



PROJECT MANAGEMENT SOLUTIONS THAT *SIMPLY WORK* SINCE 1989.

Oracle Primavera P6 User Forum

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www.drmcnatty.com



Thank you for joining today's 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.

Safe Harbor

- The statements made in this technical presentation are based on our current knowledge of the tools.
- Our statements should not be construed to be an official “Vendor perspective”, but are intended to be the sharing of technical and user knowledge gained as we explore new paths and technologies, usually in advance of our clients.
- You need to make your own judgments as to the application of our shared ideas in your own, unique environment.

Products and Services

- Project Controls System Implementation
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- Integration, Analytics, Dashboards, Risk and Role-based User Access Tools
- Program and Project System Support Services and Partnering
- Mentored and Supported SB/DVBE Project Staffing Resources

Agenda

P6 User Forum

- The purpose of the P6 User Forum is to engage the P6 community to improve efficiency and use of P6.
- Attendees are welcome to continue to submit their questions that may be used in future DRMcNatty webinars.
- Comments and suggestions are welcome.

Question #1

How can we interpret resource loadings (period-based table) from a schedule already in progress containing negative float? Loadings do not seem to make sense if negative float exists in a schedule

Activity ID	Activity Name	Original Duration	Start	Finish	Total Float	Apr 16							Apr 23							Apr 30							May 07						
						W	Th	Fri	Sat	Sun	M	Tue	W	Th	Fri	Sat	S	M	Tue	W	Th	Fri	Sat	Sun	M	Tue	W	Th	Fri				
	P6 User Forum - Resource Display	5d	24-Apr-17 A	08-May-17	-9d																												
A1000	New Activity	5d	24-Apr-17 A	08-May-17	-9d	24-Apr-17 A														08-May-17													
▼ Display: Current Project's ...						▼ Display: Activity Resource Assignments						▼ Display: Open Projects Only																					
Resource Name		Activity ID		Activity Name		Resource ID Name		Budgeted Units		Apr 23							Apr 30							May 07									
										Sun	M	Tue	W	Th	Fri	Sat	S	M	Tue	W	Th	Fri	Sat	Sun	M	Tue	W	Th	Fri				
Electrician		New Activity								8h 8h 8h 8h 8h																							
		A1000 New Activity		Elec.Electrician						8h 8h 8h 8h 8h																							

Question #1 – Answer

Check the “Planned Dates” for the activity(s) in question.

Activity ID	Activity Name	Original Duration	Start	Finish	Total Float	Planned Start	Planned Finish	Apr 16							Apr 23							Apr 30							May 07						
								W	Th	Fri	Sat	Sun	Mon	Tue	W	Th	Fri	Sat	Sun	Mon	Tue	W	Th	Fri	Sat	Sun	Mon	Tue	W	Th					
P6 User Forum - Resource Display		5d	24-Apr-17 A	08-May-17	-9d	24-Apr-17	28-Apr-17																												
A1000	New Activity	5d	24-Apr-17 A	08-May-17	-9d	24-Apr-17	28-Apr-17	24-Apr-17 A <div><div></div><div></div></div> 08-May-17																											

Display: Current ...						Display: Activity Resource Assignments						Display: Open Projects Only																				
Resource Name	Activity ID	Activity Name	Resource ID Name	Start	Finish	Budgeted Units																										
						at	Sun	Mon	Tue	W	Th	Fri	Sat	Sun	Mon	Tue	W	Th	Fri	Sat	Sun	Mon	Tue	W	Th	Fri	Sat	Sun	Mon	Tue	W	Th
Electrician	New Activity			24-Apr-17 A	08-May-17	8h 8h 8h 8h 8h																										
	A1000	New Activity	Elec. Electrician	24-Apr-17 A	08-May-17	8h 8h 8h 8h 8h																										

Resource spreadsheets and histograms will display budgeted resource information in accordance with the **Planned Dates** for activities.

