

99 Tricks and Traps**for****Oracle Primavera P6****PPM Professional**

The Casual User's "Survival Guide"
Updated for Version 21

By**Paul E Harris****of****Eastwood Harris Pty Ltd**

©Copyright 2022 by Eastwood Harris Pty Ltd. No part of this publication may be reproduced or used in any form or by any method without the written permission of the author.

Oracle and Primavera are registered trademarks of Oracle and/or its affiliates.

Windows, Microsoft® Project 365, Microsoft® Project Standard 2021, Microsoft® Project Professional 2021, Microsoft® Office Project Standard 2019, Microsoft® Office Project Professional 2019, Microsoft® Office Project Standard 2016, Microsoft® Office Project Professional 2016, Microsoft® Office Project Standard 2013, Microsoft® Office Project Professional 2013 Windows and Excel are registered trademarks of Microsoft Corporation.

Elecsoft Powerproject is a registered trademark of Elecsoft®.

Adobe® and Acrobat® are registered trademarks of Adobe Systems Incorporated.

All other company or product names may be trademarks of their respective owners.

Screen captures reprinted with authorization from Oracle Corporation.

This publication was created by Eastwood Harris Pty Ltd and is not a product of Oracle Corporation.

DISCLAIMER

The information contained in this publication is to the best of the author's knowledge true and correct. The author has made every effort to ensure accuracy of this publication but may not be held responsible for any loss or damage arising from any information in this publication. Furthermore, Oracle Corporation reserves the right in their documentation to make changes to any products to improve reliability, function, or design. Thus, the application of Service Packs or the use of upgraded software may result in the software operating differently from the descriptions in this publication.

AUTHOR AND PUBLISHER

Paul E Harris
Eastwood Harris Pty Ltd
PO Box 4032
Doncaster Heights, 3109
Victoria, Australia

e-mail: harrispe@eh.com.au
Web: <http://www.eh.com.au>
Tel: +61 (0) 4 1118 7701

Please send any comments on this publication to the author.

ISBN 978-1-925185-90-4 - paperback

ISBN 978-1-925185-91-1 - eBook

3 June 2022

CURRENT BOOKS PUBLISHED BY EASTWOOD HARRIS

Planning and Control Using Oracle Primavera P6 Versions 8 to 21 PPM Professional

Oracle Primavera P6 Version 16 EPPM Web Administrators Guide

Planning and Control Using Oracle Primavera P6 Versions 16 EPPM Web

Create and Update an Unresourced Project Using Elecosoft (Asta) Powerproject Version 16

Planning and Control Using Microsoft Project 2013, 2016 and 2019

Planning and Control Using Microsoft Project 365 - Including Microsoft Project 2010, 2013, 2016 and 2019

99 Tricks and Traps for Microsoft® Project 2013, 2016 and 2019

Planning and Control Using Microsoft® Project 2013, 2016 and 2019 and PMBOK® Guide Sixth Edition

规划和控制Oracle Primavera P6 应用 版本 8.1-15.1 PPM 专业版

Sample book with two chapters

SERVICES OFFERED BY EASTWOOD HARRIS PTY LTD

Eastwood Harris specializes in setting up and running project controls systems with a focus on Primavera Systems and Microsoft Project software; we offer the following services:

Project Planning and Scheduling Training Courses using Oracle Primavera P6, Asta Powerproject and Microsoft Office Project:

- Eastwood Harris offers one-to-one training to get your new schedulers up and running quickly, without the delay of waiting for the next course and at the same time building up your own project schedule.
- We also run in-house training courses on any of these software packages. This is a very cost-efficient method of training your personnel.
- We are able to assist you in setting up a scheduling environment. This includes designing coding structures, writing procedures, training and other implementation processes.
- Eastwood Harris can write specialized training material that will incorporate your organization's methodology into the Eastwood Harris training manuals and develop student workshops tailored to your requirements. Project personnel will be able to use these books as reference books after the course.

Selection and Implementation of Project Management Systems

- Eastwood Harris will assist you by conducting an internal review of your requirements and match this requirement analysis against the functionality of packaged software.
- We are then able to assist you in the implementation of these systems, including writing policies and procedures and training personnel, to ensure a smooth transition to your new system.

Dispute Resolution

- Eastwood Harris is able to analyze your subcontractor's schedules in the event of claims and provide you with a clear picture of the schedule in relation to the claim.

Schedule Conversion

- Eastwood Harris is able to convert your schedules from one software package to another. The conversion of schedules is often time consuming, so let us do it for you.

Please contact the author for more information on these services.

TABLE OF CONTENTS

1	INTRODUCTION	1
1.1	Background Knowledge required to use this book.....	1
1.2	P6 Versions	1
1.3	Aim of this book	1
1.4	Information Sources	1
1.5	Important Points	2
2	GETTING THE ENVIRONMENT RIGHT – SETTING DATABASE	
OPTIONS	4	
2.1	Understanding Databases.....	4
2.2	Understanding Database Options.....	5
2.3	General.....	5
2.3.1	Start Day of Week	6
2.3.2	Default Duration	6
2.4	Time Periods, Hours per Time Period	6
2.5	Earned Value, Earned Value Calculation.....	7
2.6	Options	8
2.6.1	Specify the intervals to summarize and store resource spreads	8
2.6.2	Options Removed from the Options tab.....	9
2.6.3	Professional Online Help URL	9
2.6.4	Document Security	9
2.6.5	Cost Spread.....	10
2.7	Admin, Rate Types, Resource and Role Rate Types	10
2.8	Admin, Preferences, Industry	11
2.9	Admin, Consent Notice	13
2.10	Admin, Status of User Acceptance	13
2.11	Exception Site List	14
2.12	Admin, Categories.....	14
2.12.1	Notebook Topics	14
2.12.2	Units of Measurement.....	15
2.13	Admin, Currencies.....	15
2.14	Admin, Financial Period Calendars	16
2.15	Date and Time Display	17
2.16	Units Display	17
2.17	Printouts and Reports Header and Footers	17
2.18	Users, Security Profiles and Organizational Breakdown Structure.....	18
2.19	Project Codes	19
2.20	Summarizing Projects.....	20
2.21	Job Services	21

3 SETTING UP USER PREFERENCES AND OTHER

USER SETTINGS.....	22
3.1 Creating Users	22
3.2 User Preferences.....	22
3.2.1 <i>Time Unit Formatting</i>	23
3.2.2 <i>Date Formatting</i>	24
3.2.3 <i>Users may See and Set Activity Start and Finish Times in the Date Picker box.</i>	25
3.2.4 <i>Currency</i>	26
3.2.5 <i>Email</i>	26
3.2.6 <i>Assistance - Stopping Wizards Running</i>	26
3.2.7 <i>Application</i>	27
3.2.8 <i>Password</i>	28
3.2.9 <i>Resource Analysis</i>	28
3.2.10 <i>Calculations</i>	30
3.2.11 <i>Startup Filters</i>	31
3.2.12 <i>Personal Identifiable Information Tab</i>	32
3.3 Default Toolbar Issues	33
3.4 Set Language	34
3.5 Portfolios.....	34
3.5.1 <i>Difference between User Baselines and Project Baselines</i>	34
3.6 Who has been messing with my project?	34
3.7 Closing Down.....	35

