PLANNING AND CONTROL USING ORACLE® PRIMAVERA® P6 VERSIONS 18 to 23 PPM PROFESSIONAL

Planning and Progressing Project Schedules With and Without Roles and Resources in an Established Database

BY PAUL EASTWOOD HARRIS
Planning and Control Using Oracle® Primavera® P6 Versions 18 to 23 PPM Professional

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Please send any comments on this publication to the author.

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INTRODUCTION

This publication is an upgrade of the authors original publication Project Planning & Control Using Primavera P6 Version 7 and has been written to enable new users to learn the planning and scheduling functions of Primavera 18, 19, 20, 21, 22 and 23. Please note there are no versions 9 to 14 and Oracle changed their naming convention with the release of 15.1 so the name is the same as the year of the release.

Many users will have prior experience with Elecosoft (Asta) Powerproject or Microsoft Project and the author explains where there are differences in the products’ functionality.

The author would appreciate any constructive comments on how this publication may be improved.

SUMMARY

The publication may be used as:

- A training manual for a three-day training course, or
- A self-teach book, or

The screen shots for this publication are mainly taken from Primavera Versions 18 or 19 or 20 or 21 or 22 or 23. Screen shots from earlier versions are used when required for demonstrating differences in versions.

One-day, two-day, or three-day training courses may be run using this publication and it includes exercises for the students to complete at the end of each chapter. After the course, students may use this publication as a reference book. Instructors’ PowerPoint presentations are available from Eastwood Harris web sites.

This publication is ideal for people who would like to quickly gain an understanding of how the software operates and explains how the software differs from Elecosoft Powerproject and Microsoft Project, thus making it ideal for people who wish to convert from these products.

CUSTOMIZATION FOR TRAINING COURSES

Training organizations or companies that wish to conduct their own training may have this publication tailored to suit their requirements. This may be achieved by removing, reordering or adding content to the publication and by writing their own exercises. Please contact the author to discuss this service.

AUTHOR’S COMMENT

As a project controls consultant, I have used a number of planning and scheduling software packages for the management of a range of project types and sizes. The first publications I published were user guides/training manuals for Primavera SureTrak, P3 and Microsoft Project users. These were well received by professional project managers and schedulers, so I decided to turn my attention to Primavera Enterprise, which is now called Primavera P6. This publication follows the same proven layout of my previous publications. I trust this publication will assist you in understanding how to use Primavera P6 on your projects.

APPRECIATION

I would like thank Michael Jack for his assistance in writing this book and Thomas Grant for his assistance in proof reading parts of the book.
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## 1 INTRODUCTION

1.1 Purpose

1.2 Required Background Knowledge

1.3 Purpose of Planning

1.4 Project Planning Metrics

1.5 Planning Cycle

1.6 Levels of Planning

1.7 Monitoring and Controlling a Project

## 2 CREATING A PROJECT PLAN

2.1 Understanding Planning and Scheduling Software

2.2 Enterprise Project Management

2.3 Understanding Your Project

2.4 Level 1 – Planning Without Resources

2.4.1 Creating Projects

2.4.2 Defining the Calendars

2.4.3 Defining the Project Breakdown Structures

2.4.4 Adding Activities

2.4.5 Adding the Logic Links

2.4.6 Developing a Closed Network

2.4.7 Scheduling the Project

2.4.8 Critical Path

2.4.9 Total Float

2.4.10 Free Float

2.4.11 Relationship Colors

2.4.12 Constraint Types

2.4.13 Project Constraints

2.4.14 Activity Constraints

2.4.15 Risk Analysis

2.4.16 Contingent Time

2.4.17 Formatting the Display – Layouts and Filters

2.4.18 Printing and Reports

2.4.19 Issuing the Plan

2.5 Level 2 – Monitoring Progress Without Resources

2.5.1 Setting the Baseline

2.5.2 Tracking Progress

2.5.3 Corrective Action

2.6 Level 3 – Scheduling with Resources, Roles and Expenses

2.6.1 Estimating or Planning for Control

2.6.2 The Balance Between the Number of Activities and Resources

2.6.3 Creating and Using Resources

2.6.4 Creating and Using Roles

2.6.5 The Relationship Between Resources and Roles

2.6.6 Using Roles and Resources

2.6.7 Activity Type and Duration Type

2.6.8 Budgets

2.6.9 Resource Usage Profiles and Tables

2.6.10 Resource Optimization

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Planning and Control Using Oracle® Primavera® P6 Versions 18 to 23 PPM Professional

2.7 Level 4 – Monitoring and Controlling a Resourced Schedule 21
2.7.1 Monitoring Projects with Resources 21
2.7.2 Controlling a Project with Resources 21

3 STARTING UP AND NAVIGATION 22
3.1 Logging In 24
3.2 The Projects Window 26
3.2.1 Project Window Top Pane 26
3.2.2 Project Window Bottom Pane Details Tab 27
3.3 Opening One or More Projects 27
3.4 Displaying the Activities Window 29
3.5 Opening a Portfolio 30
3.6 Introduction to Layouts 30
3.7 Customizing Toolbars 33
3.7.1 Customizable Toolbars 33
3.7.2 Customizable menus 35
3.7.3 Status Bar 35
3.8 User Preferences 36
3.8.1 Time Unit Formatting 36
3.8.2 Date Formatting 36
3.8.3 Users may See and Set Activity Start and Finish Times in the Date Picker box 37
3.9 Starting Day of Week 38
3.10 Admin Preferences – Set Industry Type 39
3.11 Application of Options within Forms 41
3.12 Do Not Ask Me About This Again 42
3.13 Right-clicking with the Mouse 42
3.14 Accessing Help 42
3.15 Refresh Data – F5 Key 44
3.16 Commit Changes – F10 Key 44
3.17 Send Project 44
3.18 Closing Down 44
3.19 Workshop 1 – Navigating Around the Windows 45

4 CREATING A NEW PROJECT 51
4.1 Creating a Blank Project 51
4.2 Copy an Existing Project 52
4.3 Importing a Project and Project Data 53
4.3.1 Primavera File Types 53
4.3.2 Non Primavera File Types 54
4.4 Setting Up a New Project 55
4.5 Project Dates 56
4.6 Saving Additional Project and EPS Information – Notebook Topics 57
4.7 Workshop 2 – Creating Your Project 58

5 DEFINING CALENDARS 60
5.1 Database Default Calendar 61
5.2 Accessing Global and Project Calendars 61
5.3 The Project Default Calendar 61
5.3.1 Understanding the Project Default Calendar 61
5.3.2 Assigning a Default Project Calendar 62
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.4</td>
<td>Creating a New Global or Project Calendar</td>
<td>62</td>
</tr>
<tr>
<td>5.5</td>
<td>Resource Calendars</td>
<td>63</td>
</tr>
<tr>
<td>5.5.1</td>
<td>Creating a New Shared Resource Calendar</td>
<td>63</td>
</tr>
<tr>
<td>5.5.2</td>
<td>Creating New Personal Resource Calendars</td>
<td>63</td>
</tr>
<tr>
<td>5.5.3</td>
<td>Personal and Shared Calendars Calculation and Display</td>
<td>65</td>
</tr>
<tr>
<td>5.6</td>
<td>Move, Copy, Rename and Delete a Calendar</td>
<td>65</td>
</tr>
<tr>
<td>5.6.1</td>
<td>Moving a Project Calendar to Global</td>
<td>65</td>
</tr>
<tr>
<td>5.6.2</td>
<td>Copy a Calendar from One Project to Another</td>
<td>66</td>
</tr>
<tr>
<td>5.6.3</td>
<td>Renaming a Calendar</td>
<td>66</td>
</tr>
<tr>
<td>5.6.4</td>
<td>Deleting a Calendar</td>
<td>66</td>
</tr>
<tr>
<td>5.7</td>
<td>Editing Calendar Working Days</td>
<td>66</td>
</tr>
<tr>
<td>5.8</td>
<td>Inherit Holidays and Exceptions from a Global Calendar</td>
<td>67</td>
</tr>
<tr>
<td>5.9</td>
<td>Adjusting Calendar Working Hours</td>
<td>68</td>
</tr>
<tr>
<td>5.9.1</td>
<td>Editing Calendar Weekly Hours</td>
<td>68</td>
</tr>
<tr>
<td>5.9.2</td>
<td>Editing Selected Days Working Hours</td>
<td>69</td>
</tr>
<tr>
<td>5.9.3</td>
<td>Editing Detailed Work Hours/Day</td>
<td>69</td>
</tr>
<tr>
<td>5.10</td>
<td>Calculation of Activity Durations in Days, Weeks or Months</td>
<td>70</td>
</tr>
<tr>
<td>5.11</td>
<td>Calendars for Calculating Project, WBS and Other Summary Durations</td>
<td>72</td>
</tr>
<tr>
<td>5.12</td>
<td>Tips for Mixed Calendar Schedules</td>
<td>73</td>
</tr>
<tr>
<td>5.13</td>
<td>Elapsed Duration Activities</td>
<td>74</td>
</tr>
<tr>
<td>5.14</td>
<td>P6 Calendar Issues</td>
<td>74</td>
</tr>
<tr>
<td>5.15</td>
<td>Workshop 3 – Maintaining the Calendars</td>
<td>75</td>
</tr>
<tr>
<td>6</td>
<td>CREATING A PRIMAVERA PROJECT WBS</td>
<td>77</td>
</tr>
<tr>
<td>6.1</td>
<td>Opening and Navigating the WBS Window</td>
<td>78</td>
</tr>
<tr>
<td>6.2</td>
<td>Creating and Deleting a WBS Node</td>
<td>79</td>
</tr>
<tr>
<td>6.3</td>
<td>WBS Node Separator</td>
<td>80</td>
</tr>
<tr>
<td>6.4</td>
<td>Work Breakdown Structure Lower Pane Details</td>
<td>80</td>
</tr>
<tr>
<td>6.5</td>
<td>WBS Categories</td>
<td>81</td>
</tr>
<tr>
<td>6.6</td>
<td>Displaying the WBS in the Activity Window</td>
<td>82</td>
</tr>
<tr>
<td>6.7</td>
<td>Why a Primavera WBS is Important</td>
<td>82</td>
</tr>
<tr>
<td>6.8</td>
<td>Workshop 4 – Creating the Work Breakdown Structure</td>
<td>83</td>
</tr>
<tr>
<td>7</td>
<td>ADDING ACTIVITIES AND ORGANIZING UNDER THE WBS</td>
<td>85</td>
</tr>
<tr>
<td>7.1</td>
<td>New Activity Defaults</td>
<td>86</td>
</tr>
<tr>
<td>7.1.1</td>
<td>Duration Type</td>
<td>86</td>
</tr>
<tr>
<td>7.1.2</td>
<td>Percent Complete Type</td>
<td>86</td>
</tr>
<tr>
<td>7.1.3</td>
<td>Activity Types and Milestones</td>
<td>88</td>
</tr>
<tr>
<td>7.1.4</td>
<td>Cost Account</td>
<td>89</td>
</tr>
<tr>
<td>7.1.5</td>
<td>Calendar</td>
<td>89</td>
</tr>
<tr>
<td>7.1.6</td>
<td>Auto-numbering Defaults</td>
<td>90</td>
</tr>
<tr>
<td>7.2</td>
<td>Adding New Activities</td>
<td>90</td>
</tr>
<tr>
<td>7.3</td>
<td>Default Activity Duration</td>
<td>91</td>
</tr>
<tr>
<td>7.4</td>
<td>Copying Activities from other Programs</td>
<td>91</td>
</tr>
<tr>
<td>7.5</td>
<td>Copying Activities in P6</td>
<td>91</td>
</tr>
<tr>
<td>7.6</td>
<td>Renumbering Activity IDs</td>
<td>92</td>
</tr>
<tr>
<td>7.7</td>
<td>Elapsed Durations</td>
<td>93</td>
</tr>
<tr>
<td>7.8</td>
<td>Finding the Bars in the Gantt Chart</td>
<td>93</td>
</tr>
<tr>
<td>7.9</td>
<td>Activity Information – Bottom Layout</td>
<td>93</td>
</tr>
</tbody>
</table>
7.10 Assigning Calendars to Activities  
7.10.1 Assigning a Calendar Using General Tab of the Bottom Layout Form  
7.10.2 Assigning a Calendar Using a Column  
7.11 Assigning Activities to a WBS Node  
7.12 Reordering or Sorting Activities  
7.13 Undo  
7.14 Summarizing Activities Using WBS  
7.15 Spell Check  
7.16 Workshop 5 – Adding Activities  

8 FORMATTING THE DISPLAY  
8.1 Formatting the Project Window  
8.2 Understanding Forms  
8.3 Formatting the Bars  
8.3.1 Formatting Activity Bars  
8.3.2 Formatting Bars Issues  
8.3.3 Bar Style Tab  
8.3.4 Bar Settings Tab  
8.3.5 Bar Labels Tab  
8.3.6 Bar Chart Options Form  
8.4 Progress Line Display on the Gantt Chart  
8.5 Formatting Columns  
8.5.1 Selecting the Columns to be Displayed  
8.5.2 Column Header Alignment  
8.5.3 Adjusting the Width of Columns  
8.5.4 Setting the Order of the Columns from Left to Right on the Screen  
8.6 Row Height and Show Icon  
8.7 Format Timescale  
8.7.1 Moving and Rescaling the Timescale  
8.7.2 Format Timescale Command  
8.7.3 Nonwork Period Shading in Timescale  
8.8 Inserting Attachments – Text Boxes and Curtain  
8.8.1 Adding and Deleting a Text Box  
8.8.2 Adding and Deleting a Curtain  
8.9 Format Fonts and Font Colors  
8.10 Format Colors  
8.11 Line Numbers  
8.12 Workshop 6 – Formatting the Bar Chart  