Planned Dates are initially generated from the calculated early dates. They match the early dates exactly as long as the activity does not register an Actual Start

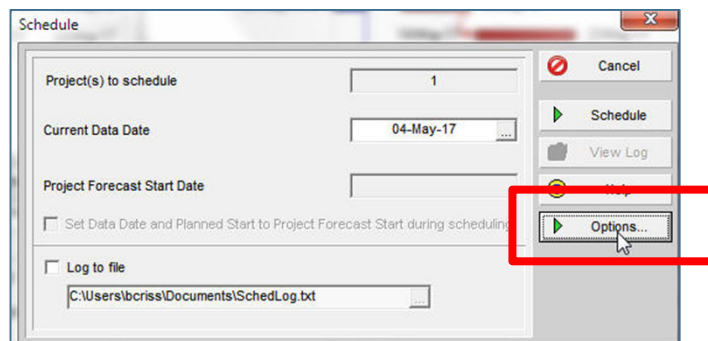
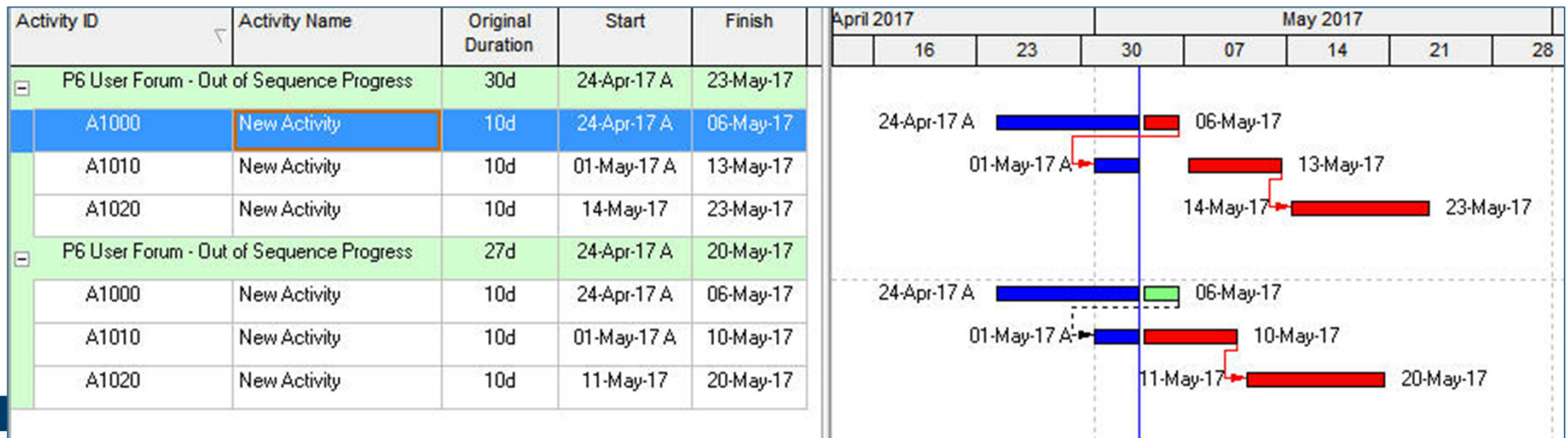
[illegible][illegible]

Once actual start is given to activity....Planned Start is frozen at that specific date.

Once activity starts, Planned Finish will equal the Planned Start plus the Original Duration.

Question #2

What is the best way to handle out-of-sequence progressing? Should the schedule logic not be changed to eliminate the out-of-sequence activities? What is best practice?



Top = Retained Logic Method

Bottom = Progress Override Method

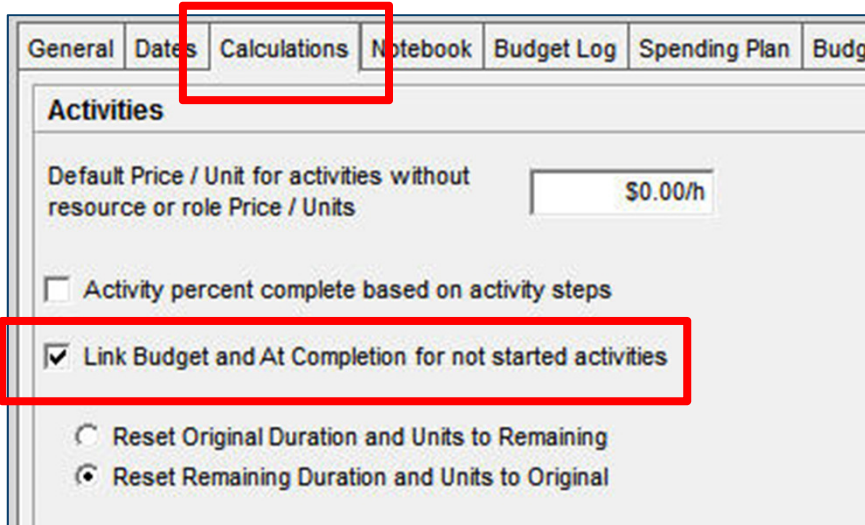
Question #2 - Answer

What is the best way to handle out-of-sequence progressing? Should the schedule logic not be changed to eliminate the out-of-sequence activities? What is best practice?