4 CREATING A NEW PROJECT.....

4.1 New Project Wizard	36
4.1.1 <i>Date and Time</i>	36
4.1.2 <i>Close all other projects</i>	36
4.1.3 <i>EPS Node</i>	36
4.1.4 <i>Project ID</i>	36
4.1.5 <i>Project Must Finish By Date</i>	37
4.2 Other Methods of Creating a Project.....	37
4.3 Setting Project Defaults and Other Data in the Projects Window Details Pane.....	38
4.3.1 <i>General Tab, Status</i>	38
4.3.2 <i>Dates Tab, Scheduled Dates</i>	38
4.3.3 <i>Dates Tab, Anticipated Dates</i>	39
4.3.4 <i>Defaults Tab, Defaults for New Activities</i>	40
4.3.5 <i>Calculations tab, Activities</i>	42
4.3.6 <i>Calculations tab, Resources Assignments</i>	42
4.3.7 <i>Codes tab</i>	42
4.3.8 <i>Notebook tab</i>	42
4.3.9 <i>Resources tab</i>	42
4.3.10 <i>Settings tab</i>	43
4.4 Tools, Schedule Options	44
4.5 Author's recommended new project setup	46

5 CALENDAR ISSUES.....	48
5.1 Non-Work time display.....	48
5.2 Copying Project Calendars	49
5.3 Inherit Holidays and Exceptions from a Global Calendar... ..	49
5.4 Calendars for Calculating Project, WBS and Other Summary Durations.....	49
5.5 Resource Dependent Activity Start Date and Time	50
5.6 Project or Global calendars.....	51
5.7 Elapsed Duration Activities	51
5.8 Tips for Mixed Calendar Schedules	52
6 CREATING A WBS	54
6.1 Merge or Delete a WBS Node	54
6.2 WBS Node Separator.....	54
6.3 WBS Categories	55
6.4 Why is the WBS not displayed correctly?	56
6.5 Why can't see the WBS in the Activities Window?	56
7 ADDING ACTIVITIES	57
7.1 New Activity Defaults	57
7.2 Duration Type.....	57
7.3 Percent Complete Type	59
7.4 Cost Account	59
7.5 Calendar	60
7.6 Copying Activities from other Programs	60
7.7 Copying Activities in P6	60
7.8 Renumbering Activity IDs	60
7.9 Finding the Bars in the Gantt Chart.....	61
7.10 Assigning Calendars to Activities	61
7.11 Assigning Activities to a WBS Node	61
7.12 Adding Splits to an Activity	62
7.13 Reordering or Sorting Activities.....	63
7.14 Undo	63
7.15 Spell Check	63
7.16 Updating Parameters in a Large Number or All Activities ..	63
8 FORMATTING.....	64
8.1 Activity Window Bar Formatting	64
8.2 Creating a Summary Bar	65
8.3 Adding a Bar Label.....	65
8.4 Baseline Bar Disappearing when a Activity is made an LOE	66
8.5 Why is there a gap in my Bar on the Data Date	66
8.6 No splits seen in an activity Actual bar with a Suspend and Resume	67
8.7 Displaying Free Float Bar	68
8.8 Displaying All Baseline Bars.....	68
8.9 Displaying a Baseline Critical Path Bar	68

8.10	Formatting Columns.....	69
8.11	Row Height and Show Icon	70
8.12	Moving and Rescaling the Timescale with the Mouse.....	70
8.13	Inserting Attachments – Text Boxes and Curtain.....	71
8.14	Line Numbers	71
9	ADDING RELATIONSHIPS	72
9.1	Adding relationships	72
9.2	Relationship Colors	72
9.3	Hiding relationships	73
9.4	Circular Relationships.....	73
9.5	Removing Relationships from Selected Activities	74
9.6	Dissolving Activities and Retain Lag	75
9.7	Reviewing Relationships, Leads and lags.....	76
9.8	Ladder Scheduling	76
9.9	Relationship Comments	77
10	ACTIVITY NETWORK VIEW	78
10.1	Viewing Relationships in Selected WBS Nodes.....	78
10.2	Viewing a Project Using the Activity Network View	78
10.3	Formatting the Activity Boxes	79
10.4	Reorganizing the Activity Network.....	79
10.5	Saving and Opening Activity Network Positions	80
10.6	View Trace Logic.....	80
11	CONSTRAINTS	81
11.1	Assigning Constraints	81
11.2	Number of Constraints per Activity	81
11.3	As Late As Possible Constraint.....	81
11.4	Expected Finish Constraint.....	82
11.5	Constraint Identification	82
11.6	External Dates.....	82
11.7	Mandatory Constraints	83
11.8	Activity Notebook.....	83
12	GROUP, SORT AND LAYOUTS	84
12.1	Activity Groups and Sort form.....	84
12.2	Sorting.....	88
12.3	Group and Sort Projects at Enterprise Level	88
12.4	Understanding Layouts.....	88
12.5	Copying Layouts from one database to another	89
12.6	Removing/Reordering Bottom Pane tabs.....	89
12.7	Disable Auto-Reorganization Shft+F12	89
13	FILTERS	90
13.1	Understanding Filters.....	90
13.2	Filter Types	90
13.3	Applying a Filter.....	91
13.4	Creating a New Filter.....	91
13.5	Understanding Resource Filters.....	91

13.6	WBS Filters.....	92
13.7	Some Useful Ideas for Filters.....	92
13.8	Exporting Filters	93
13.9	Activity Critical Path Visibility Toolbar	94
13.9.1	<i>Backward Resource Driven Critical Path.</i>	94
13.9.2	<i>Increase Maximum Multiple Critical Path Counts.</i>	95
13.9.3	<i>Maximum Critical Path Count</i>	95
13.9.4	<i>Decrease Maximum Multiple Critical Path Counts</i>	96
13.9.5	<i>Select Maximum Multiple Critical Path Counts.....</i>	96
13.9.6	<i>Enable Group and Sort</i>	96
13.9.7	<i>Backward Activity Critical Path</i>	97
13.9.8	<i>Forward Activity Critical Path</i>	97
13.9.9	<i>Activity Critical Path</i>	98
14	PRINTING AND REPORTS.....	99
14.1	Output Options	99
14.2	Management Considerations.....	100
14.3	Printing	101
14.4	Not able to type a "S" in the Header or Footer	104
14.5	Running Reports	104
14.6	Editing reports.....	104
14.7	Publish to a Web Site.....	105
14.8	Understanding Visualizer	105
15	UNDERSTANDING P6 DATE FIELDS.....	106
15.1	Early Start and Early Finish	107
15.2	Late Start and Late Finish	108
15.3	Actual Start and Actual Finish.....	108
15.4	Planned Dates Calculations	109
15.5	Planned Dates Issues.....	110
15.6	How to use Update Progress on an In Progress Schedule.....	112
15.7	Remaining Early Start and Finish.....	113
15.8	Remaining Late Start and Finish	113
16	SCHEDULING OPTIONS.....	114
16.1	Setting the Schedule Options	114
16.2	Ignore relationships to and from other projects	116
16.3	Make open-ended activities critical.....	116
16.4	Use Expected Finish Dates.....	117
16.5	Schedule automatically when a change affects dates	118
16.6	Level resources during scheduling	118
16.7	Recalculate resource costs after scheduling.....	118
16.8	When scheduling progressed activities use	118
16.9	Calculate start-to-start lag from	120
16.10	Define critical activities as	120
16.11	Calculate float based on finish date of.....	121
16.12	Compute Total Float as	122
16.13	Calendar for scheduling Relationship Lag	123

