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Creating a Progress Analysis Graphic with Two P6 Schedules

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Certified P6 Trainer/Implementation Specialist

Monthly Technical Webinar Series
April 2013

ORACLE
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Thank you for joining today's technical webinar

- **Mute** – all call in phones are automatically muted in order to preserve the quality of the audio for all attendees.
- **Questions** – during the session, questions can be submitted through the Questions Box on the right side of the screen . We will try to address your questions at the end of the presentation, time permitting.
- **Follow up** – all registrants will receive an Excel file listing all questions and responses along with a link to the recorded webinar.

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Monthly Technical Webinar Series

April 2013

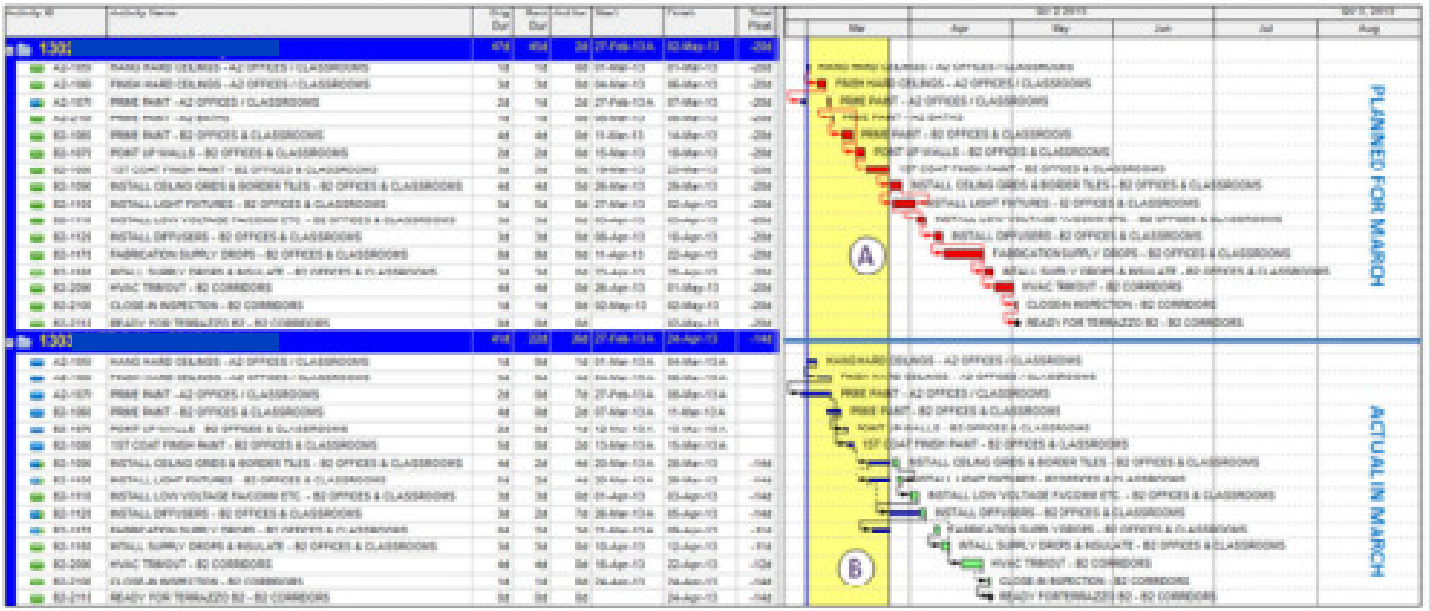
- Characteristics of a Progress Analysis Graphic
- P6 Professional Layout
- P6 Codes and Filters
- Steps to Create the Graphic
- Other Tools Used
- Demonstration
- Other Options
- Summary
- Upcoming Events
- Questions

Schedule Review Report

D. R. McNatty & Associates, Inc.

Client:
Project
Submittal: Schedule Update # 15 – Work Period March 2013

Diagram 1 Analysis of "As Planned" and "Actual" for March 2013



A – The Planned Critical Path for March had Negative Float of -20 Days and forecast the Milestone Activity B2-2110 to complete on May 2nd.

B – The work on the Planned Critical path progressed faster than anticipated, reducing overall path float by 6 days such that the Milestone Activity B2-2110 is now forecast to complete on April 24th.

While the Planned Critical Path for March progressed better than anticipated, there were delays in other paths that are analyzed in Diagram 3.

Characteristics of a Progress Analysis Graphic

Used to communicate technical information to a non-technical audience.

