

99 Tricks and Traps

for

Sample **Oracle Primavera P6**

PPM Professional

The Casual User's Survival Guide **Updated for Version 23**

Paul E Harris

of

to chapters **Eastwood Harris Pty Ltd**

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8 FORMATTING

The formatting of all P6 windows is very similar. Thus, Grouping and Sorting projects in the Project window is very similar to Grouping and Sorting activities in the Activities window.

8.1 Activity Window Bar Formatting

There are many issues with all the formatting of the bars in all of the Oracle Primavera P6 Activity Layouts supplied with the software. Also **NEVER** select **Default** in the **Bars** form as this will apply some bad bar formatting to your layout.

The author has placed a layout on www.primavera.com.au and www.eh.com.au under Technical Papers, titled www.primavera.com.au_layout that has fixed the bar formatting issues discussed below.

It is suggested that downloading this layout will save users a significant amount of formatting on their existing layouts.

The bar formatting from this Layout may be copied to any other Layout in the **Bars** form, **Copy from...** function.

The issues that are prevalent in some or all of the Oracle Primavera Layouts are:

- There is Total Float displayed on complete activities,
- Relationships are displayed on the Baseline Bars,
- The Baseline bar formatting for all Baseline bars are all the same size, color and in the same position, thus it is difficult to see which baseline is being displayed,
- Three Baseline Milestones will not be displayed,
- Bar Text is assigned to a number of bars. Bar text should be assigned to a blank bar, so it may be simply hidden or displayed.
- LOE bars are not displayed, so they are hidden when created.

The full explanation of the issues and fixes made in the **www.primavera.com.au_layout** are documented in the authors other P6 books.

You have several choices for sorting out the bar formatting:

- Delete the Oracle Layouts and use the www.primavera.com.au_layout as a basis for all your layouts, or
- Copy the www.primavera.com.au_layout bar formatting to all other Layouts including the Oracle Layouts, using the Bars form Copy From.. function or
- Edit the layouts you are using.

8.2 Creating a Summary Bar

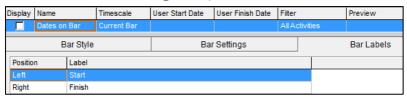
It is not obvious how to create a Summary bar:

- When creating a new Summary bar, you will not be able to 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:



8.3 Adding a Bar Label

If you wish to add a label, then it is best to create a bar that does not display the bar and only has a Label. This may be displayed against all activities and be easily displayed or hidden and saves editing multiple bars:



8.4 Baseline Bar Disappearing when an Activity is made an LOE

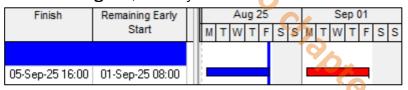
Often, after a Baseline has been set, there is a requirement to add more detail to a baselined activity but retain a view of the original Baseline bar. This may be achieved by converting the original Activity to an LOE and adding the detailed activities below the LOE and linking the new activities to the new LOE activity. If the original Baseline activity disappears, then you need to open the bars form and set the filter to **All Activities** and the Baseline bar will be displayed:

Bars	10/					
Display		Name	Timescale	User Start Date	Filter	Preview
	Project Bas	seline Bar	Project Baseline Bar		All Activities	
	Project Ba	seline MS	Project Baseline Bar		Milestone	▽

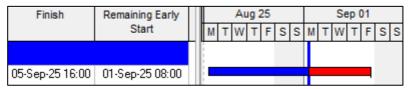
8.5 Why is there a gap in my Bar on the Data Date

When an activity is in-progress the activity **Remaining Early Start** is set to the activity calendar Start Date & time,

When the **Data Date** is set to Friday 17:00 there will be a gap between the **Data Date** line and the start of the **Remaining Bar**, Monday 08:00:



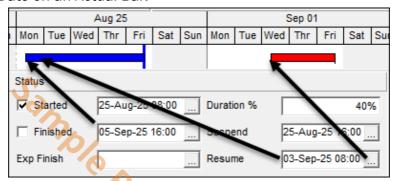
To prevent this set the **Data Date** to the Activity Calendar Start Date and Time, i.e. the **Remaining Early Start** date and time:



NOTE: Microsoft Project normally defaults the **Status Date** to the end of a day, not the start.