17 SETTING THE BASELINE.....	124
17.1 Typical Baseline types.....	124
17.2 Number of Baseline Allowed	124
17.3 Setting a Baseline	124
17.4 Displaying Baseline Data.....	125
17.5 Difference between the Project Baseline and a User Baseline	125
17.6 Limitation on Viewing Baseline Data	125
17.7 Understanding the <Current Project> in the Assign Baseline form	126
18 UPDATING AN UNRESOURCED SCHEDULE.....	127
18.1 Updating Process	127
18.2 Calculation of Durations of an In progress Activity	128
18.3 Default Percent Complete	129
18.4 Activity % Complete	130
18.5 Understanding the Current Data Date	131
18.6 Updating the Schedule	131
18.6.1 <i>Updating Activities Using the Status Tab of the Details Form</i>	<i>131</i>
18.6.2 <i>Updating Activities using Columns.....</i>	<i>133</i>
18.7 Progress Spotlight and Update Progress	133
18.7.1 <i>Progress Spotlight</i>	<i>133</i>
18.7.2 <i>Update Progress.....</i>	<i>134</i>
18.8 Suspend and Resume	135
18.9 Scheduling the Project.....	136
18.10 Comparing Progress with Baseline	137
18.11 Progress Line Display on the Gantt Chart.....	138
18.12 Comparing Schedules.....	139
19 CREATING ROLES AND RESOURCES	140
19.1 Understanding Roles and Resources.....	140
19.2 Creating Roles	141
19.3 Creating Resources.....	143
19.3.1 <i>Resources Window.....</i>	<i>143</i>
19.3.2 <i>Adding Resources</i>	<i>144</i>
19.3.3 <i>General Tab</i>	<i>144</i>
19.3.4 <i>Codes Tab</i>	<i>144</i>
19.3.5 <i>Details Tab</i>	<i>145</i>
19.3.6 <i>Units and Prices Tab</i>	<i>149</i>
19.3.7 <i>Roles Tab</i>	<i>150</i>
19.3.8 <i>Notes Tab</i>	<i>150</i>
19.3.9 <i>Progress Reporter Tab</i>	<i>150</i>
19.3.10 <i>Role Rate Vary Over Time – P6 Version 20 Enhancement</i>	<i>151</i>
19.3.11 <i>Resource and Role Cost Spread Consider Rate Changes Over Time</i>	<i>152</i>

20 ASSIGNING ROLES, RESOURCES AND EXPENSES.....	154
20.1 Understanding Roles, Resources and Expenses	154
20.2 Understanding Resource Calculations and Terminology..	155
20.3 Project Window Resource Preferences	157
20.3.1 Resources Tab	157
20.3.2 Understanding Resource Option to Drive Activity Dates	158
20.3.3 Calculations Tab	159
20.3.4 User Preferences Applicable to Assigning Resources...	159
20.3.5 Assignment Staffing	160
20.4 Activities Window Resource Preferences and Defaults....	161
20.4.1 Details Status Form	161
20.4.2 Activity Type.....	162
20.4.3 Duration Type.....	165
20.5 Assigning and Removing Roles.....	167
20.6 Assigning and Removing Resources.....	168
20.6.1 Assigning a Resource to an Assigned Role.....	168
20.6.2 Assigning a Resource to an Activity Without a Role	170
20.6.3 Removing a Resource	171
20.6.4 Assigning a Resource to an Activity More Than Once ...	173
20.7 Resource and Activity Duration Calculation and Resource Lags	173
20.7.1 Activity Duration.....	173
20.7.2 Resource Lag	174
20.8 Expenses	174
20.8.1 Expenses Window.....	174
20.8.2 Expenses Tab in the Activities Window	175
20.9 Suggested Setup for Creating a Resourced Schedule	175
21 RESOURCE OPTIMIZATION.....	178
21.1 Reviewing Resource Loading	178
21.1.1 Activity Usage Spreadsheet.....	178
21.1.2 Activity Usage Profile	180
21.1.3 Resource Usage Spreadsheet	181
21.1.4 Editing the Resource Usage Spreadsheet – Bucket Planning.....	182
21.1.5 Resource Usage Profile displaying a Resource Histogram.....	183
21.1.6 Histogram Bars Exact Values – P6 Version 20 Enhancement.....	184
21.1.7 Stacked Histogram	185
21.1.8 Activity Usage Profile Displaying S-Curves	186
21.2 Resource Assignments Window.....	187
21.3 Copying and Pasting into Excel	188
21.4 Other Tools for Histograms and Tables	188
21.5 Methods of Resolving Resource Peaks and Conflicts	189
21.6 Resource Leveling	190
21.6.1 Methods of Resource Leveling	190

21.6.2 Resource Leveling Function	192
21.6.3 Level Resources Form	192
21.7 Guidelines for Leveling	194
21.8 What to look for if Resources are Not Leveling	196
21.9 Resource Curves	197
22 UPDATING A RESOURCED SCHEDULE	199
22.1 Understanding Budget Values and Baseline Projects	200
22.1.1 Cost and Units Budget Values	200
22.1.2 Baseline Project and Values	201
22.2 Understanding the Current Data Date	201
22.3 Information Required to Update a Resourced Schedule	202
22.4 Activities Window – Percent Complete Types	204
22.5 Using Steps to Calculate Activity Percent Complete	204
22.6 Updating the Schedule	206
22.6.1 Recommended Preferences, Defaults and Options for Updating a Project	206
22.6.2 Updating Dates and Percentage Complete	210
22.7 Updating Resources	210
22.8 Updating Expenses	211
23 OTHER METHODS OF ORGANIZING PROJECT DATA	213
23.1 Activity Codes	213
23.1.1 Understanding Activity Codes	214
23.1.2 Activity Code Creation	214
23.1.3 Defining Activity Code Values and Descriptions	215
23.1.4 Assigning Activity Code Values to Activities	216
23.1.5 Grouping, Sorting and Filtering with Activity Codes	217
23.1.6 Importing Activity Codes with Excel	217
23.2 User Defined Fields	217
23.3 WBS Category or Project Phase	219
23.4 Resource Codes	220
23.5 Cost Accounts	221
23.6 Owner Activity Attribute	222
23.7 Assignment Codes – P6 Version 20 Enhancement	222
23.8 Role Codes – Version 20 Enhancement	224
24 GLOBAL CHANGE	225
24.1 Introducing Global Change	225
24.2 The Basic Concepts of Global Change	225
24.3 Important Points	228
25 MULTIPLE USER MANAGEMENT	230
25.1 Multiple User Data Display Issues	230
25.2 Understanding F5	231
25.3 Understanding F10	232
25.4 Preventing other users from changing my project	232