9 ADDING RELATIONSHIPS  
9.1 Understanding Logic  
9.2 Understanding Relationships  
9.3 Understanding Lags and Leads  
9.4 Formatting the Relationships  
9.5 Adding and Removing Relationships  
9.5.1 Graphically Adding and Deleting a Relationship  
9.5.2 Graphically Deleting a Relationship  
9.5.3 Adding and Deleting Relationships with the Activity Details Form  
9.5.4 Adding and Deleting Relationships Using Columns  
9.5.5 Chain Linking  
9.5.6 Using the Assign Toolbar Icons to Assign Relationships
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.6</td>
<td>Dissolving Activities and Retain Lag</td>
<td>133</td>
</tr>
<tr>
<td>9.7</td>
<td>Circular Relationships</td>
<td>134</td>
</tr>
<tr>
<td>9.8</td>
<td>Scheduling the Project</td>
<td>135</td>
</tr>
<tr>
<td>9.9</td>
<td>Reviewing Relationships, Leads and Lags</td>
<td>136</td>
</tr>
<tr>
<td>9.10</td>
<td>Lag and Relationship Type Displayed in the Activity Table</td>
<td>136</td>
</tr>
<tr>
<td>9.11</td>
<td>Ladder Scheduling</td>
<td>137</td>
</tr>
<tr>
<td>9.12</td>
<td>Relationship Comments</td>
<td>137</td>
</tr>
<tr>
<td>9.13</td>
<td>Milestone Reduced Relationship Types</td>
<td>139</td>
</tr>
<tr>
<td>9.14</td>
<td>Workshop 7 – Adding the Relationships</td>
<td>140</td>
</tr>
<tr>
<td>10</td>
<td>ACTIVITY NETWORK VIEW</td>
<td>142</td>
</tr>
<tr>
<td>10.1</td>
<td>Viewing a Project Using the Activity Network View</td>
<td>143</td>
</tr>
<tr>
<td>10.2</td>
<td>Adding and Deleting Activities</td>
<td>143</td>
</tr>
<tr>
<td>10.2.1</td>
<td>Adding an Activity</td>
<td>143</td>
</tr>
<tr>
<td>10.2.2</td>
<td>Deleting and Activity</td>
<td>143</td>
</tr>
<tr>
<td>10.3</td>
<td>Adding, Editing and Deleting Relationships</td>
<td>143</td>
</tr>
<tr>
<td>10.3.1</td>
<td>Graphically Adding a Relationship</td>
<td>143</td>
</tr>
<tr>
<td>10.3.2</td>
<td>Using the Activity Details Form</td>
<td>143</td>
</tr>
<tr>
<td>10.4</td>
<td>Formatting the Activity Boxes</td>
<td>144</td>
</tr>
<tr>
<td>10.5</td>
<td>Reorganizing the Activity Network</td>
<td>144</td>
</tr>
<tr>
<td>10.6</td>
<td>Saving and Opening Activity Network Positions</td>
<td>144</td>
</tr>
<tr>
<td>10.7</td>
<td>Early Date, Late Date and Float Calculations</td>
<td>145</td>
</tr>
<tr>
<td>10.8</td>
<td>Workshop 8 – Scheduling Calculations and Activity Network View</td>
<td>146</td>
</tr>
<tr>
<td>11</td>
<td>CONSTRAINTS</td>
<td>148</td>
</tr>
<tr>
<td>11.1</td>
<td>Assigning Constraints</td>
<td>150</td>
</tr>
<tr>
<td>11.1.1</td>
<td>Number of Constraints per Activity</td>
<td>150</td>
</tr>
<tr>
<td>11.1.2</td>
<td>Setting a Primary Constraint Using the Activity Details Form</td>
<td>150</td>
</tr>
<tr>
<td>11.1.3</td>
<td>Setting a Secondary Constraint Using the Activity Details Form</td>
<td>150</td>
</tr>
<tr>
<td>11.1.4</td>
<td>Expected Finish Constraint</td>
<td>151</td>
</tr>
<tr>
<td>11.1.5</td>
<td>Setting Constraints Using Columns</td>
<td>151</td>
</tr>
<tr>
<td>11.1.6</td>
<td>Typing in a Start Date</td>
<td>151</td>
</tr>
<tr>
<td>11.2</td>
<td>External Dates</td>
<td>152</td>
</tr>
<tr>
<td>11.3</td>
<td>Project Must Finish By Date</td>
<td>152</td>
</tr>
<tr>
<td>11.4</td>
<td>Activity Notebook</td>
<td>153</td>
</tr>
<tr>
<td>11.4.1</td>
<td>Creating Notebook Topics</td>
<td>154</td>
</tr>
<tr>
<td>11.4.2</td>
<td>Adding Notes</td>
<td>154</td>
</tr>
<tr>
<td>11.5</td>
<td>Check Schedule Report</td>
<td>155</td>
</tr>
<tr>
<td>11.6</td>
<td>Completed Schedule Check List</td>
<td>157</td>
</tr>
<tr>
<td>11.7</td>
<td>Workshop 9 – Constraints</td>
<td>158</td>
</tr>
<tr>
<td>12</td>
<td>GROUP, SORT AND LAYOUTS</td>
<td>162</td>
</tr>
<tr>
<td>12.1</td>
<td>Group and Sort Activities</td>
<td>163</td>
</tr>
<tr>
<td>12.1.1</td>
<td>Display Options</td>
<td>163</td>
</tr>
<tr>
<td>12.1.2</td>
<td>Group By</td>
<td>165</td>
</tr>
<tr>
<td>12.1.3</td>
<td>Group By Options</td>
<td>166</td>
</tr>
<tr>
<td>12.1.4</td>
<td>Sorting</td>
<td>167</td>
</tr>
<tr>
<td>12.1.5</td>
<td>Auto-Reorganization</td>
<td>168</td>
</tr>
<tr>
<td>12.1.6</td>
<td>Set Page Breaks in the Group and Sort Form</td>
<td>168</td>
</tr>
<tr>
<td>12.1.7</td>
<td>Group and Sort Projects at Enterprise Level</td>
<td>169</td>
</tr>
<tr>
<td>Section</td>
<td>Title</td>
<td>Page</td>
</tr>
<tr>
<td>---------</td>
<td>----------------------------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>12.2</td>
<td>Understanding Layouts</td>
<td>169</td>
</tr>
<tr>
<td>12.2.1</td>
<td>Applying an Existing Layout</td>
<td>170</td>
</tr>
<tr>
<td>12.2.2</td>
<td>Creating a New Layout</td>
<td>171</td>
</tr>
<tr>
<td>12.2.3</td>
<td>Saving a Layout after Changes</td>
<td>171</td>
</tr>
<tr>
<td>12.2.4</td>
<td>Layout Types</td>
<td>171</td>
</tr>
<tr>
<td>12.2.5</td>
<td>Changing Activity Layout Types in Panes</td>
<td>172</td>
</tr>
<tr>
<td>12.2.6</td>
<td>Activities Window Layout Panes</td>
<td>172</td>
</tr>
<tr>
<td>12.2.7</td>
<td>WBS and Projects Window Panes</td>
<td>174</td>
</tr>
<tr>
<td>12.3</td>
<td>Copying a Layout To and From Another Database</td>
<td>174</td>
</tr>
<tr>
<td>12.4</td>
<td>Workshop 10 – Organizing Your Data</td>
<td>175</td>
</tr>
<tr>
<td>12.3</td>
<td>Copying a Layout To and From Another Database</td>
<td>174</td>
</tr>
<tr>
<td>12.3</td>
<td>Workshop 10 – Organizing Your Data</td>
<td>175</td>
</tr>
<tr>
<td>13</td>
<td>FILTERS</td>
<td>177</td>
</tr>
<tr>
<td>13.1</td>
<td>Understanding Filters</td>
<td>177</td>
</tr>
<tr>
<td>13.2</td>
<td>Applying a Filter</td>
<td>178</td>
</tr>
<tr>
<td>13.2.1</td>
<td>Filters Form</td>
<td>178</td>
</tr>
<tr>
<td>13.2.2</td>
<td>Applying a Single Filter</td>
<td>178</td>
</tr>
<tr>
<td>13.2.3</td>
<td>Applying a Combination Filter</td>
<td>178</td>
</tr>
<tr>
<td>13.3</td>
<td>Creating and Modifying a Filter</td>
<td>179</td>
</tr>
<tr>
<td>13.3.1</td>
<td>Creating a New Filter</td>
<td>179</td>
</tr>
<tr>
<td>13.3.2</td>
<td>One Parameter Filter</td>
<td>179</td>
</tr>
<tr>
<td>13.3.3</td>
<td>Two Parameter Filter</td>
<td>180</td>
</tr>
<tr>
<td>13.3.4</td>
<td>Multiple Parameter Filter</td>
<td>181</td>
</tr>
<tr>
<td>13.3.5</td>
<td>Editing and Organizing Filter Parameters</td>
<td>181</td>
</tr>
<tr>
<td>13.3.6</td>
<td>Understanding Resource Filters</td>
<td>181</td>
</tr>
<tr>
<td>13.4</td>
<td>Activity Critical Path Visibility</td>
<td>182</td>
</tr>
<tr>
<td>13.5</td>
<td>Workshop 11 – Filters</td>
<td>188</td>
</tr>
<tr>
<td>14</td>
<td>PRINTING, REPORTS AND VISUALIZER</td>
<td>191</td>
</tr>
<tr>
<td>14.1</td>
<td>Printing</td>
<td>191</td>
</tr>
<tr>
<td>14.1.1</td>
<td>Print Preview</td>
<td>192</td>
</tr>
<tr>
<td>14.1.2</td>
<td>Page Setup</td>
<td>193</td>
</tr>
<tr>
<td>14.1.3</td>
<td>Print Form</td>
<td>197</td>
</tr>
<tr>
<td>14.1.4</td>
<td>Print Setup Form</td>
<td>197</td>
</tr>
<tr>
<td>14.2</td>
<td>Reports</td>
<td>197</td>
</tr>
<tr>
<td>14.2.1</td>
<td>Running Reports</td>
<td>198</td>
</tr>
<tr>
<td>14.2.2</td>
<td>Editing Reports</td>
<td>198</td>
</tr>
<tr>
<td>14.3</td>
<td>Publish to a Web Site</td>
<td>199</td>
</tr>
<tr>
<td>14.4</td>
<td>Visualizer</td>
<td>200</td>
</tr>
<tr>
<td>14.4.1</td>
<td>Understanding Visualizer</td>
<td>200</td>
</tr>
<tr>
<td>14.4.2</td>
<td>Starting Visualizer</td>
<td>201</td>
</tr>
<tr>
<td>14.4.3</td>
<td>Create a New TSLD – Timescaled Logic Diagram</td>
<td>202</td>
</tr>
<tr>
<td>14.4.4</td>
<td>Create a New Gantt Diagram</td>
<td>206</td>
</tr>
<tr>
<td>14.4.5</td>
<td>Manage Layouts</td>
<td>208</td>
</tr>
<tr>
<td>14.5</td>
<td>Claim Digger – Schedule Comparison</td>
<td>210</td>
</tr>
<tr>
<td>14.6</td>
<td>Workshop 12 – Printing</td>
<td>212</td>
</tr>
</tbody>
</table>
## SCHEDULE OPTIONS AND SETTING A BASELINE

15.1 Understanding Date Fields  
15.1.1 Early Start and Early Finish  
15.1.2 Late Start and Late Finish  
15.1.3 Actual Start and Finish  
15.1.4 Start and Finish  
15.1.5 Planned Dates  
15.1.6 Planned Dates Issues  
15.1.7 Remaining Early Start and Finish  
15.1.8 Remaining Late Start and Finish  

15.2 Schedule Options – General Tab  
15.2.1 Ignore relationships to and from other projects  
15.2.2 Make open-ended activities critical  
15.2.3 Use Expected Finish Dates  
15.2.4 Schedule automatically when a change affects dates  
15.2.5 Level resources during scheduling  
15.2.6 Recalculate assignment costs after scheduling  
15.2.7 When scheduling progressed activities use  
15.2.8 Calculate start-to-start lag from  
15.2.9 Define critical activities as  
15.2.10 Calculate float based on finish date  
15.2.11 Compute Total Float as  
15.2.12 Calendar for scheduling Relationship Lag  

15.3 Setting the Baseline  
15.3.1 Creating a Baseline  
15.3.2 Deleting a Baseline  
15.3.3 Restoring a Baseline to the Database as an Active Project  
15.3.4 Update Baselines  
15.3.5 Copying a Baseline with Baselines  
15.3.6 Setting the Baseline Project  
15.3.7 Understanding the <Current Project> Baseline  
15.3.8 Displaying the Baseline Data  

15.4 Limitations on Viewing Baseline Data  
15.5 Workshop 13 – WBS, LOEs and Setting the Baseline  

## UPDATING AN UNRESOURCED SCHEDULE

16.1 Practical Methods of Recording Progress  
16.2 Understanding the Concepts  
16.2.1 Activity Lifecycle  
16.2.2 Assigning an Actual Start Date and Time of an Activity  
16.2.3 Assigning an Actual Finish Date and Time of an Activity  
16.2.4 Calculation of Durations of an In-Progress Activity  
16.2.5 Summary Bars Progress Calculation  
16.2.6 Understanding the Current Data Date  

16.3 Updating the Schedule  
16.3.1 Updating Activities Using the Status Tab of the Details Form  
16.3.2 Updating Activities Using Columns
16.4 Progress Spotlight and Update Progress 251
16.4.1 Highlighting Activities for Updating by Dragging the Data Date 251
16.4.2 Spotlitng Activities Using Spotlight Icon 252
16.4.3 Updating a Project Using Update Progress 252
16.5 Suspend and Resume 254
16.6 Scheduling the Project 255
16.7 Comparing Progress with Baseline 255
16.8 Progress Line Display on the Gantt Chart 256
16.9 Check List before Updating a Schedule 257
16.10 In-Progress Schedule Check List 257
16.11 Corrective Action 258
16.12 Workshop 14 – Progressing and Baseline Comparison 259

17 USER AND ADMINISTRATION PREFERENCES 265

17.1 User Preferences 265
17.1.1 Time Units Tab 265
17.1.2 Dates Tab 266
17.1.3 Currency Tab 266
17.1.4 E-Mail Tab 267
17.1.5 Assistance Tab 267
17.1.6 Application Tab 267
17.1.7 Password Tab 269
17.1.8 Resource Analysis Tab 269
17.1.9 Calculations Tab 270
17.1.10 Startup Filters Tab 271
17.1.11 Personal Information Tab 271
17.2 Admin Menu- Create Users 272
17.2.1 Users 273
17.2.2 Security Profiles 274
17.3 Admin Preferences 274
17.3.1 General Tab 275
17.3.2 Timesheets Tab 275
17.3.3 Data Limits Tab 276
17.3.4 ID Lengths Tab 276
17.3.5 Time Periods Tab 276
17.3.6 Earned Value Tab 277
17.3.7 Reports Tab 277
17.3.8 Options Tab 278
17.3.9 Rate Types Tab 278
17.3.10 Industry Tab 279
17.3.11 Consent Notice 280
17.3.12 Status of User Acceptance 280
17.3.13 Exception Site List 281
17.4 Admin Categories 281
17.5 Miscellaneous Defaults 282
17.5.1 Currencies 282
17.5.2 Financial Periods and Financial Period Calendars 282
17.5.3 Default Project 283
17.5.4 Set Language 284

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### 18 CREATING ROLES AND RESOURCES

18.1 Understanding Resources and Roles

18.1.1 Individual Resources

18.1.2 Group Resources

18.1.3 Input and Output Resources

18.1.4 Understanding Roles

18.2 Creating Roles

18.2.1 P6 Version 19 and Earlier – Roles Rate may not be varied over time

18.2.2 P6 Version 20 and Later – Roles Rate may be varied over time

18.2.3 P6 Version 20 and Later – Roles may be assigned a Role Code

18.2.4 Resource and Role Cost Spreads Consider Rate Changes Over Time

18.3 Creating Resources and the Resources Window

18.3.1 Resource Breakdown Structure – RBS

18.3.2 Formatting the Resources Window

18.3.3 Adding Resources

18.3.4 General Tab

18.3.5 Codes Tab

18.3.6 Details Tab

18.3.7 Units and Prices Tab

18.3.8 Roles Tab

18.3.9 Notes Tab

18.3.10 Progress Reporter Tab

18.4 Workshop 15 – Adding Resources to the Database

### 19 ASSIGNING ROLES, RESOURCES AND EXPENSES

19.1 Understanding Resource Calculations and Terminology

19.2 Project Window Resource Preferences

19.2.1 Resources Tab

19.2.2 Understanding Resource Option to Drive Activity Dates

19.2.3 Calculations Tab

19.3 User Preferences Applicable to Assigning Resources

19.3.1 Units/Time Format

19.3.2 Resource Assignments

19.3.3 Assignment Staffing

19.4 Activities Window Resource Preferences and Defaults

19.4.1 Details Status Form

19.4.2 Activity Type

19.4.3 Duration Type

19.5 Assigning and Removing Roles

19.6 Assigning and Removing Resources

19.6.1 Assigning a Resource to an Assigned Role

19.6.2 Assigning a Resource to an Activity Without a Role

19.6.3 Removing a Resource

19.6.4 Assigning a Resource to an Activity More Than Once

19.7 Resource and Activity Duration Calculation and Resource Lags

19.7.1 Activity Duration

19.7.2 Resource Lag
19.8 Expenses
19.8.1 Expenses Window
19.8.2 Expenses Tab in the Activities Window
19.9 Suggested Setup for Creating a Resourced Schedule
19.10 Workshop 16 – Assigning Resources and Expenses to Activities