8.6 No splits seen in an activity Actual bar with a Suspend and Resume

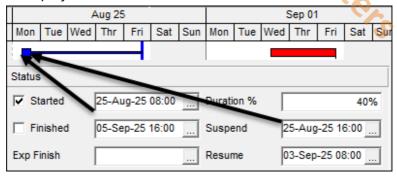
Oracle Activity Layouts do not neck and display a Suspend Date on an Actual Bar:



❖ To display the Suspend date on the bar you need to open the Bars form and select the Actual Work bar and check the Bar Necking Settings, Activity nonwork intervals:



The result be as per below and the Suspend date displayed:



8.7 Displaying Free Float Bar

By default, P6 PPM will not display the **Free Float** bar and nor will **Visualizer**. If it is important to display it, there is an option using **UDF fields** and a **Global Change**:

Create a UDF Free Float Start, Free Float Finish and Free Float Value:

Title	∇ Data Type
Free Float Finish	Finish Date
Free Float Start	Start Date
Free Float Value	Number

Populate them with a Global Change, the division by 8 changes hours to days. When different calendars are used, say 10 hour or several calendars, then you will need to revise the Global Change:

Then	Parameter	ls	Parameter/Value	Operator	Parameter/Value
	Free Float Start	4	Remaining Early Finish		
And	Free Float Value		Free Float	1	8.00
And	Free Float Finish	=	Remaining Early Finish	+	Free Float Value

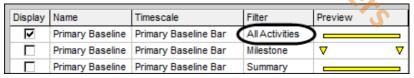
Then create a User Bar between the dates:

Display	Name	Timescale	User Start Date	User Finish Date	Filter
✓	Free Float	User Dates	Free Float Start	Free Float Finish	Not Started and In Progress

NOTE: It is important to set the filter as in the picture above, so a Total Float Bar is not displayed on completed activities.

8.8 Displaying All Baseline Bars

The Oracle Primavera **Bars** form, **Default** option does not show either LOE or Summary bars, to show these bars you must format you bars as follows in the **Bars** form:



8.9 Displaying a Baseline Critical Path Bar

P6 by default does not display a **Baseline Critical** bar, but once you have set a Baseline you will find there are many more fields available in the columns form, including the **BL Total Float**, which may be used to draw a **Baseline Critical** bar.

To draw a **Baseline Critical** bar:

Create but do not apply a Baseline Critical Filter, this will be used later:

Di	splay all rows	Parameter	ls	Value	High Value
		(All of the following)			
	Where	BL Project Total Float	equals	0d	

Create a Baseline Critical bar as per the picture below. It should be in the same position, which is set in the Bar Style tab, but below it in the Bars form, so it will be drawn over the top:

Display	Name	Timescale	User S	User F	Filter	Preview
ᅜ	Project Baseline Bar	Project Baseline Bar			All Activities	
✓	Baseline Critical	Project Baseline Bar			Baseline Critical	

The Baseline Critical bar will be drawn over the Baseline bar:



❖ NOTE: If you make the filter and layout Global, then any user may use the layout to display the Baseline Critical bar.

8.10 Formatting Columns

Column formatting is simple and may be completed by:

- Dragging columns to a new position and adjusting the width by dragging, or
- Opening the Columns form which is self-explanatory.
- It is often better to edit the column name so you may create narrower columns and still read the column name. For example, I always rename Original Duration to Orig Dur,
- NOTE: You will find that some columns, like the Calendar column may not be left formatted, only center or right.



8.11 Row Height and Show Icon

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 height of a single row may be manually adjusted in a similar way to adjusting row heights in Excel, just grab the lower line of a cell and drag.

8.12 Moving and Rescaling the Timescale with the Mouse

Most formatting of the timescale may be completed with the mouse:

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.

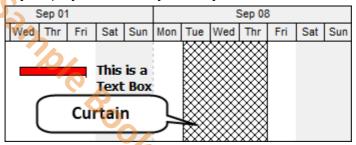


- ❖ The timescale may be rescaled, therefore increasing or decreasing the length of the bars and displaying more or less of the schedule, by placing the cursor in the bottom half of the Timescale. The cursor will turn into a ☐; click, hold and drag left to make the bars shorter and right to make the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

8.13 Inserting Attachments – Text Boxes and Curtain

Text Boxes and **Curtains** may be added to the Gantt Chart by right clicking in the Gantt Chart and selecting the required command.