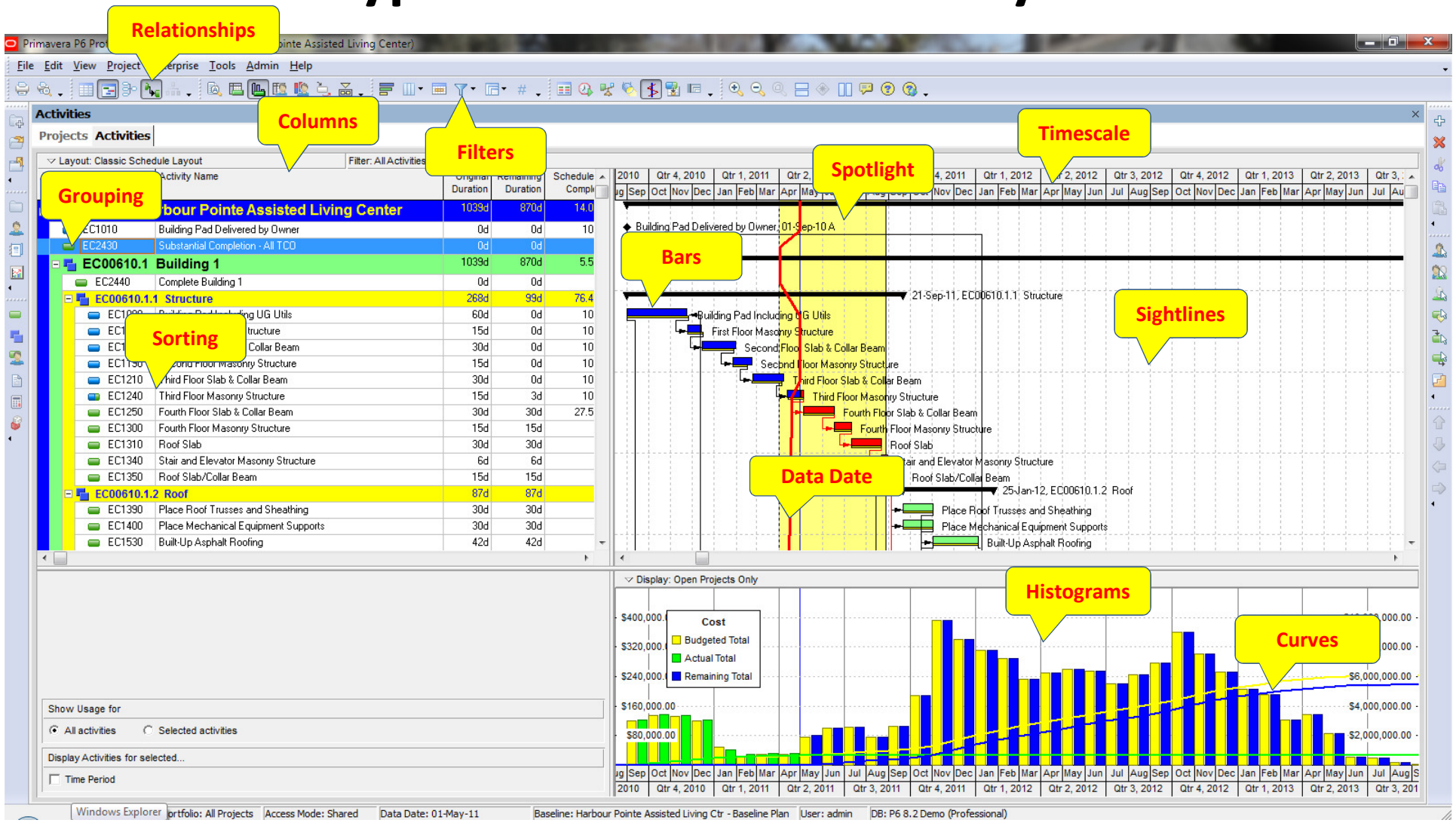
- Includes data from at least two monthly updates
- Limited Topic – don't try to communicate too much
- One page per Topic – or build into complexity through multiple Single Topic Graphics
- Communicate in clear language – avoid acronyms.
- Paste the graphic into the report but it can also be referenced as an attachment
- Use bold colors and text for emphasis
  - Some "emphasis" has to be added outside of P6
  - Use common desk top tools to finalize

P6 Professional Layout

This technique uses the P6 Professional Activity Layout as the foundation of creating the graphic.

- Activity Layout Properties
  1) Can be shared or private
  2) Uses Codes & Filters to organize, select and sort
  3) Table (columns), Bar Chart and Graphic windows
  4) Provides access to all Activity properties
  5) Interactive user interface
  6) Can be printed
  7) Graphic enhancements limited to Curtains & Text
  8) Based on P6 data – not a “freeform” environment

Typical P6 Professional Layout



P6 Codes and Filters

P6 has a great deal of built in functionality to group, sort, filter, organize activities.