20 RESOURCE OPTIMIZATION
20.1 Reviewing Resource Loading
20.1.1 Activity Usage Spreadsheet
20.1.2 Activity Usage Profile
20.1.3 Resource Usage Spreadsheet
20.1.4 Editing the Resource Usage Spreadsheet – Bucket Planning and Range Copy
20.1.5 Range Copy and Paste from Excel and P6 into the Resource Usage Profile
20.1.6 Resource Usage Profile displaying a Resource Histogram
20.1.7 Activity Usage Profile Displaying S-Curves
20.2 Resource Assignments Window
20.3 Copying and Pasting into Excel
20.4 Other Tools for Histograms and Tables
20.5 Methods of Resolving Resource Peaks and Conflicts
20.6 Resource Leveling
20.6.1 Methods of Resource Leveling
20.6.2 Resource Leveling Function
20.6.3 Level Resources Form
20.7 Leveling Examples
20.7.1 Leveling with Positive Float
20.7.2 Leveling without Positive Float
20.8 Resource Shifts
20.8.1 Creating Shifts:
20.8.2 Assigning Shifts to Resources
20.8.3 Leveling with Shifts
20.9 Guidelines for Leveling
20.10 What to look for if Resources are Not Leveling
20.11 Resource Curves
20.12 Workshop 17 – Resources Optimization

21 UPDATING A RESOURCED SCHEDULE
21.1 Understanding Budget Values and Baseline Projects
21.1.1 Cost and Units Budget Values
21.1.2 Baseline Project and Values
21.2 Understanding the Current Data Date
21.3 Information Required to Update a Resourced Schedule
21.4 Project Window Defaults for Updating a Resourced Schedule
21.5 Activities Window – Percent Complete Types
21.5.1 Assigning the Project Default Percent Complete Type
21.5.2 Physical Percent Complete Type
21.5.3 Duration Percent Complete Type
21.5.4 Units Percent Complete Type
21.6 Using Steps to Calculate Activity Percent Complete
21.7 Updaci ng the Schedule 363
21.7.1 Preferences, Defaults and Options for Updating a Project 363
21.7.2 Updating Dates and Percentage Complete 365
21.8 Updating Resources 365
21.8.1 Resources Tab 366
21.8.2 Status Tab 366
21.8.3 Applying Actuals 366
21.9 Updating Expenses 368
21.10 Workshop 18 – Updating a Resourced Schedule 369

22 OTHER METHODS OF ORGANIZING PROJECT DATA 373
22.1 Understanding Project Breakdown Structures 373
22.2 Activity Codes 373
22.2.1 Understanding Activity Codes 374
22.2.2 Activity Code Creation 375
22.2.3 Defining Activity Code Values and Descriptions 376
22.2.4 Assigning Activity Code Values to Activities 376
22.2.5 Add Activity Codes When Assigning Codes 377
22.2.6 Grouping, Sorting and Filtering with Activity Codes 377
22.2.7 User Preferences, Application, Codes Option 378
22.2.8 Importing Activity Codes with Excel 378
22.3 User Defined Fields 379
22.4 WBS Category or Project Phase 382
22.5 Resource Codes 382
22.6 Cost Accounts 383
22.7 Owner Activity Attribute 383
22.8 Assignment Codes 384
22.9 Role Codes 385
22.10 Workshop 19 – Activity Codes and User Defined Fields 386

23 GLOBAL CHANGE 388
23.1 Introducing Global Change 388
23.2 The Basic Concepts of Global Change 389
23.3 Specifying the Change Statements 391
23.4 Examples of Simple Global Changes 392
23.5 Selecting the Activities for the Global Change 393
23.6 Duration Calculations with Global Change 393
23.7 (Any of the following) and (All of the following) 394
23.8 Temporary Values 395
23.9 Global Change Functions 395
23.10 More Advanced Examples of Global Change 396
23.11 Workshop 20 – Global Change 397

24 MANAGING THE ENTERPRISE ENVIRONMENT 400
24.1 Multiple User Data Display Issues 401
24.2 Enterprise Project Structure (EPS) 402
24.3 Project Portfolios 402
<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>24.4</td>
<td>Organizational Breakdown Structure – OBS</td>
<td>403</td>
</tr>
<tr>
<td>24.4.1</td>
<td>Creating an OBS Structure</td>
<td>403</td>
</tr>
<tr>
<td>24.4.2</td>
<td>General Tab</td>
<td>403</td>
</tr>
<tr>
<td>24.4.3</td>
<td>Users Tab</td>
<td>403</td>
</tr>
<tr>
<td>24.4.4</td>
<td>Responsibility Tab</td>
<td>403</td>
</tr>
<tr>
<td>24.5</td>
<td>Create Users, Security Profiles and Organizational Breakdown Structure</td>
<td>404</td>
</tr>
<tr>
<td>24.6</td>
<td>Project Codes</td>
<td>406</td>
</tr>
<tr>
<td>24.7</td>
<td>Filtering, Grouping and Sorting Projects in the Projects Window</td>
<td>406</td>
</tr>
<tr>
<td>24.8</td>
<td>Project Durations in the Projects Window</td>
<td>407</td>
</tr>
<tr>
<td>24.10</td>
<td>Summarizing Projects</td>
<td>407</td>
</tr>
<tr>
<td>24.11</td>
<td>Job Services</td>
<td>408</td>
</tr>
<tr>
<td>24.12</td>
<td>Tracking Window</td>
<td>409</td>
</tr>
<tr>
<td>25</td>
<td>MULTIPLE PROJECT SCHEDULING</td>
<td>411</td>
</tr>
<tr>
<td>25.1</td>
<td>Multiple Projects in One Primavera Project</td>
<td>411</td>
</tr>
<tr>
<td>25.2</td>
<td>Multiple P6 Primavera Projects Representing One Project</td>
<td>411</td>
</tr>
<tr>
<td>25.3</td>
<td>Setting Up Primavera Projects as Sub-projects</td>
<td>412</td>
</tr>
<tr>
<td>25.3.1</td>
<td>Opening One or More Projects</td>
<td>412</td>
</tr>
<tr>
<td>25.3.2</td>
<td>Default Project</td>
<td>413</td>
</tr>
<tr>
<td>25.3.3</td>
<td>Setting the Projects Data Dates P6 Version 19 and Earlier</td>
<td>414</td>
</tr>
<tr>
<td>25.3.4</td>
<td>P6 Version 20 Data Date Selection in Multiple Project Scheduling</td>
<td>415</td>
</tr>
<tr>
<td>25.3.5</td>
<td>P6 Version 20 Multiple Project Scheduling Options Selection</td>
<td>415</td>
</tr>
<tr>
<td>25.3.6</td>
<td>Total Float Calculation</td>
<td>416</td>
</tr>
<tr>
<td>25.4</td>
<td>Refresh Data F5 and Commit Changes F10</td>
<td>416</td>
</tr>
<tr>
<td>25.5</td>
<td>Who Has the Project Open?</td>
<td>417</td>
</tr>
<tr>
<td>25.6</td>
<td>Setting Baselines for Multiple Projects</td>
<td>418</td>
</tr>
<tr>
<td>25.7</td>
<td>Restoring Baselines for Multiple Projects</td>
<td>419</td>
</tr>
<tr>
<td>26</td>
<td>UTILITIES</td>
<td>421</td>
</tr>
<tr>
<td>26.1</td>
<td>Reflection Projects</td>
<td>421</td>
</tr>
<tr>
<td>26.2</td>
<td>Advanced Schedule Options</td>
<td>422</td>
</tr>
<tr>
<td>26.2.1</td>
<td>Calculating Multiple Paths</td>
<td>422</td>
</tr>
<tr>
<td>26.2.2</td>
<td>Displaying Multiple Paths</td>
<td>423</td>
</tr>
<tr>
<td>26.3</td>
<td>Audit Trail Columns</td>
<td>423</td>
</tr>
<tr>
<td>26.4</td>
<td>Excel Import and Export Tool</td>
<td>424</td>
</tr>
<tr>
<td>26.4.1</td>
<td>Notes and/or Restrictions on Export</td>
<td>425</td>
</tr>
<tr>
<td>26.4.2</td>
<td>Notes and Restrictions on Import</td>
<td>425</td>
</tr>
<tr>
<td>26.5</td>
<td>Project Import and Export</td>
<td>427</td>
</tr>
<tr>
<td>26.6</td>
<td>Check In and Check Out</td>
<td>431</td>
</tr>
<tr>
<td>26.7</td>
<td>Online HTML Help</td>
<td>432</td>
</tr>
<tr>
<td>26.8</td>
<td>Activity Discussion Feature</td>
<td>432</td>
</tr>
<tr>
<td>26.9</td>
<td>Lean Tasks may be imported using an XML file</td>
<td>433</td>
</tr>
<tr>
<td>26.10</td>
<td>Maintain Relationships with External Projects</td>
<td>433</td>
</tr>
<tr>
<td>26.11</td>
<td>Assignment Cost are Exported</td>
<td>435</td>
</tr>
<tr>
<td>26.12</td>
<td>Multiple Project Views Displayed Side by Side</td>
<td>436</td>
</tr>
</tbody>
</table>
27 EARNED VALUE MANAGEMENT WITH P6 437
27.1 Performance Measurement Baseline 438
27.2 Planned Value 439
27.3 Earned Value
27.3.1 Performance % Complete 440
27.3.2 Activity percent complete 440
27.3.3 WBS Milestones percent complete 441
27.3.4 0/100 441
27.3.5 50/50 441
27.3.6 Custom percent complete 441
27.3.7 Example of the Calculation of the Earned Value 441
27.4 Actual Costs 442
27.4.1 Total to Date 442
27.4.2 Financial Periods 442
27.4.3 Version 8 to 19 Financial Periods 442
27.4.4 Version 20 Financial Period Calendars Enhancement 444
27.5 Estimate to Complete 445
27.5.1 Estimate to Complete from Resource Data 446
27.5.2 Estimate to Complete from P6 EV Calculations 446
27.6 Activity Usage S-Curves 447
27.6.1 Activity Usage Profile Bars and Curves 447
27.6.2 Show Earned Value Curves 448
27.7 Sample Graphical S-Curves 449

28 WHAT IS NEW IN P6 VERSIONS 18, 19, 20, 21, 22 AND 23 450
28.1 Databases and Tool 450
28.2 Consent Notice and Status of User Acceptance 450
28.3 Stored Images 450
28.4 XML Check In and Check Out 450
28.5 Dissolving Activities with Lag using Retain Lag 451
28.6 Project Code Maximum Length Increase 451
28.7 Details, User Defined Fields tab 451
28.8 Data Date Default for Apply Actuals 451
28.9 Allow or Restrict Access to Resources from Multiple Parent Resources 451
28.10 Relationship Comments 451
28.11 Roles Rate may now be varied over time 452
28.12 Data Date Selection in Multiple Project Scheduling 452
28.13 Multiple Project Scheduling Options Selection 452
28.14 Lean Tasks may be imported using an XML file 453
28.15 Different Projects may have different Financial Periods 454
28.16 Assignment Codes 454
28.17 Histogram Bars Exact Values 454
28.18 Other Enhancements in P6 Version 20 455
28.18.1 Resource Assignment Window now allows Grouping and Filtering
by Codes and UDFs 455
28.18.2 Fill down available in Activities Window Resource Usage Spreadsheet 455
28.18.3 P6 Continues Working when there is a Network Failure 455
28.18.4 Prevent Risk Categories being Imported into a PPM Database 455
28.18.5 Reset Locked Users 455
28.18.6 Uploading of Harmful Files 455
### 8 FORMATTING THE DISPLAY

This chapter shows you how to set up the on-screen presentation so that the schedule will be easier to read and more consistent. This chapter covers the following display and customizing topics:

<table>
<thead>
<tr>
<th>Topic</th>
<th>Menu Command</th>
</tr>
</thead>
</table>
| Formatting Columns           | Open the Column form:  
  - Select View, Columns, Customize…, or  
  - Click on the icon.                                                                 |
| Formatting Activity Bars     | Open the Bar form:  
  - Select View, Bars, Options…, or  
  - Click on the icon.                                                                 |
| Format Gridlines             | Bar Chart Gridlines are formatted in the View, Bar, Options… form, Sightlines tab.                                                         |
| Format Data Date             | The Data Date is formatted in the Bar Chart Options form, Data Date tab.                                                                    |
| Formatting Row Height        | Open the Table, Font and Row form by:  
  - Selecting View, Table Font and Row.                                                                                                     |
| Formatting Colors            | There are limited options for formatting colors:  
  - Text colors are formatted in the Color form accessed from the Table, Font and Row form which is opened by selecting View, Table Font and Row, icon.  
  - Bar Colors are covered in the Formatting the Bars paragraph of this chapter.  
  - Band colors are selected as part of the formatting of the layout by selecting View, Group and Sort by or clicking on the Band colors icon. |
| Formatting Fonts             | There are limited options for formatting fonts:  
  - Text fonts are formatted in the Font form accessed from the Table, Font and Row form which is opened by selecting View, Table Font and Row, icon.  
  - Notebook entries may be formatted when edited.                                                                                          |
| Format Timescale             | Click on the icon, or  
  - Select View, Timescale, or  
  - Right-click in the Bar Chart area and select Timescale.                                                                                   |

The formatting is applied to the current Layout and this formatting may be automatically saved as part of the Layout when another Layout is selected; the system will prompt. Views are covered in the Group, Sort and Layouts chapter.

⚠️ Beware of clicking the button in any form; this does not save your edits, but resets the form back to the Primavera defaults, destroying your hard work.
8.1 Formatting the Project Window

The formatting of the Project Window is very similar to the formatting of the Activities Window and will not be covered separately. Formatting, Filters and Layouts all work in the same way, except one is dealing with projects and not activities.

8.2 Understanding Forms

Unlike many software packages, Primavera has sorting and filtering functions in most forms and the principles are the same in most forms. This section will demonstrate some of the functions but you must be prepared to experiment with each form to see how they operate.

- Clicking in the Resource ID column of the Resources Window takes the formatting from hierarchical to alphabetical to reverse alphabetical and back to hierarchical. This function works in other forms with a hierarchical structure.

- The Assign Successors form has Filter By and Group and Sort By options that affect how data is grouped.

- The Assign Resource form has Columns, Filter By, and Group and Sort By options that affect what data is available.

- Ctrl+F will also allow you to search for Resources matching a specific criterion.
8.3 Formatting the Bars

- The bars in the Gantt Chart may be formatted to suit your requirements for display. Primavera does not have the option to format individual bars as in Microsoft Project and Elecosoft Powerproject. The coloring of specific activities may be achieved by creating a bar style (with the desired colors) with a filter to assign the bar style to select the activities requiring specific formatting, or using Visualizer.

At the time of writing this book the author had placed a layout on https://primavera.com.au/ under the Technical Papers page that has the bar formatting issues discussed below fixed. It is suggested that downloading this layout will save users a significant amount of formatting time.

8.3.1 Formatting Activity Bars

To format all the bars you must open the Bar form:

- Select View, Bars, or
- Click on the icon, or
- Right-click in the bars area and select Bars from the menu.

The following notes are the main points for using this function. Detailed information is available in the Help facility by searching for “Bar styles dialog box.”

- Each bar listed in the table may be displayed on the bar chart by checking the box in the Display column.
- New bars may be added by clicking on the Add icon and deleted by clicking on the Delete icon.
- The bar at the top of the list is placed on the screen and the one below drawn over the top of it, so it would be simple to hide one bar with a second. The Shift up and Shift down icons are used to move the bars up or down the list and therefore determine which bar is drawn on top of the next.
- The Name is the title assigned to the bar and may be displayed in the printout legend.
8.3.2 Formatting Bars Issues

There are a number of issues with the Primavera standard bar formatting that need to be understood so the user may display the activity bars logically.