- Considerations:
 - Are there contract provisions or specifications that preclude changing logical relationships?
 - Does your company have policy related to out-of-sequence progress and what to do?
 - Points of view will vary on this topic.
- Opinion:
 - Update logical relationships to reflect the current progress plan for the work. At the end we will have “actual” logic.

Question #3

Occasionally I import MS Project Files into P6. Upon doing so, if I change my Original Duration, I have to manually change the Remaining Duration to equal the Original Duration. When creating a file in P6, the Rem Dur duration changes automatically when adjusting Orig Dur. This occurs for Planned activities.



In the Project Details, select the "Calculations" tab and check the box for "Link Budget and At Completion for not started activities."

Question #4

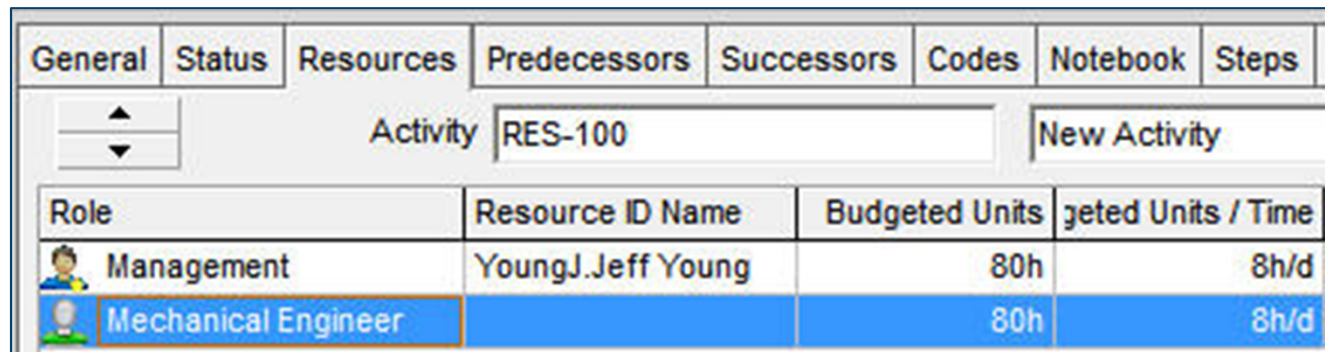
What are the implications of using Roles instead of resources from start to finish of a project and would any special configuration etc be needed to implement?



- Roles – Primarily designed for future planning or project requirements.
 - **Typically noted as titles or skill sets.**
- Resources – Required for the completion of activities.
 - **Labor, Non-Labor, Materials**
 - **May be individuals or crews**

Question #4 - Answer

What are the implications of using Roles instead of resources from start to finish of a project and would any special configuration etc be needed to implement?

- Roles as well as Resources in P6 utilize the same columns and fields at the activity level. So in this regard, they are similar in the type of information that can be entered and reported.
- Both Roles and Resources are Global and hierarchical.
- The primary differences are what data is used to set them up in the P6 dictionary.



General	Status	Resources	Predecessors	Successors	Codes	Notebook	Steps	F
		Activity RES-100		New Activity				
Role	Resource ID Name	Budgeted Units	udgeted Units / Time					
 Management	YoungJ.Jeff Young	80h	8h/d					
 Mechanical Engineer		80h	8h/d					

Question #4 - Answer


What are the implications of using Roles instead of resources from start to finish of a project and would any special configuration etc be needed to implement?

P6 Function	Resources	Roles
Assign Budget Cost, Units at Activity Level	YES	YES
Utilize Curves and Cost Accounts	YES	YES
Utilize Codes	YES	NO
Specific Calendars	YES	NO
Time Distributed (Histograms / Spreadsheets)	YES	YES
Shifts	YES	NO
Labor, Materials, Equipment	YES	NO
Group / Filter / Sort	YES	YES
Bucket Planning (Resource Assignment View)	YES	YES

Question #5

Is there an alternative way to cost load a schedule without using Roles or Resources for some or all of the activities?