- Problems
  1) What was “Critical” in one month may be not be the following month.
  2) “Critical path” often includes redundant or concurrent activities that cause confusion.
  3) Sorting by a Code might be cumbersome to change.
  4) We may need to mix critical and non-critical activities in the same Layout.
- Solution
  1) Use “custom” (User Defined) fields to select, sort, group and annotate.

Customized P6 Professional Layout

Activity ID	Activity Name	Activity % Complete	Start	Finish	Total Float
11-Update # 11 (A) Nov12			14-Nov-12 A	26-Apr-13	-15
E1120	INSTALL WINDOWS	28.57%	14-Nov-12 A	07-Dec-12	-15
E1200	INSTALL STOREFRONT WINDOWS	0%	10-Dec-12	18-Dec-12	-15
E-1140	TEMPORARY WATERTIGHT - C	0%	19-Dec-12	26-Dec-12	-15
12190	HANG DRYWALL	0%	27-Dec-12	16-Jan-13	-15
12200	FINISH DRYWALL	0%	02-Jan-13	21-Jan-13	-15
12220	WOOD TRIM	0%	22-Jan-13	28-Jan-13	-15
12230	POINT-UP	0%	29-Jan-13	30-Jan-13	-15
12240	FIRECAULK PARTITIONS	0%	29-Jan-13	30-Jan-13	-15
12250	PRIME PAINT	0%	31-Jan-13	06-Feb-13	-15
12260	POINT-UP DRYWALL	0%	07-Feb-13	08-Feb-13	-15
12270	2ND COAT	0%	11-Feb-13	15-Feb-13	-15
12280	FINISH PAINT	0%	18-Feb-13	22-Feb-13	-15
12310	CEILING GRID	0%	25-Feb-13	08-Mar-13	-15
12330	SPRINKLER DROPS & HEADS	0%	11-Mar-13	22-Mar-13	-15
12380	CEILING TILE	0%	25-Mar-13	29-Mar-13	-15
90080	PERFORM VERIF TESTING, ADJUSTING & BALANCING	0%	01-Apr-13	26-Apr-13	-15
12-Update # 12 01Jan13			14-Nov-12 A	29-May-13	-36
E1120	INSTALL WINDOWS	100%	14-Nov-12 A	27-Dec-12 A	
E1200	INSTALL STOREFRONT WINDOWS	100%	19-Nov-12 A	14-Dec-12 A	
E-1140	TEMPORARY WATERTIGHT - C	0%	04-Jan-13	11-Jan-13	-24
12190	HANG DRYWALL	10%	10-Dec-12 A	05-Feb-13	-28
12200	FINISH DRYWALL	0%	31-Jan-13	20-Feb-13	-36
12220	WOOD TRIM	0%	20-Feb-13	27-Feb-13	-36
12230	POINT-UP	0%	27-Feb-13	01-Mar-13	-36
12240	FIRECAULK PARTITIONS	0%	27-Feb-13	01-Mar-13	-36
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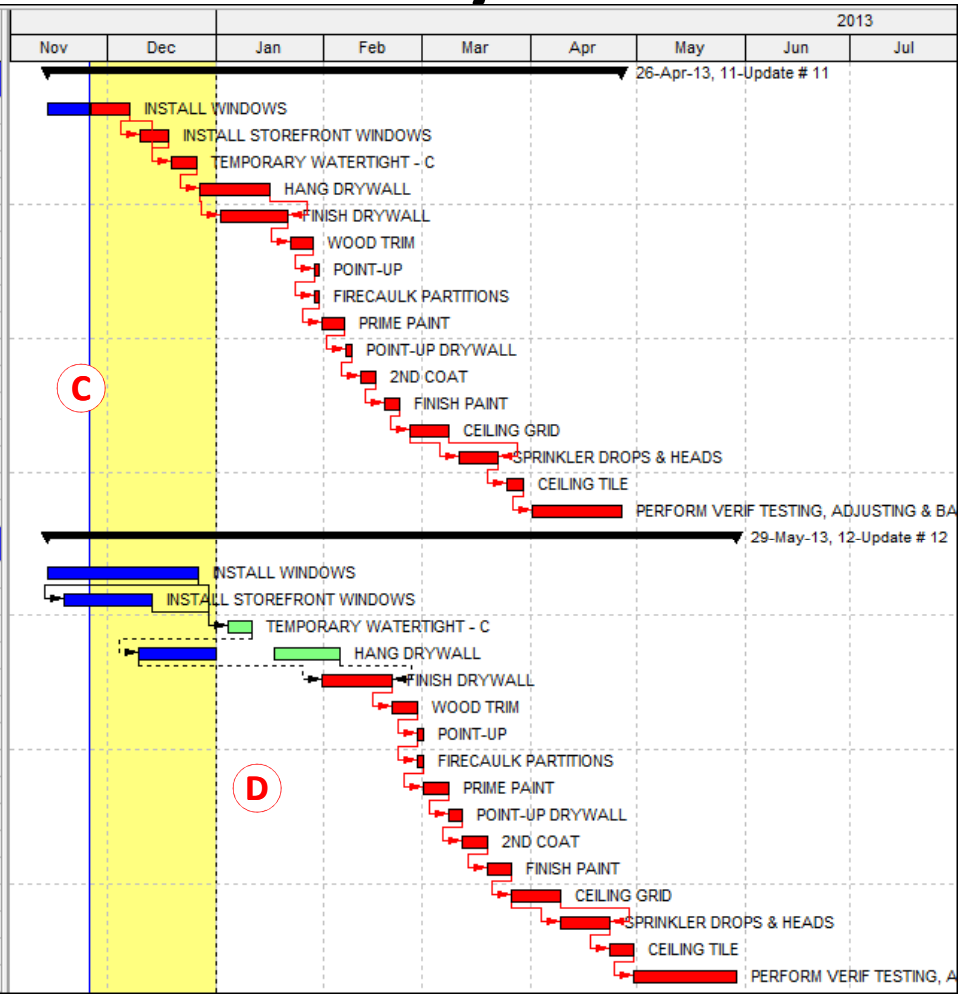