**Actual, Remaining Critical and Remaining Critical Bars**

It is recommended that you use the Primavera default bar display options displaying the Actual Work (this bar is displayed from the Start date to the Data Date), Remaining Work and Critical Remaining Work bars (these bars are displayed from the Data Date to the Finish date with the appropriate filter). This is because the Early bar will not display actual progress as in other software packages. Please read the Understanding Dates section in the Tracking Progress chapter to understand how the dates are calculated that are used to draw each bar.

**Total Float Bar**

The Total Float Bar is called the Float Bar in the Bars form which is inconsistent terminology.

By default, a Total Float bar is displayed on a completed activity but the Float value is set to “Null” (which is displayed as a blank). It is not logical to display a float bar when there is no float value:
To prevent this from happening you should edit the total Float Bar Filter in the Bars form so it is only displayed for Not Started or In Progress activities:

<table>
<thead>
<tr>
<th>Display</th>
<th>Name</th>
<th>Timescale</th>
<th>User Start Date</th>
<th>User Finish Date</th>
<th>Filter</th>
<th>Preview</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Float Bar</td>
<td>Float Bar</td>
<td></td>
<td></td>
<td></td>
<td>Not Started or In Progress</td>
<td></td>
</tr>
</tbody>
</table>

This is what it should look like now:

Free Float Bar
This may not be easily displayed.

A Baseline Bar is Displayed when NO Project Baseline set
A Project Baseline Bar and Primary User Baseline Bar is displayed when a Baseline has not been assigned in the Assign Baseline form. The Planned Dates are displayed as the Baseline Bar. Therefore, you must ensure you have a Baseline set before displaying a Baseline Bar. The Secondary and Tertiary Baselines bars are not displayed until a baseline has been assigned.

Relationships displayed on Baseline Bars
By default, the relationships are displayed on the Baseline Bar, this is not the normal method:

To remove relationships from the Baseline Bar and put them on the current bars, move all the Baseline Bars and Baseline Milestones to the bottom of the Bars form:
Remaining Level of Effort and Actual Level of Effort Bars

These are by default hidden and when these Activity Types are used then the activity bar will disappear. You should check both these bars so they are always displayed.

Baseline Bar Formatting

After you have moved all the baseline bars to the bottom:

- There is no **Project Baseline Milestone**; this will need to be added,
- The **Project Baseline** and **Primary Baseline** bars are both narrow yellow bars, the same as the **Negative Float**, 
  - It is suggested you make them a different color and put them as thicker bars on the top and bottom of row 2,
  - Then change the **Baseline Milestone** colors to match,
  - Change the shape so one may be seen behind the other, and
  - Change the descriptions so they make sense,
- There are no **Secondary Baseline** or **Tertiary Baseline Milestones**. If you are not using these then delete the **Secondary Baseline** or **Tertiary Baseline** bars:

<table>
<thead>
<tr>
<th>Display</th>
<th>Name</th>
<th>Timescale</th>
<th>User S</th>
<th>User F</th>
<th>Filter</th>
<th>Preview</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Project Baseline Bar</td>
<td>Project Baseline Bar</td>
<td>Normal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Project Baseline Milestone</td>
<td>Project Baseline Milestone</td>
<td>Milestone</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Primary Baseline</td>
<td>Primary Baseline Bar</td>
<td>Normal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Primary Baseline Milestone</td>
<td>Primary Baseline Milestone</td>
<td>Milestone</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Text on Bars**

There is text on many bars and it is difficult to add or remove text from bars with the current configuration. It is suggested that text be removed from all bars, except from the **Current Bar Labels** bar by:

- Clicking on the **Bar Labels** tab at the bottom,
- Clicking on one bar at a time and using the [Delete] button at the bottom (NOT SIDE) of the screen to delete the text line,
- Changing the **Current Bar Labels** bar filter to read All Activities.

Now if you display the **Current Bar Labels** bar then text will be displayed on all bars and when this bar is hidden then all text will be removed from bars, thus making it simpler to add or remove bar text:
Suspend Date Display

To ensure a **Suspend** date is displayed on the bar the Activity nonwork intervals should be checked:

Creating a Summary Baseline Bar

The default formatting also has no bar to display a Baseline Summary bar. To create a Summary Baseline bar, you must add and format a bar as per the picture below:
Creating a Summary Bar

It is not obvious how to create a Summary Bar:

- To create a new Summary Bar you will see that you may not select Summary from the filter drop-down box,
- You must check the Bar Settings tab, Show bar for grouping bands to create a Summary Bar:

At the time of writing this book the author had placed a layout on https://primavera.com.au/ under Technical Papers that has these bar formatting issues fixed. It is suggested that downloading this layout will save users a significant amount of formatting time.

The formatting of any existing layout may be set to the same as another layout, such as the www.primavera.com.au_layout, by using the Copy From… function.

Baseline Bar Disappearing when an Activity is made an LOE

Often after a Baseline has been set, it is required to add more detail to a baselined activity but retain a view of the original Baseline bar. This may be achieved by converting the original Activity to an LOE and adding the detailed activities below the LOE and linking the new activities to it. If the original Baseline activity disappears the you need to open the bars form and set the filter to All Activities and the Baseline bar will be displayed:
www.primavera.com.au_Layout
This layout may be downloaded from https://primavera.com.au/ under Software and Downloads page, unzip it and place it on your desktop. Layouts created from later software versions may be identified from the file name.

A layout has been exported from each later version in order for new fields that have been added to database to be displayed, the version number is in the layout name.

This layout has the bars formatted as per the pictures below and resolves all the issues with the Primavera P6 defaults discussed above:

<table>
<thead>
<tr>
<th>Display</th>
<th>Name</th>
<th>Timescale</th>
<th>Filter</th>
<th>Preview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remaining Level of Eff</td>
<td>Remain Bar</td>
<td>Level of Eff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual Level of Eff</td>
<td>Actual Bar</td>
<td>Level of Eff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual Work</td>
<td>Actual Bar</td>
<td>Normal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remaining Work</td>
<td>Remain Bar</td>
<td>Normal and Non-critical</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Critical Remaining Work</td>
<td>Remain Bar</td>
<td>Has Start Constraint</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Constraint</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finish Constraint</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activity Name on Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dates on Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Milestone</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Complete</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Float Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Neg Float Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Baseline Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Baseline MS</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Baseline Summary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Baseline Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Baseline MS</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Baseline Summary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secondary Baseline Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secondary Baseline MS</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secondary Baseline Summary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tertiary Baseline Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tertiary Baseline MS</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tertiary Baseline Summary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Late Bar</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Later version also have a resource bar added but not displayed.

Later versions of P6 format the Name column to the left and the picture above is from an earlier version of P6 and shows the Name column formatted to the right. Administrators must check all their P6 Layouts to ensure the bars formatting is good and ensure all users are aware of the issues of using the Bars form Default button. One option is to just replace all the Oracle bar formatting with the formatting from the www.primavera.com.au_Layout.
8.3.3 Bar Style Tab
The appearance of each bar is edited in the lower half of the form. The bar’s start, middle, and end points may have their color, shape, pattern, etc., formatted.

The bars may be placed on one of three rows numbered from 1 to 3, from top to bottom, one bar above the other. If multiple bars are placed on the same row, the bar at the top of the list will be drawn first and the ones lower down the list will be drawn over the top.

8.3.4 Bar Settings Tab

Show bar when collapsed
- **Show bar when collapsed** option displays the detailed bars on a single line when the WBS Node has been summarized; see the two pictures following:
  - Before summarizing:
    - Instalation
      - CS760 Field Painting
      - CS750 Field Wiring
      - CS740 Field Piping
      - CS730 Install Conveyor 214
      - CS720 Install Conveyor 213
      - CS710 Install Conveyor 212
      - CS700 Install Conveyor 211
      - CS315 Site Preparation
      - CS311 Start Conveyor Installation

  - After summarizing:

This is similar to the Microsoft Project **Always roll up Gantt bars** option in the Layout form.
Show bar for grouping bands

This shows a summarized bar all the time and converts the filter automatically to “Summary” bars only.

When formatting the Bar Settings for Milestones it is important to take note of the checked boxes and Filter format. If the box Show bar for grouping bands is checked, Milestones will appear at the ends of Summary Bars and not in line with the actual activities they belong to. The filter in this case will read Summary and not Milestone.

Bar Necking Settings

Bar Necking displays a thinner bar during times of inactivity such as weekends and holidays and applies only to the Current Bar setting column in the Bars form:

- Calendar nonwork time necks the bar based on the activity’s calendar.
- Activity nonwork intervals necks the bar when Out of Sequence Progress options of Actual Dates or Retained Logic causes a break in the work. See the Advanced Schedule Options paragraph.

There is no Resource Bar available and Primavera will not neck on the resource calendar. When an activity is Resource Dependent and the resource is on a calendar different from the activity, then the bar may neck when the resource is working or not neck when the resource is not working.

8.3.5 Bar Labels Tab

This tab enables the placement of text with a bar above, below, to the left, and to the right. The following pictures show how the start and finish dates are formatted and displayed on the bar chart:

- Select the bar that you wish to add the label to.
- Click on the Add and the Delete icons at the bottom of the Bars form to add and delete a Label item.
- Select the Position and Label from the drop-down boxes in the Bar Labels tab.
- The dates on the bar chart are adopted from the **User Preferences** and may not be formatted separately.

  It is often useful to create a bar that only displays the text. This bar may be displayed or not displayed as required, which is much simpler than reformatting a bar to show text.

- Each **Notebook Topic** may be displayed on a bar one at a time by selecting the topic in the **Bar Labels** tab. After the box containing the label is displayed on the screen it may be adjusted in size by dragging.

8.3.6 **Bar Chart Options Form**

- The **Bar Chart Options** form is displayed by:
  - Clicking on the ***Options*** icon from the **Bars** form, or
  - By selecting **View, Bar, **Options**, or
  - Right-clicking in the Gantt Chart area and selecting **Bar Chart Options…**:
The **General** tab has a variety of options for formatting the bar chart which are mainly self-explanatory.

- **Show Relationships** has the same result as clicking on the icon and displays the relationships.
- **Show Legend** displays a legend on the bar chart in the Activities View; see the following picture:

![Diagram showing bar chart options](image)

The default size of the box displaying a **Notebook** topic may be set in the **Bar Chart Options** form, **General** tab, which is displayed by clicking on the icon from the **Bars** form.

The **Collapsed Bar** tab formats the bars when a WBS band has been collapsed and displays a summarized bar.

- **Collapse to grouping bars**:

![Diagram showing collapsed bars](image)

- **Collapse individual bars to minimize space**:

![Diagram showing individual bar collapse](image)

- **Collapse individual bars to minimize space and Allow overlapping of bar labels**:

![Diagram showing collapsed bars with overlapping labels](image)
• The **Data Date** tab formats the Data Date, its style, color and size:

![Data Date Tab](image)

• Primavera Version 5.0 introduced the **Sight Lines** tab which enables the specification of both Major and Minor vertical and horizontal Sight Lines, which brings this functionality up to match Microsoft Project, but nowhere near the graphical functionality of Elecosoft (Asta) Powerproject.

![Sight Lines Tab](image)

• **Progress Line** Display on the Gantt Chart which is covered in detail in the next paragraph.
8.4 Progress Line Display on the Gantt Chart

A progress line displays how far ahead or behind activities are in relation to the Baseline. Either the Project Baseline or the Primary User Baseline may be used and there are four options:

- Difference between the Baseline Start Date and Activity Start Date,
- Difference between the Baseline Finish Date and Activity Finish Date,
- Connecting the progress points based on the Activity % Complete,
- Connecting the progress points based on the Activity Remaining Duration.

There are several main components of displaying a Progress Line in P6:

- First the progress line is formatted using the View, Bar, Options, form, Progress Line tab, which may also be opened by right-clicking in the Gantt Chart area:
  - Selecting View, Progress Line to hide or display the Progress Line.
  - If you use either of the options of Percent Complete or Remaining Duration then you must display the appropriate Baseline Bar that has been selected as the Baseline to use for calculating Progress Line:
  - The picture below shows the option highlighted above of Percent Complete:
8.5 Formatting Columns

8.5.1 Selecting the Columns to be Displayed
The columns are formatted through the Columns form which may be opened by:

- Select View, Columns, Customize, or
- Click on the icon, Customize, or
- Right-click in the Columns to open a menu and select Columns:

The columns may be sorted by List of Category and they may be added or deleted either by:

- Using the black arrows or
- By dragging the description left of right and up or down.
- When a Baseline is set then many more Baseline schedule column fields become available.
The Column form may be resized by dragging the edges.

- The available columns are displayed in the left window and may be listed under Categories or as a single List.
- To select how the column titles are displayed, click the Available Options drop-down box and then select Group and Sort By to choose either List or Categories, as per the picture above.
- The columns to be displayed are listed in the right Selected Options Window and are copied from Available Options to and from Selected Options using:
  - The icons \( \leftarrow \rightarrow \leftarrow \rightarrow \), or
  - Dragging, or
  - Double-clicking.
- The icon sets the columns back to the Primavera default column display.

8.5.2 Column Header Alignment
- Select View, Columns, Customize, or
- Click on the icon, Customize, then
- Select the option which opens the Edit Column form and enables a user definable column title to be created in the New Title: cell and the Column Title Alignment to be set to Left, Center, or Right.
8.5.3 Adjusting the Width of Columns
You may adjust the width of the column in two ways:

- By dragging the column title separator: move the mouse pointer to the nearest vertical line of the column. A mouse pointer will then appear and enable the column to be adjusted by click, hold and dragging.

- From the Column form select to open the Edit Column form and enter the width of the column in pixels.

8.5.4 Setting the Order of the Columns from Left to Right on the Screen
The order of the columns on the screen, from left to right, is the same as the order in the Columns form Selected Options Window from top to bottom. The order of the columns may be altered:

- Highlight the column in the Columns form Selected Options Window and use the and icons, or
- Click and hold the column title in a window and drag the column.

8.6 Row Height and Show Icon
Row heights may be adjusted to display text that would otherwise be truncated by a narrow column.

- The height of all rows may be formatted by selecting View, Table Font and Row to open the Table, Font and Row form. The options in this form are self-explanatory.
- The Show Icons option will display a different icon in front of the Activity and WBS.
  - In the Projects Window indicates a What-if project, a Unopened project, and an Opened project.
  - In the Activities Window indicates a WBS Node, a blue a complete activity, a blue and green an in-progress activity, and a green an un-started activity.

- The height of a single row may be manually adjusted in a similar way to adjusting row heights in Excel. Click the row; the pointer will change to a double-headed arrow ; then drag the row with the mouse. These manually adjusted rows are not saved with a Layout.
8.7 Format Timescale

8.7.1 Moving and Rescaling the Timescale
To display hidden parts of the schedule the timescale may be grabbed and moved by placing the cursor in the top half of the Timescale. The cursor will turn into a left-click and drag left or right.

The timescale may be rescaled, therefore increasing or decreasing the length of the bars and displaying more or less of the schedule, by placing the cursor in the bottom half of the Timescale. The cursor will turn into a ; click, hold and drag left to make the bars shorter and right to make the bars longer.

When there are no bars in view when you are viewing a time ahead or behind the activity dates, you may double-click in the Gantt Chart area to bring them back into view.

8.7.2 Format Timescale Command
The Timescale form provides a number of options for the display of the timescale, which is located above the Bar Chart. To open the Timescale form:

- Click on the icon, or
- Select View, Timescale, or
- Right-click in the Bar Chart area and select Timescale.