- **Answer = Expenses**

General	Status	Resources	Predecessors	Successors	Codes	Notebook	Steps	Feedback	WPs & Docs	Expenses	Summary
		Activity RES-100		New Activity							
Expense Item	Cost Account	Expense Category	Accrual Type	Budgeted Cost	Actual Cost	Remaining Cost	Completion Cost				
 Budget			Uniform over Activi	\$5,000.00	\$0.00	\$5,000.00	\$5,000.00				

- Considerations for Expenses
 - **No Curves (All at Start or Finish – or – Uniform over Activity)**
 - **Do not automatically update based on % Complete when updating activities manually (Update Progress is different)**
 - **Easy to work with...no Global Dictionary required for Expenses.**
 - **Project Specific in P6**

Question #6

How do you eliminate space between text in headers and footers?

The screenshot shows the 'Page Setup' dialog box with the 'Footer' tab selected. The 'Divide Into' is set to 3 sections, 'Include on' is 'All Pages', and 'Height' is 0.5. The 'Define footer' section has 'Show Section Divider Lines' checked. The footer is divided into three sections: 'Section 1 (33%)' containing 'Gantt Chart Legend', 'Section 2 (33%)' containing 'Text/Logo', and 'Section 3 (33%)' containing 'Text/Logo'. The 'Add Text' section shows a text area with '[filter_list]' and '© Oracle Corporation'. The 'Add' button is visible at the bottom right of the text area.

Section 1 (33%)	Section 2 (33%)	Section 3 (33%)
Gantt Chart Legend	Text/Logo	Text/Logo

Question #7

Are time periods for period reporting apply to specific projects or to all projects globally.

The screenshot shows a software window titled "Financial Periods". On the left, the "Batch Create Financial Periods" section contains the following settings:

- Last Period End Date: 31-Dec-21
- Batch Start Date: 01-Jan-22 (Saturday)
- Batch End Date: 28-Jan-22 (Friday)
- Financial Period:
 - ☒ Every 4 Weeks
 - ☐ Every 3 Months
 - ☐ Every Year
- Period Ends On: Saturday
- Batch Create button

On the right, the "Display: Financial Periods" section shows a table of periods:

Period Name	Start Date	End Date
2010-07-01	01-Jul-10	31-Jul-10
2010-08-01	01-Aug-10	31-Aug-10
2010-09-01	01-Sep-10	30-Sep-10
2010-10-01	01-Oct-10	31-Oct-10
2010-11-01	01-Nov-10	30-Nov-10
2010-12-01	01-Dec-10	31-Dec-10
2011-01-01	01-Jan-11	31-Jan-11
2011-02-01	01-Feb-11	28-Feb-11
2011-03-01	01-Mar-11	31-Mar-11
2011-04-01	01-Apr-11	30-Apr-11
2011-05-01	01-May-11	31-May-11
2011-06-01	01-Jun-11	30-Jun-11
2011-07-01	01-Jul-11	31-Jul-11
2011-08-01	01-Aug-11	31-Aug-11
2011-09-01	01-Sep-11	30-Sep-11
2011-10-01	01-Oct-11	31-Oct-11
2011-11-01	01-Nov-11	30-Nov-11

On the far right, there are buttons for Close, Add, Delete, and Help.

Global Only...Not Project Specific

Question #8 ...#9

#8 - Is there a way to increase the number of characters available for the names of Layouts?

- **Answer = No**

#9 - Is there a way to permanently alter column widths in dialog boxes? The issue is this: column widths in many dialog boxes obscure content because they are too narrow, forcing us to adjust them to usable widths every time we use them.

An example is the box from which you select an EPS node when importing a project. It would be great if P6 would “remember” those adjustments so we would not have to repeat them every time. This also applies to the Codes detail window. Column width adjustments are not remembered.

- **Answer = Sometimes???**

Question #10

When the cursor is in a code or WBS field, and there is a code or WBS assigned, is there a way to get P6 to recognize that assignment in the code or WBS structure?

The issue: say I am in an activity's General detail window and in the WBS field, and want to adjust the WBS assignment one level up or down. For whatever reason, I am not allowed to just edit the field, so I must click the icon to "Select WBS".

In the good ol' P3 days, the software would automatically go to the existing assignment in the WBS structure, making small adjustments easy. P6, however, goes to the top of the WBS structure, and forces you to scroll through, in many cases, hundreds of lines of the WBS structure to get to the proper location.

