added into.

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For example, "MIL" Prefix will be used for new Activities added within the "Milestone" WBS.

PIPE Pipeline Project 15-Oct-20 08:0 13-Jan-21 05:00 PM

General Dates Notebook Budget Log Spending Plan Budget Summary Funding Codes Defaults Resources Settings Calculations

Defaults for New Activities

Duration Type: Fixed Duration & Units
Percent Complete Type: Duration
Activity Type: Task Dependent
Cost Account:
Calendar: Standard 5 Day Workweek

Auto-numbering Defaults

Activity ID Prefix: MIL
Activity ID Suffix: 1000
Increment: 10
☒ Increment Activity ID based on selected activity

Utilizing Defaults for New Activities

Setting up standardized Defaults for New Activities within a project can benefit the P6 User in many ways. Here we have a new Pipeline Project with (7) different WBS. These are the (7) phases of the project. No activities have been added yet

Activity ID	Activity Name	Original Duration	Start	Finish	Total Float	Predecessors	Successors
Pipeline Project		0.0d			0.0d		
Milestones		0.0d			0.0d		
Procurement		0.0d			0.0d		
Design		0.0d			0.0d		
Permits		0.0d			0.0d		
Land		0.0d			0.0d		
Construction		0.0d			0.0d		
Closeout		0.0d			0.0d		

To ensure a standardized and streamlined process new Activities will be named based on their respective WBS to easily pull reports and data out of the project. When adding new activities to different WBS's be sure to go back to the defaults on the project level and change it to the Prefix of which everyone has agreed upon for a particular project phase. This will ensure efficiency and accuracy when adding the first activity in the WBS

*Note: The Prefix will only need to be changed upon the first creation of the first activity within its respective WBS because "Increment Activity ID based on selected Activity" is selected

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Layout: Classic Schedule Layout Filter: All Activities

Activity ID	Activity Name	Original Duration	Start	Finish	Total Float	Predecessors	Successors
Pipeline Project		0.0d	16-Oct-20 08:00 AM	16-Oct-20 08:00 AM	0.0d		
Milestones		0.0d	16-Oct-20 08:00 AM	16-Oct-20 08:00 AM	0.0d		
MIL-1000	Work Order Approved	0.0d	16-Oct-20 08:00 AM				
Procurement		0.0d			0.0d		
Design		0.0d			0.0d		
Permits		0.0d			0.0d		
Land		0.0d			0.0d		
Construction		0.0d			0.0d		

General Status Resources Predecessors Successors

Activity: MIL-1000 Work Order Approved Project: P

Activity Type: Start Milestone Duration Type: Fixed Duration and Units/Time % Complete Type: Duration Activity Calendar: Standard 5 Day Workweek

WBS: PIPE.WBS3 Milestones Responsible Manager: Enterprise Primary Resource:

The first activity added has an Activity ID of "MIL-1000" and because at the project level an increment of 10 would be added to each new activity-based on the highlighted activity the next activity added would be:

Layout: Classic Schedule Layout Filter: All Activities

Activity ID	Activity Name	Original Duration	Start	Finish	Total Float	Predecessors	Successors
Pipeline Project		0.0d	15-Oct-20 05:00 PM	16-Oct-20 08:00 AM	0.0d		
Milestones		0.0d	15-Oct-20 05:00 PM	16-Oct-20 08:00 AM	0.0d		
MIL-1000	Work Order Approved	0.0d	16-Oct-20 08:00 AM				
MIL-1010	Procurement Complete	0.0d		15-Oct-20 05:00 PM			
Procurement		0.0d			0.0d		
Design		0.0d			0.0d		
Permits		0.0d			0.0d		
Land		0.0d			0.0d		

General Status Resources Predecessors Successors

Activity: MIL-1010 Procurement Complete Project: P

Activity Type: Finish Milestone Duration Type: Fixed Duration and Units/Time % Complete Type: Duration Activity Calendar: Standard 5 Day Workweek

WBS: PIPE.WBS3 Milestones Responsible Manager: Enterprise Primary Resource:

Using "MIL" in the activity ID the P6 User can tell immediately that this Activity is a Milestone activity and by adding the activities in which the work should begin can also tell by the increments that Activity ID "MIL-1000" should begin before "MIL-1010"

Now that all new milestone activities have been added into the Milestone WBS it is time to navigate back to the Defaults for New Activities to change the Prefix so it aligns with the Procurement WBS.