The options available in the Timescale form are:

- **Timescale Format** has the options of:
  - Two lines, or
  - Three lines

- **Font and Color**
  - The icon opens the Edit, Font and Color form which enables the timescale and column headers font and color to be changed.
  - By clicking on the icon all changes will be reversed.
Date Format

- **Type**
  - **Calendar** displays a normal calendar.
  - **Fiscal Year** displays the fiscal year in the year line. The Fiscal Year Start Month is set in the **Settings** tab of the **Project Details** form in the **Projects Window**.
  - **Week of the Year** displays the week of the year starting from "1" for the first week in January and is often termed **Manufacturing Week**.

- **Date Interval** sets the timescale and has the options in the picture to the right:
  - The **Week/Day 1** displays the days like this:

<table>
<thead>
<tr>
<th>Mar 03</th>
<th>Mar 10</th>
<th>Mar 17</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>T</td>
<td>W</td>
</tr>
</tbody>
</table>

  - The **Week/Day 2** displays the days like this:

<table>
<thead>
<tr>
<th>Mar 10</th>
<th>Mar 17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mon</td>
<td>Tue</td>
</tr>
</tbody>
</table>

  - The **Date Interval** may also be adjusted by clicking on the or , which moves the timescale setting up and down the list shown above.

- **Shift Calendar** breaks the day into time intervals to suit the shift intervals when the **Day/Shift** option has been selected.

- **Show Ordinal Dates** displays the timescale to be counted by the unit selected in the **Date Interval**. This is useful for displaying a schedule when the start of the project is unknown. Ordinal dates display the timescale by counting in the selected units starting from a user definable start date. When 3 lines are displayed the ordinal dates and calendar dates may be displayed:
8.7.3 Nonwork Period Shading in Timescale

The nonwork period shading behind the bars is set by the database Default Calendar and is selected by:

- In the Professional Version selecting Enterprise, Calendars...and checking a calendar in the Default Column, and
- In the Windows Client this is set through the Web under Administer, Enterprise Data.

8.8 Inserting Attachments – Text Boxes and Curtain

8.8.1 Adding and Deleting a Text Box

A text box may be inserted in a bar chart area:

- Select the Activity which the new Text Box is to be associated with, either
  - Right-click in the Bar Chart to open the menu, select Attachments, Text,
  - Or:
    - Select View, Attachments, Text, and
    - The Text Attachment form will be displayed.

Then:

- Type in the text and format the font by clicking on the icon.
- A Text Box may be repositioned by clicking on the text and using the cursor to drag the corners and sides.

To delete a Text box, position the cursor over the text box until it transforms into a + then click and you may now hit the Delete key.
8.8.2 Adding and Deleting a Curtain

Primavera Version 5.0 introduced a function allowing the placing of multiple curtains on the Gantt Chart which may be all hidden or displayed. A Curtain, used to highlight periods of time over part of the bar chart.

Select View, Attachments to display the Curtain menu or right-click a bar and select Attachments, Curtain:

- Add Curtain opens the Curtain Attachment form used to create a curtain,
- Show All shows all the curtains,
- Hide All hides all the curtains, and
- Double Clicking on a curtain in the Gantt Chart also opens the Curtain Attachment form where individual curtains may be deleted or hidden.

- Using the Start Date and Finish Date boxes, or
- Grabbing the left or right edge of the Curtain in the Bar Chart (the cursor will change to a ) and dragging the start or finish date, or
- Grabbing the Curtain in the center (the cursor will change to a ) and dragging the whole Curtain.

A curtain is deleted by double clicking on the curtain to open the Curtain Attachment form and clicking on the Delete button.
8.9 Format Fonts and Font Colors

The format font options are:

- The Activity Data fonts are formatted in the Table, Font and Row form (displayed in the paragraph above) by selecting View, Table Font and Row.
  - Clicking on the Font icon will open the font form where normal Windows functions are available.
  - Clicking on the Color icon will enable the selection of a color for the text.

- The Notebook Topics may be formatted using the formatting features above where the Notebook items are entered in the lower pane.

- Some forms may have the fonts for displaying data edited when there is a menu on the top left side with the Table Font and Row menu item.

- The text in a Text Box that has been inserted onto the Bar Chart may be formatted when the box is created.

8.10 Format Colors

These are the main options for formatting colors:

- Band colors in layouts are formatted in the Group and Sort form by clicking on the icon or selecting View, Group and Sort by.

- Text colors are covered in the Format Font and Colors paragraph.

- Bar Colors are covered in the Formatting the Bars paragraph.

- Timescale and Column Headers are covered in the Format Timescale Command paragraph.

- Sight Lines (Gridline) colors may not be formatted.

- The Progress Line color is selected in the Bar Chart Options form, Progress Line tab.

- The Data Date is formatted in the Bar Options form, Data Date tab.

- The Relationship Lines, also known as Dependencies, Logic, or Links, may not be formatted and are displayed with the following characteristics:
  - Solid Red for Critical,
  - Solid Black for Driving,
  - Dotted Black for Non-driving, and
  - Blue when selected and may be deleted.
8.11 Line Numbers

Select View, Line Number to display or hide the Line Number.

This is a very useful feature for reviewing a schedule to ensure that everyone in a meeting is looking at the same activity.

But as in Microsoft Project and Elecosoft (Asta) Powerproject this is an activity order and the number will change if the schedule is reordered.
8.12 Workshop 6 – Formatting the Bar Chart

Background

Management has received your draft report and requests that some changes be made to the presentation.

Assignment

Format your schedule as follows, but depending on the default settings, your Gantt Chart View may differ from that shown, e.g., there may be no summary bars:

1. You will not have to complete the Step 2 of this workshop if you have internet access and are able to download a www.primavera.com.au_Layout.plf layout from https://primavera.com.au/. There are layouts for later P6 Versions which are identified by the software version in the file name.
   - If you have downloaded and applied a www.primavera.com.au_Layout.plf move to Step 3, DO NOT COMPLETE Step 2.
   - If you have NOT downloaded and applied a www.primavera.com.au_Layout.plf complete Step 2.

2. Format Bars, only if you are unable to download a www.primavera.com.au_Layout.plf layout then:
   - To format the bars, open the Bars form,
   - Click on the button to set the bars to the Primavera default settings,
   - Edit the Float Bar Filter (Total Float bar) so it only shows float for Not Started or In Progress activities. Ensure you select the Any selected filter in the Filters form:

<table>
<thead>
<tr>
<th>Display</th>
<th>Name</th>
<th>Timescale</th>
<th>User Start Date</th>
<th>User Finish Date</th>
<th>Filter</th>
<th>Preview</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>Float Bar</td>
<td>Float Bar</td>
<td></td>
<td></td>
<td>Not Started or In Progress</td>
<td></td>
</tr>
</tbody>
</table>

- Delete the Secondary Baseline & Tertiary Baseline bars,
Move the Baseline bars and Baseline Milestones to the bottom of the Bars form to remove relationships on the Baseline bars,

Add missing Project Baseline Milestone and format the Baseline bars as per the picture below, making them different colors:

<table>
<thead>
<tr>
<th>Display Name</th>
<th>Timescale</th>
<th>User S</th>
<th>User F</th>
<th>Filter</th>
<th>Preview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Baseline Bar</td>
<td>Project Baseline Bar</td>
<td>Normal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Baseline Milestone</td>
<td>Project Baseline Bar</td>
<td>Milestone</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Baseline</td>
<td>Primary Baseline Bar</td>
<td>Normal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Baseline Milestone</td>
<td>Primary Baseline Bar</td>
<td>Milestone</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Remove all text from all bars, except from the Current Bar Labels bar, by:
- Clicking on the Bar Labels tab at the bottom,
- Clicking on one bar at a time and using the button at the bottom (NOT SIDE) of the screen to delete the text line,
- Change the Current Bar Labels bar filter to read All Activities and do not display.

3. Display the following bars:
- Remaining Level of Effort
- Actual Level of Effort
- Actual Work
- Remaining Work
- Remaining Critical Work
- Milestones
- % Complete
- Summary Bar
- Float Bar (Total Float)
- Negative Float Bar

4. Adding Columns:
- Add Calendar and Activity Type columns, from the General section of the Columns form, to the right of the Activity Name column.
- Adjust the column widths to the best fit by dragging the column header divider lines.
- Display the Total Float column if not displayed.

5. Press the F9 key and click the button which will schedule the project and calculate the float.

6. Adjusting Row Heights:
- Change the Row Height to 30 points by selecting View, Table Font and Row and apply,
- Now check the Optimize height by row content box, not exceeding 1 line per row and apply,
- Now change the setting to 18 point height for all rows and apply.
- Click on ✔ OK to close the form.
7. Format Timescale to Year and Month, then Week and Day (two options), then Month and Week by using the buttons.

8. Format the Vertical lines with a solid Major line every month and a Minor line every week by selecting View, Bars and clicking on the button and selecting the Sight Lines tab, or right-clicking in the Gantt Chart area and selecting Bar Chart Options... and selecting the Sight Lines tab.

9. Expand and contract the timescale and adjust it so that all the bars are visible.

10. See below for the expected results:

<table>
<thead>
<tr>
<th>Activity ID</th>
<th>Activity Name</th>
<th>Calendar</th>
<th>Activity Type</th>
<th>Original Duration</th>
<th>Start</th>
<th>Finish</th>
<th>Total Float</th>
</tr>
</thead>
<tbody>
<tr>
<td>C21000</td>
<td>Approval to Bid</td>
<td>CSW352D</td>
<td>Task Dependent</td>
<td>6d</td>
<td>09 Dec 24 16</td>
<td>13 Dec 24 16</td>
<td>3d</td>
</tr>
<tr>
<td>C21010</td>
<td>Determine Installation Requirements</td>
<td>CSW352D</td>
<td>Task Dependent</td>
<td>6d</td>
<td>09 Dec 24 16</td>
<td>13 Dec 24 16</td>
<td>3d</td>
</tr>
<tr>
<td>C21020</td>
<td>Create Technical Specification</td>
<td>CSW352D</td>
<td>Task Dependent</td>
<td>5d</td>
<td>09 Dec 24 16</td>
<td>13 Dec 24 16</td>
<td>3d</td>
</tr>
<tr>
<td>C21030</td>
<td>Design Supplier Components</td>
<td>CSW352D</td>
<td>Task Dependent</td>
<td>2d</td>
<td>09 Dec 24 16</td>
<td>10 Dec 24 16</td>
<td>3d</td>
</tr>
<tr>
<td>C21040</td>
<td>Review Technical Specification</td>
<td>CSW352D</td>
<td>Task Dependent</td>
<td>3d</td>
<td>09 Dec 24 16</td>
<td>10 Dec 24 16</td>
<td>3d</td>
</tr>
</tbody>
</table>

| Delivery Plan | | | |
|---------------|---------------|----------|---------------|-------------------|-------|--------|-------------|
| C21050        | Document Delivery Manual | CSW352D  | Task Dependent| 4d                | 09 Dec 24 16 | 13 Dec 24 16 | 4d          |
| C21060        | Obtain Quote from Suppliers | CSW352D  | Task Dependent| 6d                | 09 Dec 24 16 | 10 Dec 24 16 | 6d          |
| C21070        | Calculate the Bid Estimate | CSW352D  | Task Dependent| 2d                | 09 Dec 24 16 | 10 Dec 24 16 | 2d          |
| C21080        | Create the Project Schedule | CSW352D  | Task Dependent| 5d                | 09 Dec 24 16 | 15 Dec 24 16 | 5d          |
| C21090        | Review the Delivery Plan | CSW352D  | Task Dependent| 1d                | 09 Dec 24 16 | 09 Dec 24 16 | 1d          |

| Bid Document | | | |
|---------------|---------------|----------|---------------|-------------------|-------|--------|-------------|
| C21100        | Create Draft Bid Document | CSW352D  | Task Dependent| 6d                | 09 Dec 24 16 | 15 Dec 24 16 | 6d          |
| C21110        | Review Bid Document | CSW352D  | Task Dependent| 4d                | 09 Dec 24 16 | 10 Dec 24 16 | 4d          |
| C21120        | Finalize and Submit Bid Document | CSW352D  | Task Dependent| 2d                | 09 Dec 24 16 | 10 Dec 24 16 | 2d          |
| C21130        | Bid Document Submitted | CSW352D  | Task Dependent| 3d                | 09 Dec 24 16 | 09 Dec 24 16 | 3d          |

11. Check the following:

- Click on Activity ID to make sure they are ordered correctly,
- The dates and times of all activities should start and finish at the same time of the day,
- Activity OZ1060 bar should be colored red as it is the Critical activity representing the shortest duration that the project may be completed,
- All other activities should have Float.
9 ADDING RELATIONSHIPS

The next phase of a schedule is to add logic to the activities. There are two types of logic:

- Relationships (Dependencies or Logic or Links between activities), and
- Imposed Constraints to activity start or finish dates. These are covered in the Constraints chapter.

The Primavera Help file and other texts use the terms Relationships and Logic for Relationships but do not use the terms Dependencies or Links.

We will look at the following techniques in this chapter:

<table>
<thead>
<tr>
<th>Topic</th>
<th>Notes for creating a SF Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Graphically in the Bar Chart.</td>
<td>Drag the mouse pointer from one activity to another to create a dependency.</td>
</tr>
<tr>
<td>• By opening the Activity Details form.</td>
<td>Predecessor and Successors may be added and deleted from the Relationships, Predecessor or Successor tabs.</td>
</tr>
<tr>
<td>• By editing or deleting a dependency using the Edit Relationship form.</td>
<td>Double-click an activity link in the Bar Chart or Activity Network View.</td>
</tr>
</tbody>
</table>
| • Opening the Assign Predecessor form or the Assign Successor form from the menu. | • Select Edit, Assign, Predecessors…, or  
• Select Edit, Assign, Successors.… |
| • By displaying the Predecessor and/or Successor columns. | Double-clicking in the Predecessor or Successor cells will open the Assign Predecessor form or the Assign Successor form. |
| • Chain Linking or Automatically Linking activities with a Finish-to-Start relationship. | Select the activities in the order they are to be linked using the Ctrl key, right-click and select Link Activities. |

Relationships

There are two types of dependencies that are discussed in scheduling:

- **Hard Logic**, also referred to as Mandatory or Primary Logic, are dependencies that may not be avoided: for example, a footing excavation has to be prepared before concrete may be poured into it.
- **Soft Logic**, also referred to as Sequencing Logic, Discretionary Logic, Preferred Logic, or Secondary Logic, may be changed at a later date to reflect planning changes: for example, determining in which order the footing holes may be dug.

There is no simple method of documenting in Version 19 and earlier which is hard logic and which is soft logic as notes may not be attached to relationships. Version 20 has a new function title Relationship Comments that solves this issue.

A schedule with a large amount of soft logic has the potential of becoming very difficult to maintain when the plan is changed. As a project progresses, soft logic converts to hard logic due to commitments and commencing activities.

Microsoft Project allows one relationship between two activities, P6 four relationships between two activities and Elecosoft (Asta) Powerproject an unlimited number plus partial Critical Path calculation.

The AACE RP 24R-03 Developing Activity Logic is applicable to this chapter.
13 FILTERS

This chapter covers the ability of Primavera to control which activities are displayed, both on the screen and in printouts, by using Filters.

13.1 Understanding Filters
Primavera has the ability to display activities that meet specific criteria. You may want to see only the incomplete activities, or the work scheduled for the next couple of months or weeks, or the activities that are in-progress. Primavera defaults to displaying all activities.

There are a number of pre-defined filters available that you may use or edit. You may also create one or more of your own. A filter may be applied to display or to highlight only those activities that meet a criterion.

There are four types of filters:
- **Default** filters which are supplied with the system which may not be edited or deleted but may be copied and then edited or modified and are often used in conjunction with the display of bars.
- **Global** filters which are made available to anyone working in the database,
- **User Defined** filters which are defined by a user and available only to that user unless it is made into a Global filter, and
- **Layout** filters which make a copy of the filter which is only available the layout is applied to.

