

UNDERSTANDING WHY THE P6 UPDATE PROGRESS FUNCTION CHANGES ACTUAL DATES

INTRODUCTION

Most project scheduling software has a function titled "Update Progress", or similar name, and this function normally updates a program to the Data Date as it had been executed exactly as per the current plan. It updates data such as Actual Dates, Actual and Remaining Durations, Actual and Remaining Costs and Units and Percent Completes. This is the way that products like Microsoft Project, SureTrak and P3 operate.

The problem with both the Oracle Primavera P6 functions "Update Progress" and "Apply Actuals" is that both these functions may change Actual Dates that have been manually entered in the previous update and corrupt the schedule.

In normal circumstances I personally believe that schedules should be manually updated with the correct status and functions like "Update Progress" be avoided.

Some schedulers use the "Update Progress" function in the following situations, when:

- They are not able to obtain any accurate status data to update their program, or
- They use the "Update Progress Function" and then edit the data to suit the status data.

P6 DOES NOT calculate like any other software and I strongly recommend that you NEVER EVER use either of these function, unless you clearly understand the "Planned Dates", then you will probably not these functions use then anyway.

AIM

The aim of this paper is to explain why the P6 "Update Progress" function changes "Actual Dates" and offer suggestions to prevent this occurring.

UNDERSTANDING THE PLANNED DATES

P6 uses the "Planned Dates" to set Actual Start and Actual Finish dates with both "Update Progress" and "Apply Actuals" functions.

Often the "Planned Dates" hold irrelevant information and may be different to the Start and Finish dates of started activities then change the Actual Start date and Finish date of an in-progress activity to the "Planned Dates", thus corrupting your schedule.

There is a presentation on my website www.eh.com.au under "Technical Papers" titled "What Primavera P6 Baseline Bars am I Displaying?" that explains how the Planned Dates function in detail.

In summary the Planned Dates are calculated as follows:

- They match the Start and Finish Dates when an activity has not started, and
- When an activity is marked Started by setting an Actual Start the Planned Dates become unlinked from the Start and Finish and do not change unless manually changed.

The important point here is when an activity is marked as Started and then the Actual Start date is changed to a different date (which should be the date that it actually started on), then at that point in time the Planned Start and Finish could hold irrelevant information.

The Planned Dates will hold irrelevant data when a scheduler reschedules a program to the new Data Date when not all activities have been updated. At that point in time any activity marked as started will result in the Planned Dates holding irrelevant information because the Planned Dates will neither equal the date they were before they were updated or after they were updated.

The Apply Actuals function is used to bring in timesheet data, but users must be aware of the Planned Dates and how they function.



METHODS OF PREVENTING A CHANGE TO ACTUAL DATES

The best method to prevent a change to Actual Dates is not to use the "Update Progress" function and manually update a schedule.

Some people run a Global Change first before using the "Update Progress" function to set the Planned Dates to equal the Start and Finish dates. This process works but there are two issues with this process of using Global Change are:

- Firstly the Duration % Complete will then calculate differently, and
- Secondly you have to remember to run the Global Change otherwise you will corrupt your schedule!!!

PLANNED DATES DISCUSSION AND OTHER PLANNED DATES ISSUES

I prefer to ensure I never show or use the Planned Dates, which is the process I advocate in my training courses and it works. I would like to see the Planned Dates removed from P6 completely in my opinion that they only confuse users.

P6 also allows three values to be used as the Project Baseline values:

- The Current Schedule Budget
- The Baseline Budget, and
- The Baseline At Completion

I would also like to see the Budget fields removed as I believe the "Baseline At Completion" values should be used as "Budget" values and would remove a lot of confusion.

You also need to ensure you are not showing your Planned Dates from the Baseline as Baseline Dates; and by default the Planned Dates are always displayed as Baseline Date, often resulting in irrelevant data as Baseline Dates.

There are two places you need to understand to ensure you are not showing Planned Dates as Baseline Dates:

- Firstly the Project, Assign Baselines, <Current Project> will read the Planned Dates from the Current Project as Baseline Dates as no Baseline has been set, and
- Secondly the Admin, Admin Preferences, Earned Value, Earned Value Calculation option of "Budgeted values with planned dates" will read the Baseline Planned Dates as a Baseline again displaying irrelevant data as a Baseline.

In my opinion, when using an in-progress schedule as a Baseline, the Golden Rules with P6 are to ignore all fields with Planned, Budget, or <Current Project> (but not "Current Dates") and use the "At Completion values with current dates" Admin setting as a Baseline.

These issues are all covered in my books and training material, but not covered in other material I have seen.

Paul E Harris

BSc Hons, Certified Cost Engineer, PRINCE2 Practitioner
Managing Director and President
Eastwood Harris Pty Ltd, Australia

www.eh.com.au, www.eastwoodharris.com and www.primavera.com.au

Project Control Consultants and Planning and scheduling software book and training material publishers

4 April 2013