26 MULTIPLE PROJECT SCHEDULING.....	233
26.1 Default Project	233
26.2 Multiple Projects in One Primavera Project.....	233
26.3 Multiple P6 Primavera Projects Representing One Project.....	234
26.4 Setting Up Primavera Projects as Sub-projects	236
26.4.1 <i>Opening One or More Projects.....</i>	236
26.4.2 <i>Creating a WBS for Multiple Projects</i>	237
26.4.3 <i>Understanding the Default Project</i>	237
26.4.4 <i>Multiple Projects with Different Data Dates - Version 19 and Earlier.....</i>	239
26.4.5 <i>Data Date Selection in Multiple Project Scheduling - P6 Version 20 Enhancement.....</i>	240
26.4.6 <i>Multiple Project Scheduling Options Selection- P6 Version 20 Enhancement.....</i>	240
26.4.7 <i>Total Float Calculation.....</i>	242
26.5 Setting Baselines for Multiple Projects	242
26.6 Restoring Baselines for Multiple Projects	243
26.7 Tracking Window.....	246
27 EXPORTING AND IMPORTING.....	249
27.1 Supported Project File Types	250
27.2 Other Data Files Types	252
27.3 Send Project.....	253
27.4 Unable to import a XER created in a later version of P6..	253
27.5 Importing from Excel.....	253
27.5.1 <i>Notes and/or Restrictions on Export.....</i>	254
27.5.2 <i>Notes and Restrictions on Import.....</i>	255
27.5.3 <i>Importing and Exporting to Microsoft Project.....</i>	257
27.6 Importing from another P6 Database.....	258
27.7 Import and Export Filters.....	258
27.8 Import or Export data with Keystroke recorders	258
27.9 Importing Activity Codes into P6 using and XER file and Excel.....	259
27.10 Lean Tasks may be imported using an XML file	261
27.11 Why will my import not work?	262
28 OTHER TOOLS AND FEATURES.....	263
28.1 Check In and Check Out.....	263
28.2 Activity Discussion Feature	263
28.3 Advanced Schedule Options	263
28.4 Reflection Projects.....	264
28.5 Who Has the Project Open?	265
28.6 Deleting Mass Data from a Project.....	265
28.7 Managing P3 and SureTrak files.....	265

99 TRICKS & TRAPS

FOR ORACLE PRIMAVERA
P6 PPM PROFESSIONAL

28.8 Finding a Bar in the Gantt Chart	265
28.9 Check for Open Ends	265
28.10 Chasing or Tracing Logic.....	266
28.11 Why have I got Negative Float?	266
28.12 Causes of Rounding Errors in P6	267
28.13 Store Period Performance – P6 Version 19 and Earlier ...	268
28.14 Different Projects may have different Financial Periods – P6 Version 20 Enhancement.....	269
28.15 What are the differences in P6 Versions?	270
28.16 I am on a Virtual Machine and Help will not load?.....	270
28.17 Installing two versions of P6.....	270
29 USEFUL WEBSITES.....	271
30 INDEX.....	273

Sample book with two chapters

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:

Display	Name	Timescale	User Start Date	User Finish Date	Filter	Preview
<input type="checkbox"/>	Activity Name on	Current Bar			Normal or Level of I	
<input type="checkbox"/>	Finish Constraint	Remain Bar			Has Finish Constrai	
<input type="checkbox"/>	Dates on Bar	Current Bar			All Activities	
<input checked="" type="checkbox"/>	Milestone	Current Bar			Milestone	◆ ◆
<input checked="" type="checkbox"/>	% Complete	% Complete Bar			Normal	██████
<input checked="" type="checkbox"/>	Summary	Current Bar			Summary	██████████
<input checked="" type="checkbox"/>	Float Bar	Float Bar			Not Started or In Pri	██████████
<input checked="" type="checkbox"/>	Neg Float Bar	Neg Float Bar			Negative Float	██████████

Bar Style		Bar Settings		Bar Labels	
Grouping Band Settings					
<input type="checkbox"/>	Show bar when collapsed	<input checked="" type="checkbox"/>	Show bar for grouping bands		

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:

Display	Name	Timescale	User Start Date	User Finish Date	Filter	Preview
<input type="checkbox"/>	Dates on Bar	Current Bar			All Activities	
Bar Style		Bar Settings			Bar Labels	
Position		Label				
Left		Start				
Right		Finish				

8.4 Baseline Bar Disappearing when a Activity is made an LOE

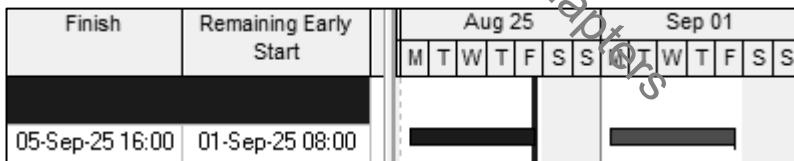
Often, after a Baseline has been set, there is a requirement to add more detail to a baselined activity but retain a view of the original Baseline bar. This may be achieved by converting the original Activity to an LOE and adding the detailed activities below the LOE and linking the new activities to 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					
Display	Name	Timescale	User Start Date	Filter	Preview
<input type="checkbox"/>	Project Baseline Bar	Project Baseline Bar		All Activities	
<input type="checkbox"/>	Project Baseline MS	Project Baseline Bar		Milestone	▼

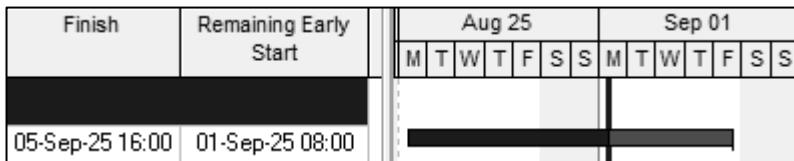
8.5 Why is there a gap in my Bar on the Data Date

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:



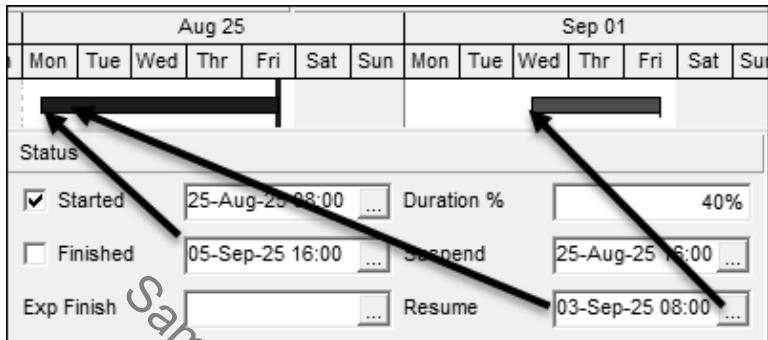
- ❖ To prevent this set the **Data Date** to the Activity Calendar Start Date and Time, i.e. the **Remaining Early Start** date and time:



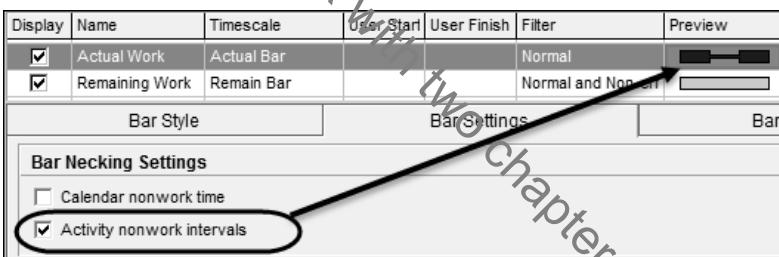
NOTE: Microsoft Project normally defaults the **Status Date** to the end of a day, not the start.