**NOTE:** If the current layout is a Project layout, then this effectively makes the Layout filter a project filter.

In addition:
- The **Group and Sort** function Show Summaries Only also works as a filter and displays only summaries (Bands), and no activities.
- The **View, Check Schedule** and **Activity Critical Path** options are both in effect predefined filters.

The following types of filters are not available:
- Drop-down or Auto filters as in Excel and Microsoft Project.
- Interactive filters as available in SureTrak, Elecosoft (Asta) Powerproject and Microsoft Project. This is when a filter is applied and the user is offered choices from a drop-down list. The lack of this function may result in an excessive quantity of filters being generated or the user continually editing frequently used filters.
- Project filters but copying all the filters used in a project to all the Project Layouts effectively creates Project filters but this is a lot of administration.

On the other hand, P6 does allow multiple filters to be applied at the same time.

**i**

There are no dedicated project filters (except by creating a Layout filter that have issues covered later) available in Primavera, so you might consider placing the project name or number at the start of a filter name so you may identify which filters belong to which projects. This is especially helpful when you have a number of User Filters or there are a number of Global Filters.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Menu Command</th>
</tr>
</thead>
</table>
| To apply, edit, create, or delete a filter open the Filters form. | - Click on the \( \text{T} \) icon, or  
- Select View, Filter By..., Customize, or  
- Right-click in the columns area and select Filters... |

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13.2 Applying a Filter

13.2.1 Filters Form
Filters are applied from the Filters form which may be opened by:

- Clicking on the icon, or
- Selecting View, Filters…, Customize… or
- Right-clicking in the columns area and selecting Filters…

NOTE: If the All Activities check box is not checked then there is a filter applied.

13.2.2 Applying a Single Filter
A single filter is applied by:

- Checking the Select check box beside one filter, and
- Clicking on the icon to apply the filter and not close the form. If the result is undesirable another option may be selected, or
- Clicking on to apply the filter and close the form.

- When applying the selected filter(s):
  - Only activities that comply to the filter criteria will be displayed when the Replace activities shown in the current layout button is checked.
  - These activities will be highlighted in the Select Activity color when the Highlight activities in current layout which match criteria button is checked.

13.2.3 Applying a Combination Filter
A combination filter has two or more filters selected and has two options under Show activities that match:

- All selected filters where an activity to be displayed or highlighted has to match the criteria of ALL the filters, or
- Any selected filters where an activity to be displayed or highlighted has to match the criteria of ONLY ONE filter.

In many places in the software there will be an option of either clicking on the icon or the icon:

- The icon applies the format yet leaves the form open.
- The icon applies the format and closes the form.
13.3 Creating and Modifying a Filter

13.3.1 Creating a New Filter
Filters may be created from the Filters form by:

- Clicking on the icon in the Filter form and create a new filter, or
- Copying an existing filter using the and icons and then editing the new filter.

New filters will be created in the User Defined filter area at the bottom of the list.

There are a large number of options available to create a filter and from the following examples you should be able to experiment and add your own filters. To modify an existing filter, select it from the Filters form and click the icon.

13.3.2 One Parameter Filter
The following example is a filter to display incomplete activities:

- **Parameter** is used to select any of the available database fields:
- Select one of the options from the drop-down box:
- The parameter selected in the box determines if:
  - Only one **Value** is required, which is entered into the **Value** field, or
  - A range is required and two values are to be entered; then the **Value** and **High Value** are entered.
The following example is a filter to display in-progress activities using the \textit{is not within range of} and \textit{Value} and \textit{High Value} options:

![Filter Example](image)

And this example uses the \textit{equals} parameter and only the \textit{Value} field is completed:

![Filter Example](image)

### 13.3.3 Two Parameter Filter

The following example is a filter to display all critical path activities and activities assigned the PM resource:

![Filter Example](image)

- The drop-down box under \textit{Parameter} has two options:
  - \textbf{(All of the following)}. This is used when an activity must meet all of the parameters selected below.
  - \textbf{(Any of the following)}. This is used when an activity must meet any of the parameters selected below.

When the first parameter is change to \textbf{All of the following} the \textit{Display all rows} option changes to an \textbf{AND}. Therefore, with the filter below there would normally be fewer activities displayed as the activities have to be critical and assigned the resource PM:
13.3.4  Multiple Parameter Filter

The following example is a filter to display incomplete activities on the critical path with resources PEH and SEH:

- In this example, (All of the following) was selected from the Parameters drop-down box which enables a nesting effect of filter parameters.

13.3.5  Editing and Organizing Filter Parameters

Lines in a filter are added, copied, pasted, and deleted using the appropriate icons in the Filters form.

The arrows allow the filter lines to be moved up and down and indented to the left and outdented to the right in a similar way to indenting and outdenting tasks in Microsoft Project.

A filter may be optimized to delete the redundant filter lines using the Optimize command:

13.3.6  Understanding Resource Filters

**NOTE: THIS IS A VERY IMPORTANT POINT FOR RESOURCE FILTERING**

When filtering on resources, the filter must use the option of contains in the Is column and not equals. This is because when an activity has been assigned more than one resource, then the activity will not be selected with a filter using the equals parameter.
13.4 Activity Critical Path Visibility

There is a new function and toolbar in Version 21 titled Activity Critical Path which may be used to examine both the Critical Path and other chains of non-critical activities.

- The new toolbar is displayed by right clicking on any toolbar and checking the Activity Critical Path option:

- This will display the toolbar:

- There is also a new menu item on the View menu:

**IMPORTANT NOTE:** Clicking on a button will activate the command and clicking again will deactivate the command.
The Oracle Cumulative Feature Overview file states:

To aid in the resolution of delayed critical paths before they become project over-runs, P6 Professional can show:

- Activities on up to 30 activity-driven critical paths, calculated on the forward pass, backward pass, or forward and backward passes (with or without resource leveling).

- The activities on up to 30 resource driven critical paths, calculated on the backward pass with resource leveling.

This Oracle description is not clear and we will work through the icons one at a time and explain how the functions work.

The schedule we will work with is as per below where Activity A1100 is preceded and succeeded by three chains of events with differing Total Float Values:

Users should also consider using the Activity Critical Path function in conjunction with the Float Path Order function to provide a clear view of the Float Paths:
**Command**

**Function**

This option displays the chain of events before a selected activity that has the least amount of Float.

If there is a critical path it will display this and if there is not, then it will find the chain of events with the least amount of float to the start of the project and display this as the **Backward Activity Critical Path**.

The picture below displays the **Backward Activity Critical Path** from activity A1100 which is a chain of events that is on the schedule Critical Path.

This option displays the chain of events after a selected activity that has the least amount of Float.

If there is a critical path it will display this path and if there is not, then it will find the chain of events with the least amount of float to the end of the project and display this as the **Forward Activity Critical Path**.

The picture below displays the **Forward Activity Critical Path** from activity A1100 which is a chain of events that is on the schedule Critical Path.

This option displays the chain of events before and after a selected activity that has the least amount of Float.

Thus, the picture below shows both the **Forward Activity Critical Path** and **Backward Activity Critical Path** from Activity A1100.
This increases the value of the **Maximum Multiple Critical Path Counts** which is displayed in the button below.

### Increase Maximum Multiple Critical Path Counts

This button is not a command button but displays the number of **Maximum Critical Paths** that has been set by the user.

**Selecting one as Maximum Critical Path Count:**

<table>
<thead>
<tr>
<th>Activity ID</th>
<th>Original Duration</th>
<th>Total Float</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1100</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>A1170</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>A1180</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>A1190</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>A1200</td>
<td>8</td>
<td>0</td>
</tr>
<tr>
<td>A1140</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>A1150</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>A1160</td>
<td>4</td>
<td>3</td>
</tr>
</tbody>
</table>

Selecting two as Maximum Critical Path Count:

<table>
<thead>
<tr>
<th>Activity ID</th>
<th>Original Duration</th>
<th>Total Float</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1100</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>A1170</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>A1180</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>A1190</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>A1200</td>
<td>8</td>
<td>0</td>
</tr>
<tr>
<td>A1140</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>A1150</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>A1160</td>
<td>4</td>
<td>3</td>
</tr>
</tbody>
</table>

Selecting three as Maximum Critical Path Count:

<table>
<thead>
<tr>
<th>Activity ID</th>
<th>Original Duration</th>
<th>Total Float</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1100</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>A1170</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>A1180</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>A1190</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>A1200</td>
<td>8</td>
<td>0</td>
</tr>
<tr>
<td>A1140</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>A1150</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>A1160</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>A1110</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>A1120</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>A1130</td>
<td>3</td>
<td>6</td>
</tr>
</tbody>
</table>

Thus, this command determines how many chains of events will be displayed, consider also using the **Float Path Order** here.

This decreases the value of the **Maximum Multiple Critical Path Counts** which is displayed in the button above.

---

*Sample book with two chapters*
This opens a form allowing the setting of the **Maximum Multiple Critical Path Counts**:

![Select Maximum Multiple Critical Path Count Form]

Clicking this button hides and displays the current applied **Group and Sort bands**. Hiding the bands enables the user to see the chain of events as an uninterrupted single chain of activities:

**Group and Sort enabled:**

<table>
<thead>
<tr>
<th>Activity ID</th>
<th>Activity Name</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>EC2340</td>
<td>Substantial Completion - All TCO</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
</tr>
<tr>
<td>Building 1</td>
<td>Complete Building 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Envelope</td>
<td>Shell Complete</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roads, Utilities &amp; Pavers</td>
<td>Entry Feature/Sign Wall</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Group and Sort disabled:**

<table>
<thead>
<tr>
<th>Activity ID</th>
<th>Activity Name</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>EC2340</td>
<td>Substantial Completion - All TCO</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EC2260</td>
<td>Entry Feature/Sign Wall</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
</tr>
<tr>
<td>EC2340</td>
<td>Substantial Completion - All TCO</td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
</tr>
<tr>
<td>EC2440</td>
<td>Complete Building 1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This single Float Path is not on the critical path.
The schedule below has no relationships between activities and have been levelled.

<table>
<thead>
<tr>
<th>Activity ID</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1000</td>
<td>Paul Harris</td>
</tr>
<tr>
<td>A1010</td>
<td>Paul Harris</td>
</tr>
<tr>
<td>A1020</td>
<td>Paul Harris</td>
</tr>
<tr>
<td>A1030</td>
<td>Paul Harris</td>
</tr>
<tr>
<td>A1040</td>
<td>Paul Harris</td>
</tr>
</tbody>
</table>

When selecting A1040 and **Backward Activity Critical Path** you will see the result below:

<table>
<thead>
<tr>
<th>Activity ID</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1040</td>
<td>Paul Harris</td>
</tr>
</tbody>
</table>

When selecting A1040 and **Backward Resource Driven Critical Path** you will see the result below:

<table>
<thead>
<tr>
<th>Activity ID</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1000</td>
<td>Paul Harris</td>
</tr>
<tr>
<td>A1010</td>
<td>Paul Harris</td>
</tr>
<tr>
<td>A1020</td>
<td>Paul Harris</td>
</tr>
<tr>
<td>A1030</td>
<td>Paul Harris</td>
</tr>
<tr>
<td>A1040</td>
<td>Paul Harris</td>
</tr>
</tbody>
</table>
13.5 Workshop 11 – Filters

Background

Management has asked for reports on activities to suit their requirements.

Assignment

Ensure your OzBuild Bid project is open.

1. Apply the OzBuild Workshop 10 – With Float layout.

2. They would like to see all the critical activities.
   - Ensure a column showing the Total Float is displayed, and
   - Apply the Critical activities filter.

3. You will see only activities that are on the critical path.

4. Open the Group and Sort form and check the Hide if empty box and notice the Technical Specification band is hidden because it has no activities displayed.

5. Now apply some other filters such as the Milestone, Has Start Constraint and Has Finish Constraint.

6. There are two activities with 6 days Total Float, OZ1040, OZ1050 and OZ1100, see the picture below:
7. Management would like to see all the activities with float less than or equal to 5 days:
   - Create a new filter titled: Total Float Less Than or Equal to 5 Days, and
   - Add the condition to display a total float of less than 5 days.
   - Close the Filter form,
   - Click on the All Activities check box to ensure all activities are displayed,
   - Apply the new filter Total Float Less Than or Equal to 5 Days,
   - You should find that three activities with more than 6 days float are hidden:

8. They would like to see all the activities that are critical or contain the word “Bid”.
   - Copy the Critical filter,
   - Edit the filter title to read: Critical or Contains “Bid”,
   - Edit the top line to read (Any of the following),
Add the condition: Or Name (Activity Name) contains Bid, and

Note: The text is not case sensitive,

Apply the filter.

9. All the activities are either Critical or contain the word Bid.
10. Copy the filter and rename it Critical and Contains “Bid”.
11. Now change the (Any of the following) option to (All of the following) apply the filter and see the effect.
12. There should be fewer activities and it is now displaying activities that meet both conditions of being Critical and contain the word Bid.
13. Now apply the All Activities filter to display all the activities.
29 TOPICS NOT COVERED IN THIS PUBLICATION

The following topics are not covered in this publication:

- Budgets, including:
  - Budget Summary
  - Budget Log
  - Funding
  - Spending Plan
- Issues
- Risks and Risk Calculation
- External Applications
- Timesheets
- Timesheet Date Administration.
30 INDEX