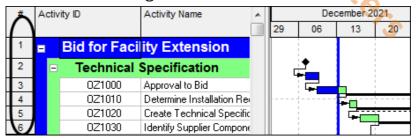
- **❖ A Text Box** will be attached and move with the activity.
- Curtains are useful for highlighting holidays etc. and are only displayed in the Layout they are created in:



8.14 Line Numbers

Version 8.2 introduced a Microsoft Project style **Line Numbers**.

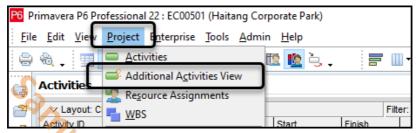
- Select View, Line Number to display or hide the Line Number.
- This is a very useful feature for reviewing a schedule to ensure that everyone in a meeting is looking at the same activity.
- But, as in Microsoft Project, this is an order and the number will change if the schedule is reordered.



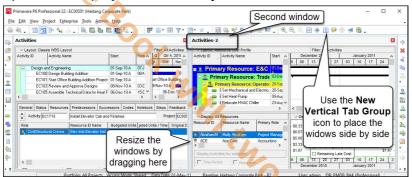


8.15 Multiple Project Views Displayed Side by Side

P6 Version 22 added an additional option in the **Project** menu titled **Additional Activities View**:



This option will open a second view of the project(s) that are opened. The projects views may then be resized etc.:

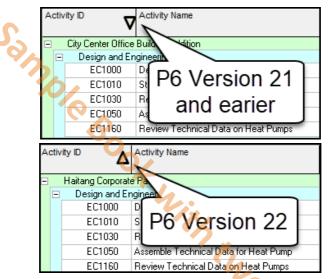


The Oracle description was not clear to me, but I found by experiment that:

- Each window may be formatted separately
- Each window may be printed separately by clicking in the window that is required to be printed.
- The Schedule Options and Schedule Check Report options may not be different for each view and scheduling one view will schedule both views.

8.16 Colum Header Sort Arrow Direction Reversed

Although not listed as an enhancement in the Oracle documentation, the arrow in a column header has been reversed in P6 Version 22 and now when it points up the column is sorted alphabetically down, as in the EPPM Web tool:



This change operates in all windows and on all data items.

13 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. Unfortunately, the **Highlight** function does allow the normal functions of printing the highlighted activities, reversing highlighting or hiding highlighted activities.

13.2 Filter Types

There are four types of filters:

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

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, 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 which the absence of often results in a proliferation of Global filters to allow all users of a project to access the filters designed for a specific project. This creates an ongoing maintenance task for the database administrator, removing old filters after the project is complete.

NOTE: It is recommended that in large databases a coding system is set up for Global filters when users are allowed to create them or make users use Layout filters.

13.3 Applying a Filter

Filters are applied from the **Filters** form andbe 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 in the **Filter** form is not checked then there is a filter applied.

13.4 Creating a New Filter

Filters may be created from the **Filters** form and are fairly self-explanatory.

To see how filters are constructed you may either:

- Copy an existing Global filters and open,
- Look at other filters, if they exist, or
- Buy one of my other P6 books.

13.5 Creating Resource Filters

When filtering on resources, the filter must use the option of **contains** in the **Is** column and not **equals**. An activity will not be selected with a filter using the **equals** it has been assigned more than one resource.

13.6 WBS Filters

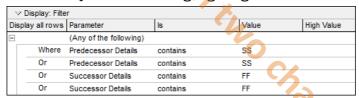
Filters created for a WBS Code will only work on the project they are created in because the WBS Code includes the Project ID.

NOTE: If your project uses WBS filters, then you should not change the Project ID of your Current or Work In-progress project. When you copy your project, then the copies should be assigned a new Project ID and the project you are working on should always have the same Project ID.

13.7 Some Useful Ideas for Filters

Here are some things you can do with filters:

Find SS and FF relationships by using the Predecessor and Successor contain SS or FF. This is useful when used in conjunction with highlighting.