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

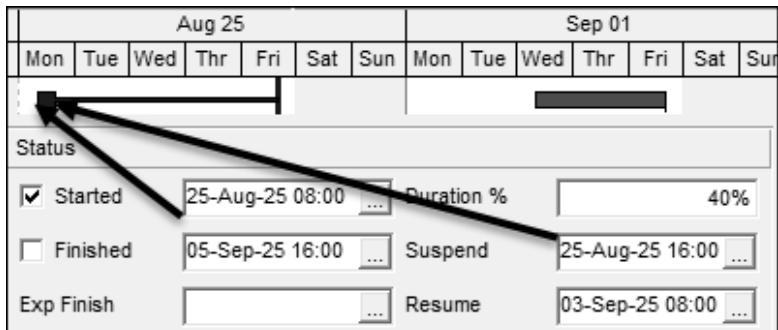
Oracle Activity Layouts do not neck and display a Suspend Date on an Actual Bar:



- 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 will be as per below:



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	Is	Parameter/Value	Operator	Parameter/Value
	Free Float Start	=	Remaining Early Finish		
And	Free Float Value	=	Free Float	/	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
<input checked="" type="checkbox"/>	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 your bars as follows in the **Bars** form:

Display	Name	Timescale	Filter	Preview
<input checked="" type="checkbox"/>	Primary Baseline	Primary Baseline Bar	All Activities	—
<input type="checkbox"/>	Primary Baseline	Primary Baseline Bar	Milestone	▼
<input type="checkbox"/>	Primary Baseline	Primary Baseline Bar	Summary	—

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:

Display all rows	Parameter	Is	Value	High Value
<input type="checkbox"/> (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
<input checked="" type="checkbox"/>	Project Baseline Bar	Project Baseline Bar			All Activities	
<input checked="" type="checkbox"/>	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.

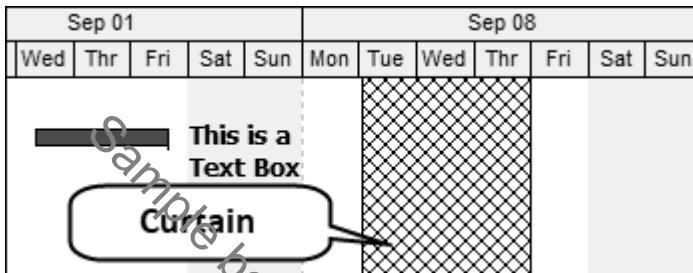
Dec 13					Dec 20					Dec 27									
M	T	W	T	F	S	S	M	W	T	F	S	S	M	T	W	T	F	S	S

- ❖ 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.

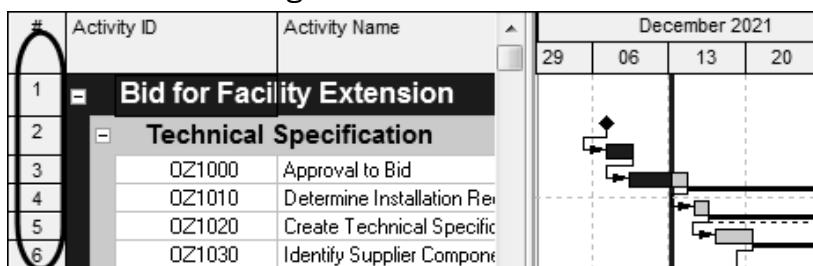
- ❖ **A Text Box** will be attached and move with the activity.
- ❖ **Curtains** are useful for highlighting holidays etc. and are only displayed in the Layout they are created in:



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.



13 FILTERS

13.1 Understanding Filters

Primavera has an 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 not 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 display 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.

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 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 lack off often results in a proliferation of Global filters so all users of a project can 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 users use Layout filters .

13.3 Applying a Filter

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 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 some of the existing Global filters and look at them,
- ❖ Look at other filters if they exist, or
- ❖ Buy one of my other P6 books.

13.5 Understanding Resource Filters

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

13.6 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.

Display: Filter				
Display all rows	Parameter	Is	Value	High Value
<input type="checkbox"/> (Any of the following)				
Where	Predecessor Details	contains	SS	
Or	Predecessor Details	contains	SS	
Or	Successor Details	contains	FF	
Or	Successor Details	contains	FF	

- ❖ 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.

Display all rows	Parameter	Is	Value	High Value
<input type="checkbox"/> (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
<input type="checkbox"/> (All of the following)				
Where	Activity Name	contains	bid	

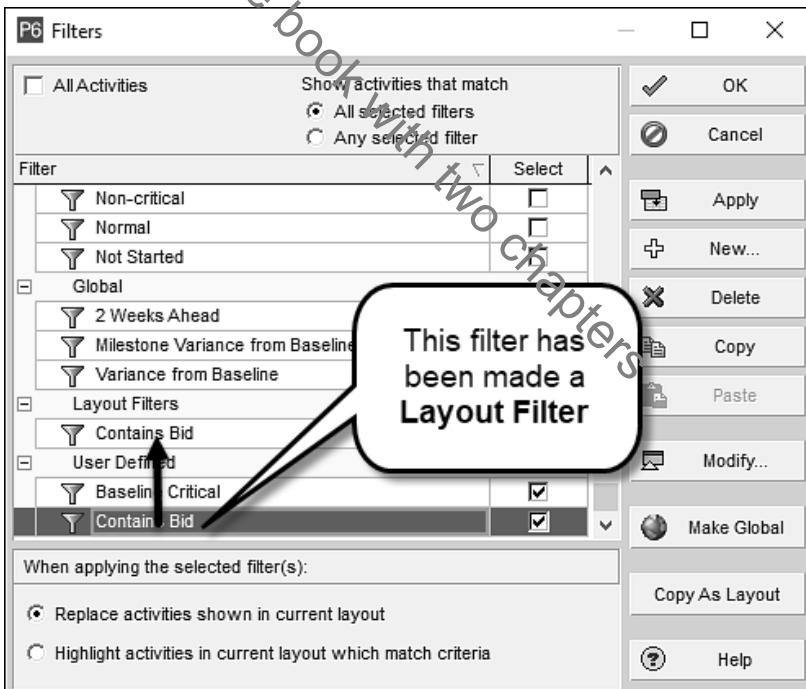
- ❖ Creating a look-ahead filter, filtering on the following parameters:

Display all rows	Parameter	Is	Value	High Value
(Any of the following)				
<input type="checkbox"/>	Where	(All of the following)		
	Wher Activity Status	equals	In Progress	
<input type="checkbox"/>	Or	(All of the following)		
	Wher Start	is greater than	CD	
	And Start	is less than	DD+2W	

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 toolbar in Version 21 titled **Activity Critical Path**.