% Complete bar, 103
% Lag, 128
0/100, 441
50/50, 441
AACE International, 5
AC, 437
Access Mode, 417
Accrual Type, 322
Active Project, 80
Activities Window, 29
Activity
Add, 85
Assigning Calendars, 94
Auto Compute Actuals, 297, 298
Bars Formatting, 100, 102
Boxes - Formatting, 144
Calendar, 63, 356
Code Color, 376
Codes, 77, 373
Codes Definition form, 373, 374, 375
Codes form, 374, 375
Codes Maximum Number, 276
Copy, 91
Description, 93
Details form, 126, 131, 143, 150, 153, 154
Discussion, 94, 432
Dissolving, 133
Duration, 320
ID, 93
ID Prefix, 90
ID Suffix, 90
Increment, 90
Information, 93
In-Progress, 246, 247
Layout, 173
Leveling Priority, 337
Lifecycle, 246
Network, 142, 144, 173
Network Options, 144
Network Window, 144
nonwork intervals, 110, 254
Notebook, 153
Percent Complete, 87, 103, 249
Recording, 96
Sorting, 96
Status tab, 151
Summarizing, 81
Table, 173
toolbar, 130
Type, 20, 60, 63, 88
Type - Resource Dependent, 63
Usage Profile, 329
Window, 359
Activity percent complete based on activity steps, 358
Actual
Costs, 437
Costs and Quantities, 356
Dates (similar to Retained Logic), 225
Duration, 247, 356
Finish, 244, 249
Start, 244, 246, 247, 249
Actual this period, 358
Actual to date, 358
Actuals form, 366
Add
New Activities, 85, 90
New Activity Defaults, 86
New Baseline form, 232
New Filter, 179
New Layout, 171
Notebook Topics, 154
Notes, 154
Relationships, 126
Resources, 294
WBS, 79
Added Date, 423
Additional Activities View, 436
Additional Project Information, 57
Adjust to - Printing, 193
ADM, 12
Admin
Categories, 281
Menu, 272
Preferences, 274
Users, 299
Admin Categories form, 57
Admin form, 272
Admin Preferences form, 231, 274
Advanced Schedule Options form, 128
All Projects use their own data dates, 135, 255, 415, 452
Always recalculate, 253
Always show full menus, 34, 35, 45
anp File Type, 53, 144  
Anticipated Dates, 78  
Project, 56  
WBS, 80  
Application Log File, 268  
Application Startup Window, 25, 267  
Application tab, 267  
Apply Actuals, 366, 408  
Apply selected data date to all open projects, 135, 255, 415, 452  
Applying  
Combination Filter, 178  
Layout, 170  
Single Filter, 178  
Arrow Diagramming Method, 12  
As Of Date, See Current Data Date.  
Assign  
Calendars to Activities, 94  
Constraints, 150  
Resources, 323  
Roles, 316  
Assign Activity Codes form, 376  
Assign Notebook Topic form, 57  
Assign Predecessor form, 126, 132  
Assign Resource form, 318  
Assign Resources By Roles form, 317  
Assign Roles form, 316, 317  
Assign Successor form, 126, 132  
Assigned by, 423  
Assigned Date, 423  
Assignment Codes, 384, 454  
Assignment Defaults, 305  
Assignment Staffing, 270  
Assistance tab, 267  
At Completion Duration, 247  
At Completion values with current dates, 235, 438  
Attachments Inserting, 119  
Audit Trial Columns, 423  
Auto Compute Actuals, 297, 366  
Automatic Calculation, 135  
Automatically level resources when scheduling, 336  
Auto-numbering Defaults, 85, 90  
Auto-Reorganization, 168  
Autostatus, 251  
Bands WBS, 97  
Bar Chart Options form, 111, 140  
Bar form, 100, 110, 238, 255  
Bar Format Style, 102  
Bar Necking, 110  
Bars form, 110  
Based on the activity duration type, 253  
Baseline, 4, 214, 244  
Bars, 255  
Comparing to Progress, 255  
Costs, 355  
Dates, 355  
Delete, 232  
Displaying, 238  
Duration, 355  
Form, 232  
Maximum Number, 231, 276  
Restoring, 232  
Saving, 232  
Setting, 234  
Type, 232, 281  
Update, 233  
Work, 355  
Baseline for earned value calculations option, 448  
Batch Reports, 198, 408  
Bottom Layout, 93  
Bottom Layout toolbar, 172  
Break Page Every Group - Printing, 196  
Bucket Planning, 330  
Budget Log, 80  
Quantity, 355  
Summary, 80  
Budget values with current dates, 438  
Budget values with planned dates, 236, 439  
Calculate Costs from Units, 298  
Calculate float based on either, 416  
Calculate start-to-start lag from, 226  
Calculating Multiple Paths, 411, 422  
Calculation  
Automatic, 135  
Manual, 135  
Calculation form, 270, 315  
Calculations tab, 270, 307, 309, 319  
Calendar, 296  
Activity, 63, 356  
Assigning, 94  
Copy, 65  
Create, 62, 63  
Database Default, 61  
Default Activity, 61, 89  
This publication is only sold as a bound book, no parts may be reproduced by any means, e.g., electronic, video or print.  
© Eastwood Harris Pty Ltd
Delete, 66
For Scheduling Relationship Lag, 230
form, 61, 66, 68
Global, 61, 65, 89
Inherit Holidays and Exceptions from a Global Calendar, 67
Lag, 128
Nonwork time, 110
Project, 61, 62, 89
Renaming, 66
Resource, 60, 63, 356
Resource Dependent, 60, 65
Shared Resource, 63
Used By form, 66
Weekly Hours, 68
CBS(Contract Breakdown Structure), 373
Chain Linking, 133
Change the user password, 269
Check In, 431
Check Out, 55, 431
Circular Relationship, 134
Claim Digger, 40, 200, 210, 279
Closed Network, 13
Closing Down, 44
COA, 373
Code Activity, 77
Code of Accounts, 373
Code Separator, 275
Codes
Activity, 373
Resource, 382
Codes tab, 374, 406
Collapse All, 26
Collapse To…, 26
Collapsed Bar tab, 112
Colors Formatting, 100, 121
Column
Formatting, 100, 115
Title Alignment, 115
Width, 116
Column form, 100, 115, 116
Combination Filter Applying, 178
Command toolbar, 97, 133
Comments Relationships, 137, 451
Commit Changes, 44
Comparing Progress With Baseline, 255
Compute Total Float as, 229
Concentric (P3), 54
Confirmation form, 151
Consent Notice, 280, 450
Consider assignments in other projects with priority equal/higher than, 336
Constraint, 127, 148
As Late As Possible, 149
Expected Finish, 149
Finish Constraint, 148
Finish On, 149
Finish On or After, 149
Finish On or Before, 149
Mandatory Finish, 149
Mandatory Start, 149
Must Finish By date, 153
None, 149
Primary, 148
Primary Start, 150
Secondary, 148, 150
Start No Earlier Than, 148
Start On, 149
Start On or After, 149
Start On or Before, 149
Constraints, 16
Contingent Time, 17
Contract Breakdown Structure, 373
Contract Management, 43
Copy
Activity, 91
Calendar, 65
OBS with project, 267
Visualizer Layouts, 460
WBS, 79
Copy Activity Options form, 52, 92
Copy Project Options form, 52
Copy WBS Options form, 52, 79
Cost Account, 89, 321, 383
Cost Accounts form, 383
Cost and Units Budget Values, 354
Cost Breakdown Structure, 373
Cost Spread, 43, 278, 291, 456
Cost units linked, 298
CPP File Format, 54, 430, 463
Create
Activity Codes, 374, 375
New Project, 51
Reflection Project, 421
Roles, 288
Single View, 171
Users, 404
Critical Path, 13, 135, 145
<table>
<thead>
<tr>
<th>Currencies form, 282</th>
<th>Dependencies, 126</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currency, 296, 401</td>
<td>Details form, 56, 57, 87, 248</td>
</tr>
<tr>
<td>Currency Options form, 266</td>
<td>Details Status form, 309</td>
</tr>
<tr>
<td>Current Data Date, 214, 249, 255, 354, 356</td>
<td>Disable Auto-Reorganization, 168</td>
</tr>
<tr>
<td>Current Schedule, 236</td>
<td>Discretionary dependencies, 12</td>
</tr>
<tr>
<td>Curtain, 119, 120</td>
<td>Discussion, 94, 432</td>
</tr>
<tr>
<td>Curtain Attachment form, 120</td>
<td>Discussion tab, 432</td>
</tr>
<tr>
<td>Curtains, 200, 204, 207</td>
<td>Displaying Multiple Paths, 423</td>
</tr>
<tr>
<td>Curves Resource, 346</td>
<td>Dissolving Activities, 133, 271</td>
</tr>
<tr>
<td>Custom Label 1 to 3, 195</td>
<td>Document Categories, 281</td>
</tr>
<tr>
<td>Custom percent complete, 441</td>
<td>Document Security, 278, 455</td>
</tr>
<tr>
<td>Customizable menus, 35</td>
<td>Document Status, 281</td>
</tr>
<tr>
<td>Customizable Toolbars, 33</td>
<td>Drive activity dates by default, 305, 307</td>
</tr>
<tr>
<td>Customize (Toolbar) form, 33</td>
<td>Driving Relationships, 145</td>
</tr>
<tr>
<td>Customize Project Details, 27</td>
<td>Duration</td>
</tr>
<tr>
<td>Customize User Defined Fields, 380</td>
<td>Actual, 247, 356</td>
</tr>
<tr>
<td>Data Date, 18, 56, 113, 244, 356, 414</td>
<td>At Completion, 247</td>
</tr>
<tr>
<td>Data Date formatting, 113, 214, 244</td>
<td>Elapsed, 93, 128</td>
</tr>
<tr>
<td>Data Date tab, 113</td>
<td>Format, 265</td>
</tr>
<tr>
<td>Data Limits tab, 276</td>
<td>In-Progress Activity, 247</td>
</tr>
<tr>
<td>Data Type, 381</td>
<td>Original, 247</td>
</tr>
<tr>
<td>Database</td>
<td>Percent Complete Type, 361</td>
</tr>
<tr>
<td>Default Calendar, 61, 72</td>
<td>Remaining, 247</td>
</tr>
<tr>
<td>Microsoft SQL Server, 53</td>
<td>Type, 86, 313, 314</td>
</tr>
<tr>
<td>Oracle, 53</td>
<td></td>
</tr>
<tr>
<td>Date Checked Out, 55</td>
<td>Early Finish, 145</td>
</tr>
<tr>
<td>Date Filters, 275</td>
<td>Early Start, 145</td>
</tr>
<tr>
<td>Date Format, 36</td>
<td>Earned Value, 80, 234, 437, 440</td>
</tr>
<tr>
<td>Date Interval, 118</td>
<td>Earned value calculation, 235, 329, 365, 438, 447, 448</td>
</tr>
<tr>
<td>Date Picker, 37, 456</td>
<td>Earned Value tab, 277</td>
</tr>
<tr>
<td>Dates tab, 266</td>
<td></td>
</tr>
<tr>
<td>Default</td>
<td>Edit</td>
</tr>
<tr>
<td>Activity Calendar, 61, 89</td>
<td>Column form, 115</td>
</tr>
<tr>
<td>Activity duration, 275</td>
<td>Column Title form, 116, 131</td>
</tr>
<tr>
<td>Auto-numbering, 90</td>
<td>Database Connections form, 24</td>
</tr>
<tr>
<td>Calendar, 401</td>
<td>Filter, 179</td>
</tr>
<tr>
<td>New Activities, 86</td>
<td>Relationship form, 126, 130</td>
</tr>
<tr>
<td>Project, 61, 413</td>
<td>Resource Usage Spreadsheet, 330</td>
</tr>
<tr>
<td>Resource Rates, 305</td>
<td>toolbar, 79, 142, 143</td>
</tr>
<tr>
<td>Units/Time, 297</td>
<td>Working Days, 66</td>
</tr>
<tr>
<td>Default Price/Unit for activities without resource or role Price/Units, 358</td>
<td>Working Hours, 68</td>
</tr>
<tr>
<td>Default Project, 416</td>
<td>Elapsed Duration, 74, 93, 128</td>
</tr>
<tr>
<td>Default Project Schedule Options, 413</td>
<td>E-mail Protocol form, 267</td>
</tr>
<tr>
<td>Define critical activities as, 226</td>
<td>Enterprise</td>
</tr>
<tr>
<td>Delete</td>
<td>Group and Sort, 169</td>
</tr>
<tr>
<td>Baseline, 232</td>
<td>Project Management, 8</td>
</tr>
<tr>
<td>Calendar, 66</td>
<td>Project Structure (EPS), 8, 402</td>
</tr>
<tr>
<td>WBS, 79</td>
<td>Enterprise Project Structure form, 26</td>
</tr>
<tr>
<td></td>
<td>Enterprise toolbar, 197</td>
</tr>
</tbody>
</table>
Assign Predecessor, 126, 132
Assign Resource, 318
Assign Resources By Roles, 317
Assign Roles, 317
Assign Successor, 126, 132
Bar, 100
Bar Chart Options, 111, 140
Bars, 110, 238, 255
Baselines, 232
Calculations, 270, 315
Calendar, 61, 66, 68
Calendar Used By, 66
Column, 95, 100, 115, 116
Confirmation, 151
Copy Activity Options, 52, 92
Copy Project Options, 52
Copy WBS Options, 52, 79
Cost Accounts, 383
Currencies, 282
Currency Options, 266
Curtain Attachment, 120
Customize (Toolbar), 33
Details, 56, 87, 248, 250
Details Status, 309
Edit Column, 115
Edit Column Title, 116, 131
Edit Database Connections, 24
Edit Relationship, 126, 130
E-mail Protocol, 267
Enterprise Project Structure, 26
Filter By, 317
Filters, 103, 177, 178, 179, 181
Font and Color, 166
Font and Rows, 100
Group and Sort, 162, 163, 196
HTML, 192
Layout, 110, 170
Level Resources, 336
Login, 24
Maintain Baselines, 232
Open Project, 30, 400, 402
Organizational Breakdown Structure, 273, 400, 403
Page Setup, 192, 193, 194
Predecessor, 131
Print, 192, 197
Print Setup, 197
Project Codes, 406
Project Details, 27, 55, 86
Relationship, 143
Renumber Activity ID based on selected activities, 92
Renumber Activity IDs, 79
Report Headers and Footers, 277
Reports Groups, 197
Resource Codes, 382
Resource Rate Types, 278
Resources Details, 316
Role Codes, 291, 385
Roles, 288
Schedule, 135, 244, 255
Schedule Options, 220
Security Profiles, 274
Select Code, 376
Select Project, 232
Set Default Project, 283
Sort, 96, 167
Store Period Performance, 443
Timescale, 117
Trace Logic Options, 173
User Password, 269
User Preferences, 265, 308, 323
Users, 273
WBS, 95
WBS Options, 79
Format
Activity Bars, 100, 102
Activity Boxes, 144
Bar Style, 102
Colors, 100, 121
Column Width, 116
Columns, 100, 115
Data Date, 113
Display, 100
Durations, 265
Font Colors, 121
Fonts, 100, 121
Gridlines, 100
Project Window, 101
Row Height, 100, 116
Timescale, 100, 117
Units, 265
Free Float, 14, 135
Freeze Units per Time Period, 346
Gantt Chart Layout, 172
General tab, 275
Ghost Relationships, 419, 420
Global
Calendar, 61, 65, 89, 296
Profile, 274, 405
Profiles, 405
Global Access tab, 411
Global Change, 388
Functions, 395
Parameters, 395
Report, 388
Temporary Values, 395
Government, Aerospace, and Defense, 40, 279
Grand Totals, 164
Gridlines Colors, 121
Gridlines Formatting, 100
Group and Sort
Activities, 163
Enterprise, 169
Group and Sort form, 162, 163, 196
Group By, 165
Group Interval, 166
Group Resources, 286
Grouping, 77
Handoffs, 433
Hard Constraint, 149
Hard Logic, 12, 126
Harmful Files, 455
Header and Footer, 194
Header Label 1 to 3, 195
Help, 42
Help What's New, 42
Hide if empty, 82, 167
High-Technology, 40, 279
Hint Help, 43
Histogram, 447
Histogram, Stacked, 332, 410
Icons, 116
ID Lengths tab, 276
Ignore relationships to and from other projects, 221
Import, 424
Import File, 54
Importing a Project, 53