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General Dates Notebook Budget Log Spending Plan Budget Summary Funding Codes Defaults Resources Settings Calculations

Defaults for New Activities

Duration Type: Fixed Duration & Units
 Percent Complete Type: Duration
 Activity Type: Task Dependent

Cost Account: [User Icon]
 Calendar: Standard 5 D

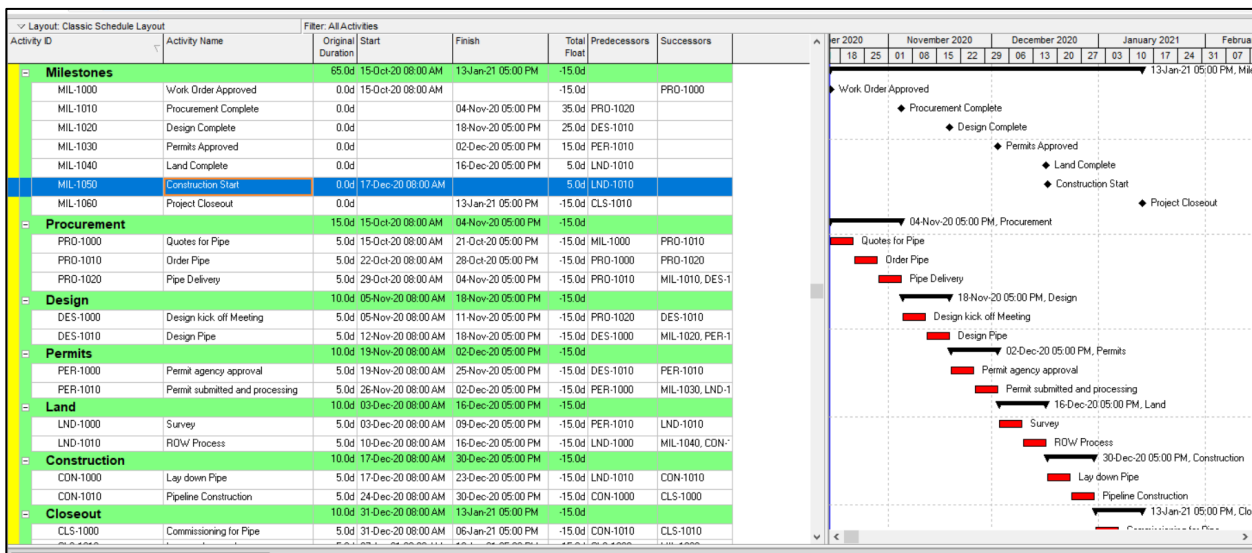
Auto-numbering Defaults

Activity ID Prefix: PRO
 Activity ID Suffix: 1000
 Increment: 10

☒ Increment Activity ID based on selected activity

The Activity ID Prefix for the Procurement WBS will be "PRO". Now the first new activity added within the Procurement WBS will be PRO-1000 based off the above defaults. Using the Defaults for New Activities can ensure there are no typos in the Prefix or Suffix to maintain a streamlined Activity ID process. P6 Users can utilize this whenever adding the first new activity in WBS'.

The result will look like below:



Once logic ties have been made, it is still clear by the Activity IDs which activities are starting and or finishing before other activities within their respective WBS. All Activities with a suffix of 1000 should be the first activities within their WBS to begin work on that activity. It is also clear by the prefix of the Activity IDs to recognize which activities belong to which WBS. This is highly valuable information, especially with Projects that have thousands of activities in them and P6 Users can identify at first glance what phase that Activity is in and the logical ties within the WBS

Retrievable Data by Activity IDS

Once activity IDs are added in with value to a schedule it becomes more efficient for the P6 User to retrieve data within the schedule. For example, if an individual apart of the project team would like to see the first milestone activity in the schedule, based on the Activity IDs created above a P6 User could easily filter the following:

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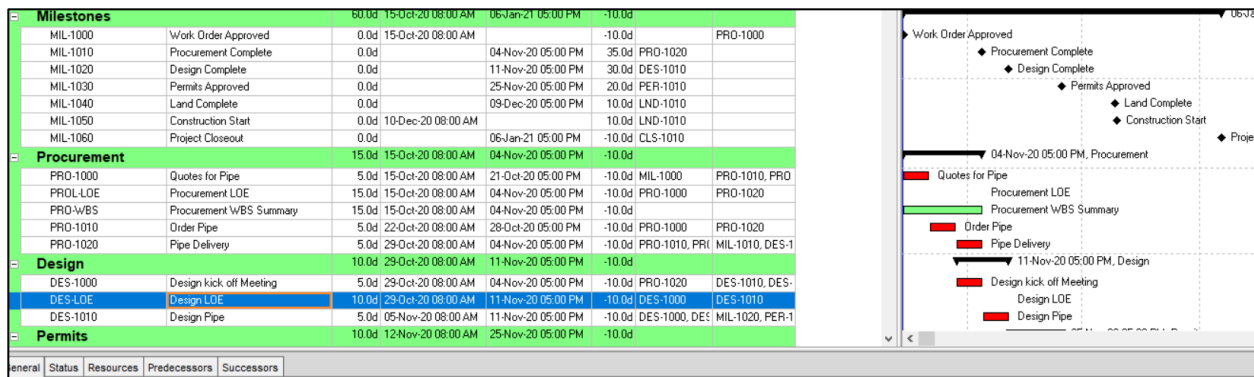
The screenshot displays the Primavera P6 software interface. The main window shows a project schedule with columns for Activity ID, Activity Name, Original Duration, Start, Finish, Total Float, Predecessors, and Successors. The 'Pipeline Project' is expanded, showing milestones and various activities like Procurement, Design, Permits, Land, Construction, and Closeout. A filter dialog box is open, titled 'Filter', with the filter name 'Milestone Activities'. The filter criteria are set to 'Where Activity ID contains MIL' and 'And Activity ID contains 1000'. The dialog box also includes options for 'Display: Filter', 'Display all rows', and 'Parameter'.