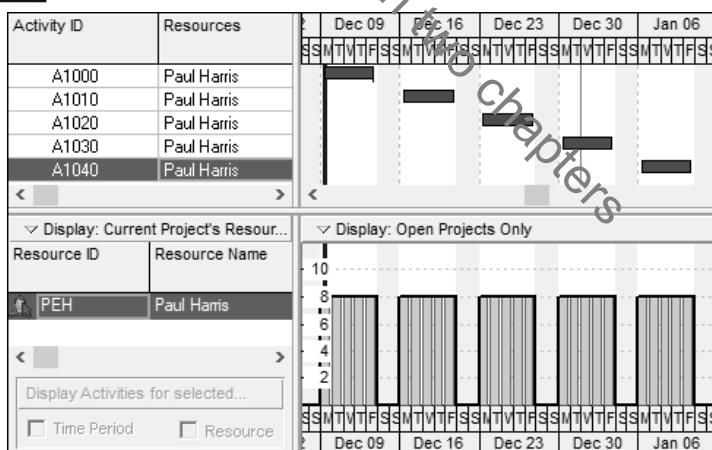
- ❖ The toolbar is displayed by right clicking on any toolbar and checking the **Activity Critical Path** option:
- ❖ This will display the toolbar:
- ❖ **IMPORTANT NOTE:**
Clicking on a button will activate the command and clicking again will deactivate the command

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
A1040	Paul Harris					

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

Activity ID	Resources		Dec 09	Dec 16	Dec 23	Dec 30	Jan 06									
			S	S	T	F	S	I	T	V	F	S	M	T	V	F
A1000	Paul Harris															
A1010	Paul Harris															
A1020	Paul Harris															
A1030	Paul Harris															
A1040	Paul Harris															

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

13.9.2 Increase Maximum Multiple Critical Path Counts



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

13.9.3 Maximum Critical Path Count

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

Selecting one **Maximum Critical Path Count**:

Activity ID	Activity Name	2011			2012			
		Q2	Q3	Q4	Q1	Q2	Q3	Q4
EC1290	Fabricate and Deliver Heat Pump and Controls							
EC1650	Set Heat Pump							
EC1660	Connect Equipment							

Selecting two **Maximum Critical Path Count**:

Activity ID	Activity Name	2011			2012			
		Q2	Q3	Q4	Q1	Q2	Q3	Q4
EC1290	Fabricate and Deliver Heat Pump and Controls							
EC1650	Set Heat Pump							
EC1660	Connect Equipment							
EC1350	Concrete Foundation Walls							
EC1360	Form and Pour Slab							
EC1370	Backfill and Compact Walls							
EC1390	Erect Structural Frame							
EC1420	Floor Decking							
EC1430	Concrete First Floor							
EC1540	Structure Complete							
EC1480	Concrete Second Floor							
EC1550	Brick Exterior Walls							
EC1620	Building Enclosed							
EC1600	Insulation and Built-up Roofing							
EC1640	Install Wiring and Cable							

Thus, this command determines how many chains of events you wish to see.

13.9.4 Decrease Maximum Multiple Critical Path Counts



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

13.9.5 Select Maximum Multiple Critical Path Counts



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

Select Maximum Multiple Critical Path Count

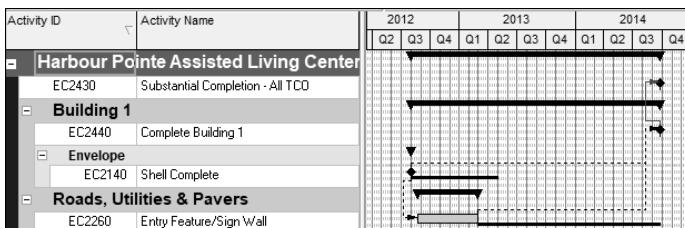
2	3	4	5	
6	7	8	9	10
11	12	13	14	15
16	17	18	19	20

13.9.6 Enable Group and Sort

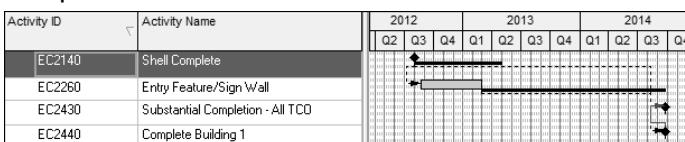


Clicking this button hides and displays the current applied Group and Sort bands. Hiding the bands enables the user to see the chain of events as an uninterrupted single chain of activities:

- ❖ Group and Sort enabled:



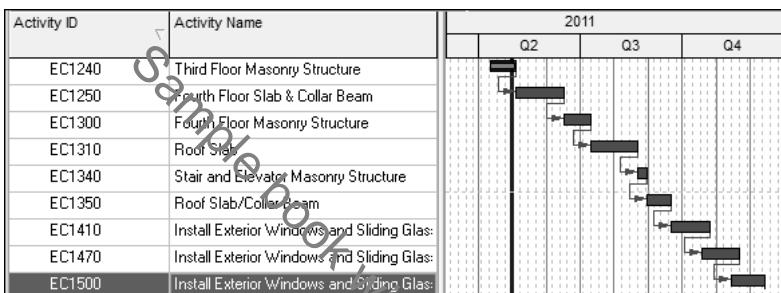
- ❖ Group and Sort disabled:



13.9.7 Backward Activity Critical Path

 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 lease amount of float to the start of the project and display this as the **Backward Activity Critical Path**.

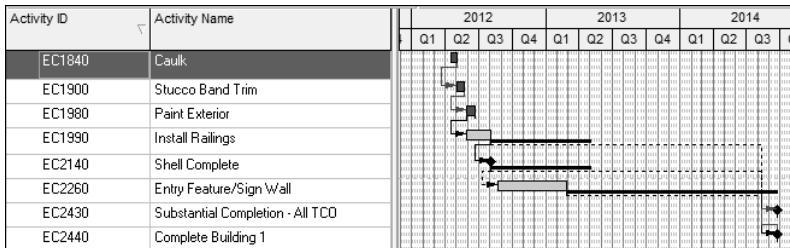
The picture below displays the **Backward Activity Critical Path** from activity EC1500, which is a chain of events that is on the schedule Critical Path.



13.9.8 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 lease 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 EC1840, which is a chain of events that is not on the schedule Critical Path.

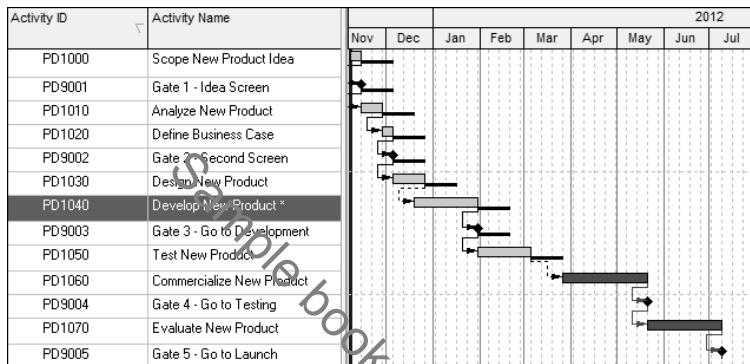


13.9.9 Activity Critical Path



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 PD1040.