A A SHORTENED "PROJECT NAME" IS USED FOR GROUPING SO THE NAME DOES NOT GET CUT OFF

B THE FILTER SELECTS ONLY SPECIFIC "CRITICAL" ACTIVITIES TO SHOW A CONTINUOUS PATH FOR A LIMITED TIME PERIOD

C THE "SPOTLIGHT" DOES NOT HIGHLIGHT THE ACTIVITIES

D THE BOTTOM PROJECT ACTIVITIES NEED TO BE SORTED EXACTLY IN THE SAME ORDER AS THE TOP PROJECT.

Steps to Create the Graphic

Start with a new or saved P6 Pro Layout. Add columns for UDF's, select activities to be included. Capture and Annotate.

Step	P6	Snagit	Power Point	Word
1	Create a new Layout			
2	Setup Columns			
3	Select Activities			
4	Arrange Activities			
5	Add Curtain/Indicators as needed to communicate			
6		Capture as a Graphic		
7			Create a Power Point Slide	
8			Paste Graphic	
9			Annotate as needed to communicate clearly	
10		Capture as a Graphic		
11		Rotate to Portrait		
12				Paste to Word document

Annotated Custom Layout saved as Graphic

Activity ID	Activity Name	Activity % Complete	Start	Finish	Total Float
11-Update # 11 26Nov12			14-Nov-12 A	26-Apr-13	-15
E1120	INSTALL WINDOWS	28.57%	14-Nov-12 A	07-Dec-12	-15
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12-Update # 12 01Jan13			14-Nov-12 A	29-May-13	-36
E1120	INSTALL WINDOWS	100%	14-Nov-12 A	27-Dec-12 A	
E1200	INSTALL STOREFRONT WINDOWS	100%	19-Nov-12 A	14-Dec-12 A	
E-1140	TEMPORARY WATERTIGHT - C	0%	04-Jan-13	11-Jan-13	-24
12190	HANG DRYWALL	10%	10-Dec-12 A	05-Feb-13	-28
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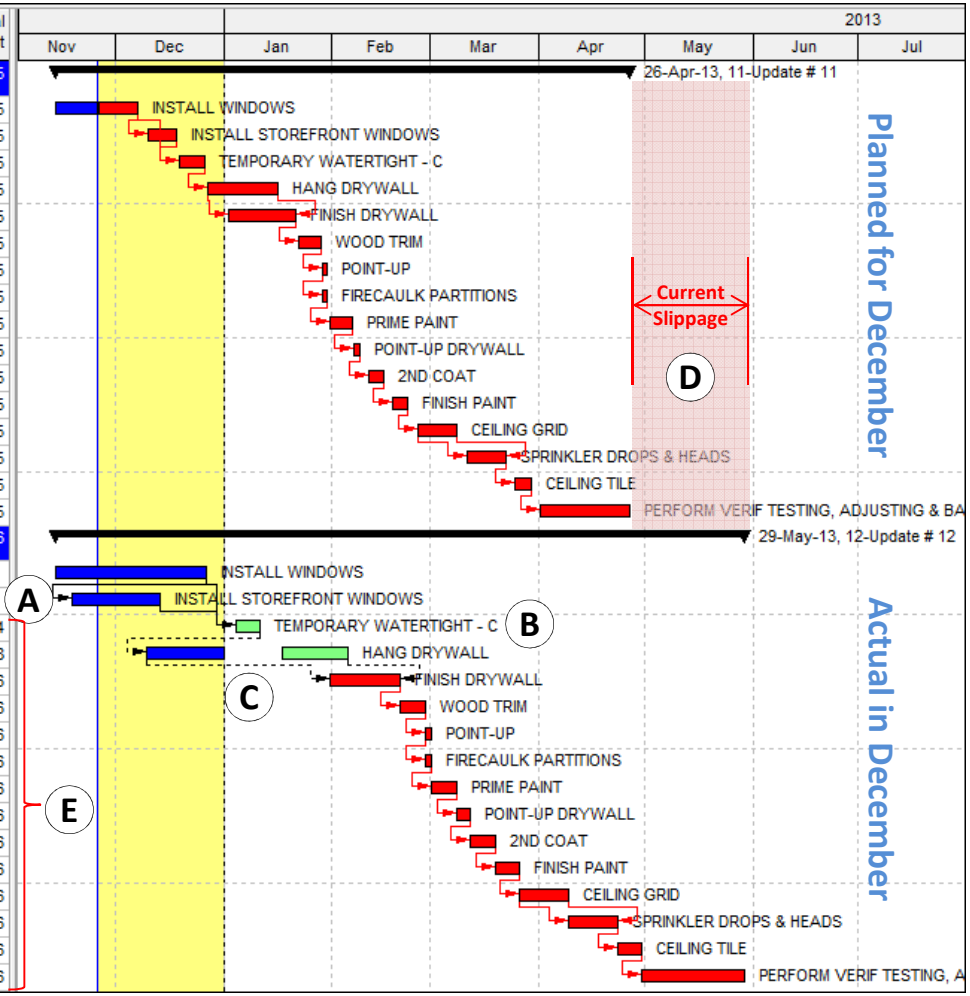

A – Activity E1200 actually started the previous period but was not updated.

B – Activity E-1140 was skipped although the Successor Activity 12190 was not supposed to start until E-1140 was complete.

C – Activity 12190 started out of sequence and the remaining work is being help back (in the schedule) by Activity E-1140.

D – Increased durations and interruptions in progress have caused an additional one month slippage in the project schedule.

E – Total Float on the "Critical path" has increased from -15 to -36 work days, an indication of no progress during the period!

Other Tools Used