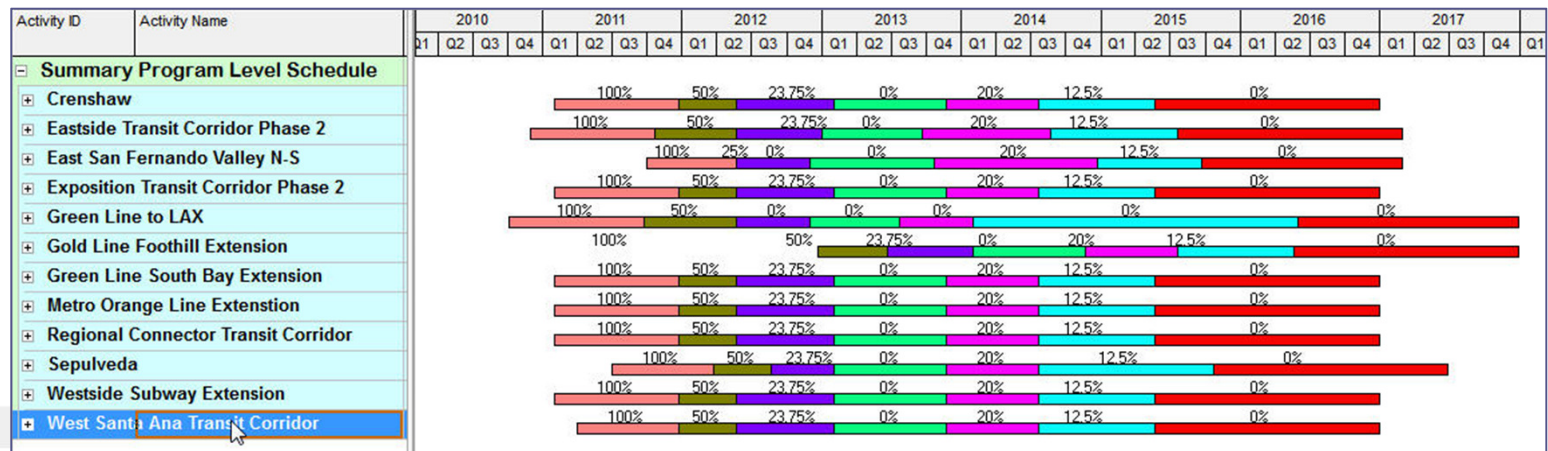
Why can't the default be the existing assignment as in P3? This also applies to activity code fields.

Question #11

There used to be a way to do a bar chart where all the bars could be placed on one line.

For example, I have a summary bar chart of a project with four phases using the WBS levels. Currently the bar chart has five lines to show project (subtotal as a subtotal), planning, design, construction, post construction (the four bars). With P3, it was possible to place the planning, design, construction, and post construction bars on one line instead of separate lines.

Is this possible in P6?



Question #12

Global Change of Activity Resource Assignments will not let you set resource durations; is there another way to do this?

True: No option exists to perform a global change that will modify Original Duration (or Remaining Duration) on Resource Assignments.

Option: Add columns in Resource Assignments View and Fill Down.

Question #13

Sometimes an activity's start and finish time no longer comes out as 8:00 am to 5:00 pm (assuming the settings are for an 8 hour day and that the schedule should be in days) and subsequent activities that are supposed to have a one day duration are calculating as two days because the start time is 4:00pm and the finish time is 4:00pm the next day.

How can this be fixed?

Activity ID	Activity Name	Original Duration	Start	Finish
P6 Calendars - Single Day Activities		12d	25-Apr-17	06-May-17
A1000	New Activity	4d	25-Apr-17	28-Apr-17
A1010	New Activity	1d	28-Apr-17	01-May-17
A1020	New Activity	5d	02-May-17	06-May-17

Question #13 - Answer

Check for (and modify as needed) the detailed hours in the assigned calendars for activities.

Global Calendar: Standard 5 Day w/ Basic Holidays (G)

☐ Total work hours/day ☒ Detailed work hours/day

< April 2017 >

Sun	Mon	Tue	Wed	Thr	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Work hours

	:00-:30	:30-:60
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		

OK Cancel Help Work Nonwork Standard Workweek... Time Periods

Standard ☐ Nonwork ☐ Exception ☐

Inherit holidays and exceptions from Global Calendar:
<None>

Edit Detailed Work hours to align daily work periods

Questions & Comments

- All questions are gathered into a master sheet, answered and distributed to all registrants as well as posted on our website.
- Answers are based on our own experiences using the various software products covered in this webinar.

Thank you for participating

Contact - contact@drmcnatty.com

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