% Complete Type.....	206	ANP File Type	80, 252
Access Mode	265	Anticipated Dates	
Activity		Project	39
% Complete.....	129	Application Log File	27
Assigning Calendars	61	Application Startup Window	27
Auto Compute Actuals ...	147, 148	Apply Actuals.....	21, 210
Boxes - Formatting.....	79	Apply selected data date to all open	
Calendar	201	projects	136, 240
Code Color	215	As Late As Possible Constraint... 81	
Codes	213	Assign	
Codes Definition form....	213, 214	Activity Codes form.....	216
Codes form	213	Calendars to Activities	61
Copy	60	Constraints.....	81
Critical Path	94, 98	Resource form	170
Details form	83	Resources	175
Discussion	263	Resources By Roles form.....	168
Dissolving	75	Roles form.....	167, 169
Duration	173	Assigned by	35
In-Progress.....	128	Assigned Date.....	35
Leveling Priority.....	194	Assignment Codes.....	222
Network.....	78, 79	Assignment Staffing.....	30, 160
Network Options.....	79	At Completion Duration.....	128
Network Window	79	Attachments Inserting.....	71
Notebook	83	Audit Trail Columns	34
Percent Complete	41, 130	Auto Compute Actuals.....	147, 211
percent complete based on		Automatically level resources when	
activity steps.....	205, 207	scheduling.....	192
Recording.....	63	Backward Activity Critical Path... 97	
Sorting.....	63	Backward Resource Driven	
toolbar.....	73	Critical Path.....	94
Type.....	162, 206	Bar form.....	137
Usage Profile	180	Bar Label.....	65
Usage Spreadsheet	178	Bar Necking.....	67
Window	204	Baseline	124, 127
Actual		Bars	137
Costs and Quantities	201	Comparing to Progress	137
Dates (similar to Retained Logic)		Batch Reports	21
.....	120	Bucket Planned Resources	182
Duration	128, 201	Bucket Planning	182
Finish.....	39, 108, 127	Calculate Costs from Units	148
Start	39, 108, 127	Calculate float based on finish	
Add		date of	121, 242
New Activity Defaults	57	Calculate start-to-start lag from	120
New Filter.....	91	Calculating Multiple Paths.....	235
Resources.....	144	Calculation form	30
Added By.....	35	Calculations tab.....	159, 161, 171
Added Date	35	Calendar.....	146
Admin Preferences	5	Activity	201
Admin Users	150	Assigning.....	61
Advanced Schedule Options	263	Database Default	48
All Projects use their own data dates		For Scheduling Relationship	
.....	136, 240	Lag.....	123
All Roles Required.....	169	Global	49
Always show full menus.....	33		

99 TRICKS & TRAPS FOR ORACLE PRIMAVERA P6 PPM PROFESSIONAL

Inherit Holidays and Exceptions	54
from a Global Calendar.....	49
Resource	202
Resource Dependent	50
Change the user password.....	28
Check In	263
Check Out.....	263
Circular Relationship.....	73
Claim Digger	12, 99, 105
Closing Down	35
Codes	
Activity	213
Project	19
Resource.....	220
tab 213	
Comments - Relationships	77
Commit Changes	232
Comparing Progress With	
Baseline	137
Compute Total Float as	122
Consent Notice	13, 32
Consider assignments in other	
projects with priority	
equal/higher than	19
Constraints.....	81
Convert another project to a	
new baseline of the	
current project	242
Copy Activity.....	60
Copy Activity Options form.....	60
Copying and Pasting into Excel	188
Cost Account.....	42, 59, 221
Cost Accounts form	221
Cost and Units Budget Values..	200
Cost Spread	10, 152
Cost units linked.....	148
Create Activity Codes	214
Creating Users	22
Currency	15, 26, 145, 230
Current Data Date	131, 136
Curtain.....	71
Curves Resource	197
Data Date.....	39, 201, 239
Data Date formatting	127
Database Default Calendar..	48, 49
Date Formatting	24
Date Picker box	25
Decrease Maximum Multiple Critical	
Path Counts	96
Default	
Calendar.....	230
Currency	15
Duration	6
New Activities	57
Project	45, 115, 233, 237
Project Schedule Options	237
Resource Rates	157
Units/Time	146
WBS Node Separator	54
Define critical activities as.....	120
Delete Element(s)	54
Delete Key	89
Details form.....	129
Details Status form.....	161
Disable Auto-Reorganization	89
Discussion.....	263
Discussion tab	263
Display Actuals using Financial	
Period data.....	17
Display the Role Limits based	29
Dissolving Activities	75
Document Security	9
Drive Activity Dates.....	158
Drive activity dates by default	43, 157
Duration	
% Complete	111, 129
Actual.....	128, 201
At Completion.....	128
In-Progress Activity	128
Original	128
Remaining	128
Type	40, 57, 165
Duration Format	23
Early	
Finish	107
Start	107
Earned Value Calculation.....	7
Edit Resource Usage	
Spreadsheet.....	182
Effective Date.....	149, 151
Elapsed Duration	51
Email.....	26
Enable Group and Sort.....	96
Engineering and Construction	12
Enterprise Group and Sort.....	88
Enterprise Portfolio Project	
Management.....	4
EPPM	4
ERP File Type	252
Exception Site List	14
Exchange Rate	15
Exclusive.....	236, 265
Expected Finish.....	82
Expenses	174
Expenses Window	174
Exporting Filters	93
External Dates	82, 116, 258
External Early Start	82, 116
External Late Finish.....	82, 116
F10.....	232
F5 231	
File Types	
ANP	80, 252
ERP	252
IPMDAR.....	251
MPP.....	251

MPX	251
PCF	226, 252
PLF	252
XER	250
XLS	252
XML	250
Fill Down	63
Filter	
Add New	91
Default	90
Global	90
User Defined.....	90
User Project	90
WBS.....	92
Filters form	91
Financial Period Calendars	16, 269
Financial Periods.....	16, 28
Finish	
Milestone	163
Variance.....	137
First day of week.....	6
Fixed Duration & Units	40, 57, 166
Fixed Duration & Units/Time	40, 57, 166
Fixed Units	40, 57, 166
Fixed Units/Time	40, 57, 166
Float Path	263
Forecast dates	29, 248
Form	
Activity Codes	213
Activity Codes Definition.	213, 214
Activity Details.....	83
Assign Activity Codes	216
Assign Resource.....	170
Assign Resources By Roles	168
Assign Roles	169
Bars	137
Calculations	30
Copy Activity Options.....	60
Cost Accounts.....	221
Details.....	129, 131
Details Status	161
Filter By	169
Filters	91
Group and Sort.....	84
Level Resources.....	192
Project Details	57, 59
Resource Codes	220
Role Codes.....	224
Schedule.....	136
Select Code	216
Sort.....	88
Trace Logic Options	80
User Password.....	28
User Preferences	46, 176
Format	
Activity Boxes.....	79
Columns.....	69
Row Height.....	70
Forward Activity Critical Path.....	97
Free Float Bar	68
Freeze Units per Time Period	196
Gantt Chart Legend	102
Ghost Relationships	242, 243, 244,
245	
Global	
Access tab.....	234
Calendar.....	49, 146
Change	225
Security Profile.....	18
Government, Aerospace, and	
Defense	12
Group and Sort	84
Enterprise.....	88
Group and Sort form	84
Group By	86
Hide if empty.....	87
Highlight	90
High-Technology	12
Histogram Bars Exact Values	184
Hours per Time Period	6
Ignore relationships to and	
from other projects.....	116
Importing Activity Codes with	
Excel	217
Increase Maximum Multiple	
Critical Path Counts.....	95
Industry	11
Inherit Holidays and Exceptions	
from a Global Calendar.....	49
Inserting Attachments.....	71
Interval for time-distributed	
resource calculations:.....	29
IPMDAR File Format	251
Job Service	9, 20, 21, 246
Ladder scheduling	76
Language	34
Late Finish	108
Late Start	108
Lean Tasks.....	261
Level of Effort	162
Level resources during	
scheduling.....	118
Level Resources form	192
Level resources only within	
activity Total Float	193
Leveling	191
Leveling priorities - resources	194
Limits.....	196
Line Numbers	71
Linear Spread	153
Link Actual to date and Actual	
This Period Units and Cost	207
Link actual to date and actual	
this period units and costs...	16