Including the P6 Layout in your report requires you to capture the Layout in a graphic format.

- Snagit
  - Captures screen images into a graphic format
  - Let's you rotate to portrait for easy pasting into Word
- Microsoft Power Point
  - Add annotations and comments to the P6 Layout
- Microsoft Word
  - Used to create the final report (Deliverable)

Other tools such as Office Visio, Adobe Illustrator and Captivate, SnapDraw and many others can work just as well.

Demonstration

Switch to P6 Pro and review the steps to set up the P6 environment, create and finalize the graphic.

1. Configure P6 Pro.
2. Open the “target” or original schedule.
3. Configure the Layout.
4. Select and arrange the activities to be analyzed.
5. Open the 2nd (Update) project and repeat Step 4.
6. Snapshot the Layout into Snagit.
7. Copy/Paste into PowerPoint, add annotations.
8. Snapshot the completed slide into Snagit.
9. Rotate to portrait.
10. Paste into Word file.

Other Options

P6 8.3 has other built-in tools.

- P6 EPPM (web) Activities Screen.
  - EPPM only supports XML imports and requires imported schedules to be recalculated – not an option on a Review.
  - You could import XER's to EPPM database and not have to recalculate but you don't have as fine of control over sizing.
- P6 8.3 Visualizer.
  - 8.3 replaces the Time-Scaled-Logic graphic tool with Visualizer which supports Time-Scaled-Logic diagrams and Gantt Charts.
  - However, Visualizer has limited column and filter selection and does not use P6's Layouts or Filters.

Summary

This webinar has described a technique that would not be taught in any standard product classes and also reflects the authors perspective on using these tools to communicate more clearly to non-technical audiences.

- P6 User Defined Fields
- Manual, direct control of filtering, sorting and grouping
- Using the best available tools in a simple and straight-forward way.
- Using a graphic presentation to help the message be more easily understood.

We hope that you have found this webinar useful.

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