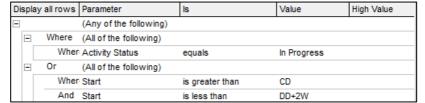
❖ Isolate activities with a specific resource by using the Resource Name plus contains. If you use Resource Name plus equals, you will not see any activity that has more than one resource assigned.

Di	splay all rows	Parameter	ls	Value	High Value
		(All of the following)			
	Where	Resource IDs	contains	PM	

When an activity name contains a word, the text that is entered is not text sensitive, so the filter below will isolate activities with Bid or bid in the name:

Display all rows Parameter		Is	Value	High Value
⊟	(All of the following)			
Where	Activity Name	contains	bid	

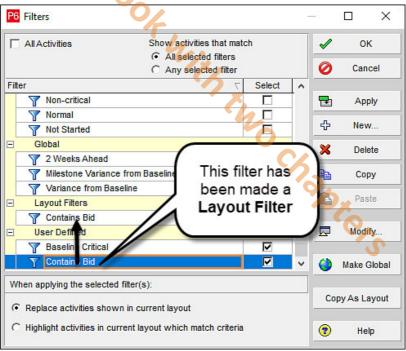
Creating a look-ahead filter, filtering on the following parameters:



NOTE: The **Look-ahead** filter in the Oracle sample database does not work.

13.8 Exporting Filters

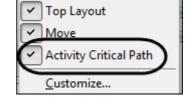
Filters may not be exported on their own, but if you wish to export a filter, then it may be made a **Layout** filter by using the **Copy As Layout** command in the **Filters** form and then have the Layout exported:



13.9 Activity Critical Path Visibility Toolbar

There is a new function and toolbar in Version 21 titled **Activity Critical Path**.

The 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 View, Activity Critical Path.
- IMPORTANT NOTE: Clicking on a button will activate the command and clicking again will deactivate the command.

Activity Critical Path

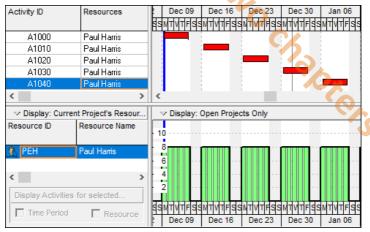
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We will work through the icons one at a time and explain how the functions work.

13.9.1 Backward Resource Driven Critical Path



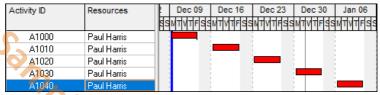
The schedule below has no relationships between activities and has been levelled.



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

Activity ID	Resources			Dec 09	Dec 16		Dec 23		Dec 30	Jan 06
		3	S	MTVTFSS	MTVTFS	S	NTVTFSS	МТ	VTFSS	MTVTFSS
A1040	Paul Harris									

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



NOTE: Review the **Backward Activity Critical Path** now and then come back and review this one.

13.9.2 Enable Group and Sort

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:

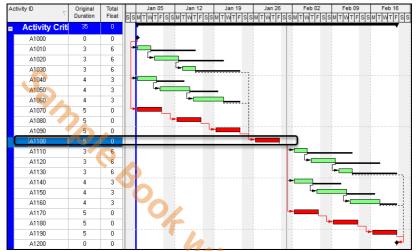


Group and Sort disabled:

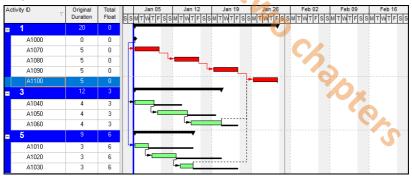
Activity ID	Activity Name		2012			2013				2014			V
,		ΙГ	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
EC2140	Shell Complete			. 🖫									
EC2260	Entry Feature/Sign Wall	l		**								-	
EC2430	Substantial Completion - All TCO												
EC2440	Complete Building 1	l											

13.9.3 Backward Activity Critical Path

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:



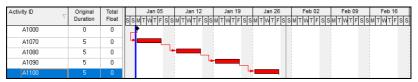
Users should also consider using the **Activity Critical Path** function in conjunction with the **Float Path Order** function to provide a clear view of the **Float Paths**:



The **Backward Critical Path** 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 lease 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.