99 TRICKS & TRAPS

FOR ORACLE PRIMAVERA
P6 PPM PROFESSIONAL

Link Budget and At Completion	Start 38, 109
for not started	PLF File Type 252
activities 128, 156	Portfolio Analysis 29
Link Budget and At Completion	Portfolios 34
for started activities is	PPM 4
unchecked 109	Predecessor Details 76
Load Financial Period data..... 28	Preserve scheduled early and late
LOE 162	dates 193
Longest Path..... 45, 121	Preserve the Units, Duration, and
Make open-ended activities	Units/Time for existing
critical..... 45, 116	assignments 30, 160
Mandatory Constraints 83	Primary Role 142
Material Resources 15, 145	Primavera Change File PCF 226
Merge Element(s)..... 54	Printing 99
Modified By 35	Page Setup 101
Modified Date 35	Print Preview 101
MPP File Type 251	Section Content 102
MPX File Type 251	Priority – Activity Leveling 194
Multiple critical path..... 115, 116	Professional Project
Must Finish By date..... 38, 193	Management 4
Negative Float..... 266	Proficiency 142, 150
New Activity Defaults 57	Progress
New Project Wizard 36	Line 138
Node Separator 54	Override 118, 119
Notebook Activity..... 83	Spotlight 133
Notebook Topics..... 14	Project
Notes tab 150	Architect 9
Online Help 9	Bar Charts 247
Open Ends..... 265	Calendar 42
Organizational Breakdown	Codes 19
Structure 18	Details form 57, 59
Original	Finish Date 39
Duration 128	Gantt/Profiles 247
Duration,Resource 158	ID 36
Lag,Resource 158	Must Finish By Date 37
Outlining..... 213	Phase 219
Overtime..... 146	Security Profile 18
Owner 163	Tables 247
Owner Activity Attribute..... 222	Toolbar 174
Parameter/Value for Global	Web Site Publisher 99
Changes 229	Publish to a Web Site 105
Past Period Actuals 269	Rate Type 10, 157
PCF File Type 226, 252	Rates for Roles 142
Percent Complete	Read Only 230, 236, 265
Activity % Complete 41, 130	Recalculate Actual Units and Cost
Physical % Complete 41, 130	when duration % complete
Type 41, 59	changes 207
Units % Complete 41, 130	Recalculate assignment costs
Updating 210	after leveling 193
Personal Identifiable Information	Recalculate Cost Assignment 151
Personal Information 13	Recalculate resource costs after
PERT 78	scheduling 118
Physical % Complete 129	Recalculate the Units, Duration,
PII - Personal Identifiable	and Units/Time for existing
Information 32	assignments based on the
Planned	activity Duration Type 30, 160
Dates 109	Recording Activities 63
Finish..... 109	Reflection project 264

Refresh Data	231	Schedule automatically when a change affects dates	118
Relationship Colors.....	72	Schedule Comparison	12, 99, 105
Relationship Comments	77	Schedule form	136
Remaining		Schedule Options	114, 237
Duration	128, 129	Schedule Updating	131
Early Finish	113	SDK	254
Early Start	113	Section Content - Printing	102
Start	129	Select Code form	216
Renumbering Activity IDs	60	Select Subject Area	227
Reporting.....	99	Send Project	253
Reports Publish to a Web Site	105	Sequencing Logic	190
Resource		Set Language	34
Adding	144	Shared	236, 237, 265
Analyses Layout	247	Shifts	149
Analysis.....	28	Show	
Assigning.....	171, 175	full menus after a short delay ...	33
Assignments	160	Grand Totals	85
Assignments Window.....	187	Group Totals	84
Auto Compute Actuals	147	Name/Description.....	87
Calendar	146, 202	Summaries Only	85
Codes	144, 220	Title, Show ID/Code	87
Codes form	220	Shrink vertical grouping bands ..	86
Cost	155	Software Developers Kit	254
Curves	197	Sort Banding Alphabetically	87
Default Rates	157	Sort form	88
Dependent.....	162	Sorting Activities	63
Dependent Calendar.....	56	Spell Check	63
Labor	154	Stacked Histogram	185
Lag.....	174	Staffed Remaining Units	140
Leveling.....	190, 191	Staffed Roles	169
Limit	196	Stand Alone	4
Nonlabor	154	Start	
Original Duration	158	Milestone	163
Original Lag,.....	158	Variance	137
Proficiency	150	Startup Filters	31
Quantity.....	155	Status	127
Rate Type	157	Status Date	39
Removing.....	171	Status of User Acceptance	13
Shifts	149	Status tab	131
Types	145	Steps	204
Updating	210	Store Period Performance	16, 207, 268
Usage Profile	183	Stored Images	102
Usage Spreadsheet	181	Successor Details	76
Resources Window	143	Summarize	9
Responsibilities	142	Summarized Data	8, 9
Restoring Baselines.....	243	Summarizing Projects	20
Resume.....	135	Suspend and Resume.....	62, 135
Retain Lag.....	75	Tab	
Retained Logic	118, 119	Calculations	159, 161, 171
Role		Codes	213
Codes	224	Discussion	263
ID, 142		Notes	150
Name	142	Roles	150
Roles tab	150	Status	131
Row Height Formatting.....	70	Timesheets	150
Save a copy of the current project as a new baseline	242, 243	Task Dependent	162

Terminology	12
Text Boxes.....	71
Time Periods.....	6
Time Units	23
Time-Distributed Data.....	29
Timescale Finish.....	103
Timescale Start.....	103
Timescaled Logic Diagram	105, 215
Timesheets	117, 150, 207
Timesheets tab.....	150
To Level	86
Toolbar	
Activity	73
Project	174
Tools	133
Top Layout	78
Tools toolbar	133
Top Layout toolbar	78
Total Float Calculation	242
Total Float less than or equal to.....	120
Trace Logic.....	80
Options form	80
Tracking Layout	246
Tracking Window	29, 246
TSLD	105
Type	
Duration	40, 57
UN/CEFACT XML.....	251
Undo	63
Unit Spread	153
Units % Complete	129
Units Display	17
Units of Measurement	15
Unstaffed	
Remaining Units	140
Roles Required:	169
Roles with Required Proficiency.....	169
Update	
Activity	131
Progress	111, 133, 134
Schedules	131
Updating a Complete activity ...	132
Updating a Resourced Schedule	202
Updating an activity that has not started.....	132
Updating an In-progress activity	132
Updating Expenses.....	211
Updating the Schedule.....	206
Use Expected Finish Dates	117
Use scheduling options from	44, 45, 115, 238
User	
Baselines.....	34
Defined Fields.....	217
Password form	28
Preferences	22, 23
Preferences form.....	46, 176
User Preferences Personal	
Information.....	13
Users form.....	234
Users may See and Set Activity	
Start and Finish Times in the Date Picker box.....	25
Utilities, Oil, and Gas	12
Visualizer	99, 105, 215, 252
VLF File Type	252
WBS	
Categories	55
Category	219
Filters	92
Node Separator	43, 54
Summary Activity	164
Web	
Access Server.....	9
Client.....	4
Site.....	105
Site Publisher.....	99
When scheduling progressed activities use	118
Window	
Activity Network	79
Application Startup.....	27
Resources	143
Tracking.....	29
Windows Client	4
Wizards.....	26
XER File Type.....	250
XLS File Type	252
XML File Type	250
Zero Free Float.....	81