In addition, if an individual would like to see what all the kick-off activities within a project schedule because of the format followed above, one could easily filter the following:

The screenshot displays the Primavera P6 software interface, showing a more detailed project schedule. The main window includes columns for Activity ID, Activity Name, Original Duration, Start, Finish, Total Float, Predecessors, and Successors. The 'Pipeline Project' is expanded, showing milestones and various activities like Procurement, Design, Permits, Land, Construction, and Closeout. A filter dialog box is open, titled 'Filter', with the filter name 'Kick Off Activities'. The filter criteria are set to 'Where Activity ID contains 1000'. The dialog box also includes options for 'Display: Filter', 'Display all rows', and 'Parameter'.

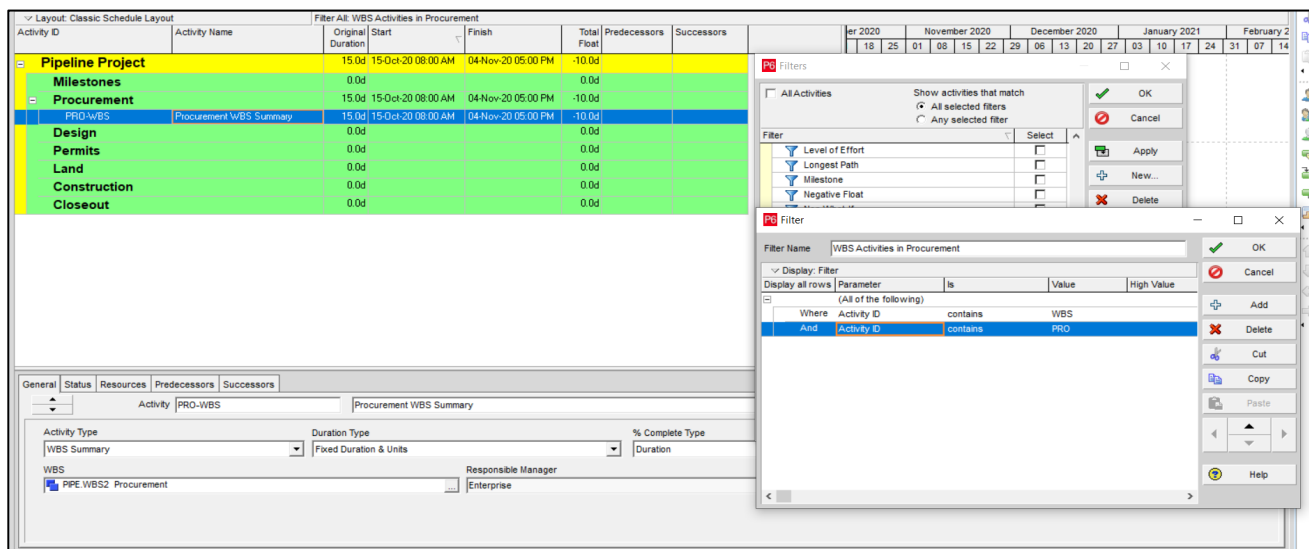
This easily shows what kick-off activities begin first in each WBS and what phase of the project the Activity is in. LOE and WBS Summary activities can also easily be recognized by changing the suffix of an activity to the following:

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Creating LOE and WBS as suffix change does not confuse the project team in the Suffix for Milestone and a Task-Dependent activities so a P6 User can still easily recognize that anything ending in LOE or WBS is not task dependent or a Milestone activity. But one can still tell by the Prefix what project phase that LOE/WBS is a part of

Filters can easily pull information from the Activity ID to find both WBS and LOE activities:



Renumbering Existing Activities

If a project has already started and there is no formatting to Activity IDs a P6 User can utilize the Renumber Activity IDs feature that Primavera P6 offers. For example, this cost account project was created with no value or intelligence to the Activity IDs:

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Layout: Classic Schedule Layout		Filter: All Activities						
Activity ID	Activity Name	Original Duration	Start	Finish	Total Float	Predecessors	Successors	
Cost Account Project		80.0d	19-Oct-20 08:00 AM	05-Feb-21 05:00 PM	0.0d			
A1080	Kick Off	5.0d	19-Oct-20 08:00 AM	23-Oct-20 05:00 PM	0.0d		A1070	
A1070	Activity After Kick Off	5.0d	26-Oct-20 08:00 AM	30-Oct-20 05:00 PM	0.0d	A1080	A1030	
A1030	Permits	5.0d	02-Nov-20 08:00 AM	06-Nov-20 05:00 PM	0.0d	A1070	A1000	
A1000	Land	20.0d	09-Nov-20 08:00 AM	04-Dec-20 05:00 PM	0.0d	A1030	A1010	
A1010	Construction	30.0d	07-Dec-20 08:00 AM	15-Jan-21 05:00 PM	0.0d	A1000	A1020	
A1020	Closeout	15.0d	18-Jan-21 08:00 AM	05-Feb-21 05:00 PM	0.0d	A1010		

There is no way of telling which activity is supposed to logically begin before another or what Phase these activities belong to

Highlight the order in which activities are logically linked. And choose a prefix, suffix, and increment value

Activity ID	Activity Name	Original Duration	Start	Finish	Total Float	Predecessors	Successors
Cost Account Project		80.0d	19-Oct-20 08:00 AM	05-Feb-21 05:00 PM	0.0d		
A1080	Kick Off	5.0d	19-Oct-20 08:00 AM	23-Oct-20 05:00 PM	0.0d		A1070
A1070	Activity After Kick Off	5.0d	26-Oct-20 08:00 AM	30-Oct-20 05:00 PM	0.0d	A1080	A1030
A1030	Permits	5.0d	02-Nov-20 08:00 AM	06-Nov-20 05:00 PM	0.0d	A1070	A1000
A1000	Land	20.0d	09-Nov-20 08:00 AM	04-Dec-20 05:00 PM	0.0d	A1030	A1010
A1010	Construction	30.0d	07-Dec-20 08:00 AM	15-Jan-21 05:00 PM	0.0d	A1000	A1020
A1020	Closeout	15.0d	18-Jan-21 08:00 AM	05-Feb-21 05:00 PM	0.0d	A1010	

2020

November 2020

December 2020

January 2021

February 2021

18

25

01

08

15

22

29

06

13

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27

03

10

17

24

31

07

14

05-Feb-21 05:00 PM

Kick Off

Activity After Kick Off

Renumber Activity IDs

☐ Increment Activity ID based on selected activities
Increment Value
10

☒ Auto-number
Prefix
A

Suffix
1000

Increment Value
10

☐ Replace beginning characters
Number of characters
3

Replace with
FL2

☐ Renumber selected activities in baseline

OK

Cancel

Help

Activity ID	Activity Name	Original Duration	Start	Finish	Total Float	Predecessors	Successors
Cost Account Project		80.0d	19-Oct-20 08:00 AM	05-Feb-21 05:00 PM	0.0d		
A2000	Kick Off	5.0d	19-Oct-20 08:00 AM	23-Oct-20 05:00 PM	0.0d		A2010
A2010	Activity After Kick Off	5.0d	26-Oct-20 08:00 AM	30-Oct-20 05:00 PM	0.0d	A2000	A2020
A2020	Permits	5.0d	02-Nov-20 08:00 AM	06-Nov-20 05:00 PM	0.0d	A2010	A2030
A2030	Land	20.0d	09-Nov-20 08:00 AM	04-Dec-20 05:00 PM	0.0d	A2020	A2040
A2040	Construction	30.0d	07-Dec-20 08:00 AM	15-Jan-21 05:00 PM	0.0d	A2030	A2050
A2050	Closeout	15.0d	18-Jan-21 08:00 AM	05-Feb-21 05:00 PM	0.0d	A2040	

2020

November 2020

December 2020

January 2021

February 2021

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05-Feb-21 05:00 PM

Kick Off

Activity After Kick Off

Permits

Land

Construction

Closeout

USING ACTIVITY IDS TO THE P6 USER'S ADVANTAGE

Now the suffixes of the activities are in order in which the activities are logically linked.

Conclusion

Activity IDs are an important piece in building a standardized and organized project. It can ensure that everyone involved with the project is talking about the same Activity and on the same page. In addition, it can let a P6 User know which phase the Activity belongs to and where it is at within the WBS. Having unique activity IDs can also allow a P6 User to easily find a given activity and create reports for specific Activities.