13.9.4 Forward Activity 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.

Activity ID	Original	Total		Jan 05	Jan 12	Jan 19	Jan 26	Feb 02	Feb 09	Feb 16
\	Duration	Float	SS	MTWTFSS	MTWTFSS	MTWTFSS	MTWTFSS	MTWTFSS	MTWTFSS	MTWTFSS
A1100	5	0			9	5				
A1170	5	0					4			
A1180	5	0						L _p .		
A1190	5	0							L,	
A1200	0	0								**

13.9.5 Activity Critical Path

This option displays the chain of events before and after a selected activity that has the least amount of Float, as per the parameters above.

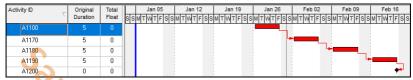
Thus, the picture below shows both the **Forward Activity Critical Path** and **Backward Activity Critical Path** from Activity A1100.

Activity ID	Original Duration	Total Float	SS	Jan 05	Jan 12	Jan 19 M T W T F S S	Jan 26	Feb 02	Feb 09	Feb 16
A1000	0	0	F							
A1070	5	0	4							
A1080	5	0		با						
A1090	5	0			L _p					
A1100	5	0				L _a				
A1170	5	0								
A1180	5	0						L.		
A1190	5	0							L _a	
A1200	0	0								لمه

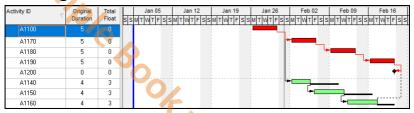
13.9.6 Maximum Critical Path Count

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:



Selecting two as Maximum Critical Path Count:



Selecting three as Maximum Critical Path Count:



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

13.9.7 Increase Maximum Multiple Critical Path



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

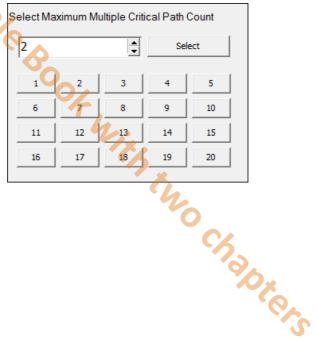
13.9.8 Decrease Maximum Multiple Critical Path Counts



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

13.9.9 Select Maximum Multiple Critical Path Counts

This opens a form allowing the setting of the Maximum Multiple Critical Path Counts:



29 Useful Websites

There are many web sites available with lots of great information. I have listed below some that you may wish to visit:

- https://www.eh.com.au my web site for all my books and courses including P6, Microsoft Project and Elecosoft (Asta) Powerproject.
- https://www.primavera.com.au my web site for all my books and courses focusing on P6. This has a page with a list of third-party software that works with P6.
- http://www.planningplanet.com the Planning Planet is a site that links networking planning, scheduling, program& project control professionals around the world.
- https://www.oracle.com/industries/constructionengineering/ This page is the main portal for information on Oracle Primavera Construction software.
- https://edelivery.oracle.com the Oracle E-Delivery web site where you may download any Oracle product that is currently available to license.
- https://shop.oracle.com The Oracle Store is where you may purchase Oracle software online. You should be able to buy P6 software at a lower price by negotiating with an Oracle Partner.
- https://support.oracle.com The Oracle Support page is the main portal for support for Oracle software. You will need to create an account to log into the system and view the support database. This is a link to a site that is an Oracle Primavera site.
- https://www.oracle.com/communities/ The Oracle Community site is an Oracle site and includes several links to other Oracle sites such as Blogs, Forums, Wiki, User Groups Support etc.
- https://tensix.com/ The Tensix Consulting web site has hundreds of great blogs.



- https://www.planacademy.com/blog/ The Plan Academy's blog has some great articles.
- https://ronwinterconsulting.com/ Ron Winter has published many articles on P6 and has a wealth of knowledge on the ins and outs of P6.
- https://docs.oracle.com/en/ The Oracle Technology web site which has the documentation for Primavera P6 software.
- https://projectcontrolsonline.com/ The Project Controls Online.com web site has many P6 blogs.
- https://www.planacademy.com/ The Plan Academy, an online training company, produces and delivers online, on-demand training on Project Controls. It also has several good blogs.

If you know of any other website with useful information, please let me know and I will add them to my next publication.



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