Importing Activity Codes with Excel, 378
Inactive Project, 80
Inactive Resources, 270
Individual Resources, 286
Industry Type, 39, 279
Inherit Holidays and Exceptions from a Global Calendar, 67
In-Progress Activities, 11, 246
Input Resources, 286
Inserting Attachments, 119
Interval for time-distributed calculations, 269
IPMDAR File Format, 54, 430, 456
Job Alert Polling, 268
Job Services, 408, 409
Jumping to an activity, 132
Ladder scheduling, 137
Lag, 12, 128
Lag for Calendar, 128
Language, 284
Late Budget, 440
Late Finish, 145
Late Start, 145
Layout, 169
Activity Details, 172
Activity Network, 172
Applying, 170
Gantt Chart, 172
New, 171
Trace Logic, 173
Types, 172
Layout form, 110, 170
Lead, 12, 128
Lean Tasks, 433, 453
Level of Effort, 88, 311
Level of Plans, 6
Level Resources form, 336
Level resources only within activity Total Float, 336
Leveling, 335
Leveling priorities - resources, 336
Leveling Priority - project, 55
Licensing, 273
Linear Spread, 292
Link Activities, 133
Link Actual to date and Actual This Period Units and Cost, 358, 363, 443
Link Budget and At Completion for not started activities, 217, 247, 304, 358
Links, 126
Load Financial Period Data, 268
Lock All Toolbars, 34
Logging In, 24
Logic, 126
Hard, 126
Links, 12
Looping, 13
Preferred, 126
Primary, 126
Secondary, 126
Sequencing, 126
Soft, 126
Login, 273
Login form, 24
Longest Path, 227
Looping Logic, 13
Maintain Baselines form, 232
Maintain Relationships with External Projects, 433
Make open-ended activities critical, 222
Mandatory dependencies, 12
Manual Calculation, 135
Manufacturing Week, 118
Margins - Printing, 194
Mark-up Sheet, 245, 357
Material Resources, 296
Menus Customizable, 35
Merge Reflection into source project, 421
Merge WBS, 79
Methodology Manager, 51
Microsoft SQL Server Database, 53
Milestones, 88
  Finish, 88
  Start, 88
Modified By, 423
Modified Date, 423
Move Toolbar, 79
mpp File Type, 54, 429
mpx File Type, 54, 429
Must Finish By date, 51, 56, 153, 336
myPrimavera, 81
myPrimavera Server URL, 278
Necking, 110
Negative Float display, 103
Negative Lag, 12, 128
New
  Activity Defaults, 86
  Data Date, 253
  Layout, 171
Node Separator, 80
Nonwork Days, 69
Nonwork Period Shading in Timescale, 119
Notebook, 80
  Activity, 153
  Add Notes, 154
  Topic, 57
  Topic display on Gantt Chart, 111
  Topics, 154
  Notes tab, 299
OBS, 403
  General tab, 403
  Responsibility tab, 403
  Users tab, 403
OBS copy with project, 267
Online HTML Help, 432
Open Projectform, 30, 400, 402
Opened Project, 116
Optimize filter, 181
Optional Client, 1, 22
Options tab, 278
Options tab - Printing, 196
Oracle Database, 53
Oracle Technology Network - OTN, 432
Ordinals, 118
Organization Breakdown Structure, 274, 373
Organizational Breakdown Structure, 403
Organizational Breakdown Structure form, 273, 400, 403
Organizing Filter Parameters, 181
Original Duration, 247
Original Duration, Resource, 306
Original Lag, Resource, 306
OTN - Oracle Technology Network, 432
Outlining, 373
Output Resources, 287
Overtime, 296
P3, 429
Page
  Breaks, 168
  Numbering - Printing, 193
  Setup, 193
  Setup form, 192, 193, 194
Page Tab - Printing, 193
Parameter Filter, 179
Parameter/Value for Global Changes, 395
Password Policy, 275
Password tab, 269
Past Period Actuals, 444
PBS - Project Breakdown Structure, 10
pcf File Type, 53
PDM, 12
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent Complete, 86, 248</td>
<td></td>
</tr>
<tr>
<td>Activity % Complete, 87, 249</td>
<td></td>
</tr>
<tr>
<td>Default % Complete, 87, 248</td>
<td></td>
</tr>
<tr>
<td>Duration % Complete, 87, 248</td>
<td></td>
</tr>
<tr>
<td>Performance % Complete, 440</td>
<td></td>
</tr>
<tr>
<td>Physical % Complete, 87, 248</td>
<td></td>
</tr>
<tr>
<td>Units % Complete, 87, 249</td>
<td></td>
</tr>
<tr>
<td>Updating, 365</td>
<td></td>
</tr>
<tr>
<td>Percent Complete Type, 86</td>
<td></td>
</tr>
<tr>
<td>Duration, 361</td>
<td></td>
</tr>
<tr>
<td>Physical, 360</td>
<td></td>
</tr>
<tr>
<td>Units, 362</td>
<td></td>
</tr>
<tr>
<td>Performance % Complete, 440</td>
<td></td>
</tr>
<tr>
<td>Performance Measurement Baseline, 437, 438</td>
<td></td>
</tr>
<tr>
<td>Personal Information, 271, 450</td>
<td></td>
</tr>
<tr>
<td>PERT, 127, 142</td>
<td></td>
</tr>
<tr>
<td>PERT View, 126</td>
<td></td>
</tr>
<tr>
<td>pfc File Type, 389</td>
<td></td>
</tr>
<tr>
<td>Phases, 6</td>
<td></td>
</tr>
<tr>
<td>Physical Percent Complete Type, 360</td>
<td></td>
</tr>
<tr>
<td>Planned Dates, 236</td>
<td></td>
</tr>
<tr>
<td>Planned Project, 80</td>
<td></td>
</tr>
<tr>
<td>Planned Start, 51, 56</td>
<td></td>
</tr>
<tr>
<td>Planned Value, 437, 439</td>
<td></td>
</tr>
<tr>
<td>Planning Board, Primavera Cloud, 433</td>
<td></td>
</tr>
<tr>
<td>Planning Cycle, 4</td>
<td></td>
</tr>
<tr>
<td>Planning Resources, 81</td>
<td></td>
</tr>
<tr>
<td>plf File Type, 174, 200</td>
<td></td>
</tr>
<tr>
<td>PMB, 437</td>
<td></td>
</tr>
<tr>
<td>PMBOK® Guide, 6</td>
<td></td>
</tr>
<tr>
<td>Portfolio, 30, 400, 402</td>
<td></td>
</tr>
<tr>
<td>Portfolio Analysis, 269</td>
<td></td>
</tr>
<tr>
<td>Precedence Diagramming Method, 12</td>
<td></td>
</tr>
<tr>
<td>Predecessor, 127</td>
<td></td>
</tr>
<tr>
<td>Predecessor form, 131</td>
<td></td>
</tr>
<tr>
<td>Preferred Logic, 126</td>
<td></td>
</tr>
<tr>
<td>Preserve scheduled early and late dates, 336</td>
<td></td>
</tr>
<tr>
<td>Preserve the Units, Duration, and Units/Time for existing assignments, 270</td>
<td></td>
</tr>
<tr>
<td>Primary Logic, 12, 126</td>
<td></td>
</tr>
<tr>
<td>Primary Role, 288</td>
<td></td>
</tr>
<tr>
<td>Primary Start, 150</td>
<td></td>
</tr>
<tr>
<td>Primavera Change File pcf, 389</td>
<td></td>
</tr>
<tr>
<td>Primavera Cloud, 22</td>
<td></td>
</tr>
<tr>
<td>Primavera Project Planner P3, 54</td>
<td></td>
</tr>
<tr>
<td>Primavera Web, 81, 278</td>
<td></td>
</tr>
<tr>
<td>PRINCE2, 6</td>
<td></td>
</tr>
<tr>
<td>Print Toolbar, 192</td>
<td></td>
</tr>
<tr>
<td>Printing, 191</td>
<td></td>
</tr>
<tr>
<td>Adjust to;, 193</td>
<td></td>
</tr>
<tr>
<td>Break Page Every Group, 196</td>
<td></td>
</tr>
<tr>
<td>Fit timescale to;, 193</td>
<td></td>
</tr>
<tr>
<td>Fit to, 193</td>
<td></td>
</tr>
<tr>
<td>form, 192</td>
<td></td>
</tr>
<tr>
<td>Header and Footer, 194</td>
<td></td>
</tr>
<tr>
<td>Margins, 194</td>
<td></td>
</tr>
<tr>
<td>Options tab, 196</td>
<td></td>
</tr>
<tr>
<td>Page Numbering, 193</td>
<td></td>
</tr>
<tr>
<td>Page Setup, 191, 192, 193</td>
<td></td>
</tr>
<tr>
<td>Preview, 192</td>
<td></td>
</tr>
<tr>
<td>Print Preview, 191, 192</td>
<td></td>
</tr>
<tr>
<td>Publish to HTML, 192</td>
<td></td>
</tr>
<tr>
<td>Scaling, 193</td>
<td></td>
</tr>
<tr>
<td>Section Content, 195</td>
<td></td>
</tr>
<tr>
<td>Timescale Start and Timescale Finish:, 196</td>
<td></td>
</tr>
<tr>
<td>Zoom, 192</td>
<td></td>
</tr>
<tr>
<td>Priority – Activity Leveling, 337</td>
<td></td>
</tr>
<tr>
<td>Professional Client, 22</td>
<td></td>
</tr>
<tr>
<td>Proficiency, 20, 288, 299</td>
<td></td>
</tr>
<tr>
<td>Profile, 405</td>
<td></td>
</tr>
<tr>
<td>Global, 274</td>
<td></td>
</tr>
<tr>
<td>Project, 274</td>
<td></td>
</tr>
<tr>
<td>Program Plan, 6</td>
<td></td>
</tr>
<tr>
<td>Progress</td>
<td></td>
</tr>
<tr>
<td>Calculation Summary, 249</td>
<td></td>
</tr>
<tr>
<td>Override, 224, 225</td>
<td></td>
</tr>
<tr>
<td>Recording, 245</td>
<td></td>
</tr>
<tr>
<td>Spotlight, 251</td>
<td></td>
</tr>
<tr>
<td>Tracking, 18</td>
<td></td>
</tr>
<tr>
<td>Progress Line, 256</td>
<td></td>
</tr>
<tr>
<td>Progress Line Display, 113, 114</td>
<td></td>
</tr>
<tr>
<td>Progress Reporter tab, 275</td>
<td></td>
</tr>
<tr>
<td>Project</td>
<td></td>
</tr>
<tr>
<td>Access, 273</td>
<td></td>
</tr>
<tr>
<td>Architect, 51, 278</td>
<td></td>
</tr>
<tr>
<td>Bar Charts, 409</td>
<td></td>
</tr>
<tr>
<td>Baseline, 234</td>
<td></td>
</tr>
<tr>
<td>Breakdown Structure, 10, 77, 373</td>
<td></td>
</tr>
<tr>
<td>Calendar, 61, 62, 89</td>
<td></td>
</tr>
<tr>
<td>Codes form, 406</td>
<td></td>
</tr>
<tr>
<td>Dates, 56</td>
<td></td>
</tr>
<tr>
<td>Details form, 27, 55, 86</td>
<td></td>
</tr>
<tr>
<td>Finish Date, 56</td>
<td></td>
</tr>
<tr>
<td>Gantt/Profiles, 410</td>
<td></td>
</tr>
<tr>
<td>ID, 51</td>
<td></td>
</tr>
<tr>
<td>Leveling Priority, 55</td>
<td></td>
</tr>
<tr>
<td>Must Finish By date, 152</td>
<td></td>
</tr>
</tbody>
</table>
Limit, 346
Nonlabor, 303
Original Duration, 306
Original Lag, 306
Output, 287
Proficiency, 299
Quantity, 304
Rate Type, 51, 305
Rate Types form, 278
Removing, 318
Shifts, 299, 341
tab, 305
Types, 295
Updating, 365
Usage Profile, 332
Usage Profile Options, 332
Usage Spreadsheet, 330
Resource/Time Format, 266
Resources
tab, 366
Resources Window, 64, 285, 293
Responsible Manager, 51, 80, 267
Restoring a Baseline, 232
Resume, 254
Retain Lag, 133, 271, 451
Retained Logic, 224, 225
Risk Analysis, 9, 17
Risk and Opportunity Analysis, 9
Risk Mitigation, 9
Risk Types, 281
Role Codes, 291, 385
Roles, 20
Assigning, 316
form, 288
Removing, 316
tab, 299
Rolling Wave, 6
Row Height Formatting, 100, 116
RPs, 5
Saving
Additional Project Information, 57
Baseline, 232
Scaling - Printing, 193
Schedule automatically when a change affects dates, 223
Schedule Comparison, 40, 200, 210, 279
Schedule form, 135, 244, 255
Schedule Options, 283, 413
Schedule Options form, 220, 224, 244
Schedule Updating, 250
Scheduling the Project, 135
S-Curves, 447
SDK, 425
Secondary Constraint, 150
Secondary Logic, 126
Section Content - Printing, 195
Security Profiles, 400, 405
Security Profiles form, 274
Select Code form, 376
Select Project form, 232
Select Subject Area, 390
Send Project, 44
Sequencing Logic, 12, 126
Set Default Project form, 283
Set Language, 284
Setting Baseline, 234
Setup Filters tab, 271
Shared, 28, 412, 417
Shared Resource Calendar, 63
Shift Calendar, 118
Shifts, 299
Show bar when collapsed, 109
Show Bars/Curves, 447
Show decimal digits, 266
Show Earned Value Curves, 447
Show full menus after a short delay, 34, 35, 45
Show Group Totals, 163
Show Icons, 116
Show Legend, 112
Show Relationships, 112
Shrink vertical grouping bands, 164
Sight Lines, 113
Single Filter Applying, 178
Slack, 13
Slack, Lean Task, 433
Soft Logic, 126
Software Developers Kit, 425
Sort Activities, 167
Sort form, 96, 167
Sort Order
Move Down, 167
Move Up, 167
Sorting Activities, 96
Specify the interval to summarize and store resource spreads, 278, 407, 409
Spell Check, 97
Spending Plan, 80
Stacked Histogram, 332, 410
Enterprise, 197
Move, 79
Print, 192
Project, 78, 321
Reports, 198
Reset All Toolbars, 34
Tools, 168, 251
Top Layout, 78, 142, 143, 172
Tools toolbar, 168, 251
Top Layout toolbar, 78, 142, 143, 172
Top-Down Budgeting, 20
Total Cost Management Framework, 5
Total Float, 14, 135, 145
Total Float less than or equal to, 226
Trace Logic, 144
Layout, 173
Options form, 173
Tracking Layout, 409
Tracking Progress, 18, 214, 244
Tracking Window, 81, 269, 409
TSLD, 200
Type
  Activity, 20, 63, 88
  Duration, 86
  Percent Complete, 86, 248
  Resource Rate, 51
Undo, 96
Unit Spread, 292
Units Format, 265
Units Percent Complete Type, 362
Units/Time Format, 266
Unopened Project, 116
unread Comments, 432
Unstaffed Remaining Units, 287
Update
  Activity, 250
  Baselines, 233
  Progress, 252, 253
  Schedules, 250
Updating, 214, 244
Updating a Complete activity, 250
Updating a Resourced Schedule, 356
Updating an activity that has not started, 251
Updating an In-progress activity, 250
Updating Expenses, 368
Updating the Schedule, 363
Use assigned calendar to specify the number of work hours for each time period, 70, 71, 276
Use Expected Finish Dates, 223
Use scheduling options for, 416
Use scheduling options from, 283, 401, 413
User Defined Fields, 379
User Defined Fields tab, 380, 451
User Password form, 269
User Preferences, 36
  Personal Information, 450
User Preferences form, 265, 308, 323
Users form, 273, 411
Utilities, Oil, and Gas, 40, 279
View
  Additional Activities View, 436
  Visualizer, 53, 200, 210, 376
  Visualizer Layouts, 460
VLF, 53
WBS, 6
  Activity, 312
  Add, 79
  Bands, 97
  Categories, 81, 281
  Copy, 79
  Delete, 79
  form, 95
  Merge, 79
  Milestones, 80, 441
  Name, 80
  Node, 80
  Node Separator, 80
  Options form, 79
  Organizing Activities, 77
  Project, 77
  Reordering, 97
  Window, 78
  Work Breakdown Structure, 11
Web Access Server URL, 278
Web Client, 22
Web Site, 199
Web Site Publisher, 191
Week of the Year, 118
What’s New, 42
What-if Project, 80, 116
When calculating earned value from a baseline use, 438
When scheduling progressed activities use, 134, 224

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Window
  Activities, 29
  Activity Network, 144
  Application Startup, 267
  Projects, 26
  Reports, 197
  Resource Assignments, 214
  Resources, 64, 285, 293
  Startup, 267
  Tracking, 81, 269
  WBS, 78
Windows Client, 22, 23
Wizards, 267
Work After Date, 354
Work Breakdown Structure, 6, 11
Work Package, 6
Work Products and Documents Window, 94
Working Hours, 68
WP's & Docs, 80
xer File Type, 427
xls File Type, 54
xml File Type, 53, 429
Zoom
  Printing, 192