

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

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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.

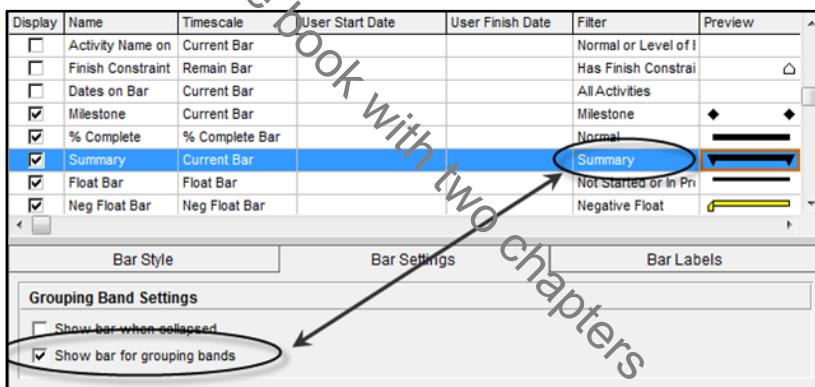
You have several choices for sorting out the bar formatting:

- ❖ 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:

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

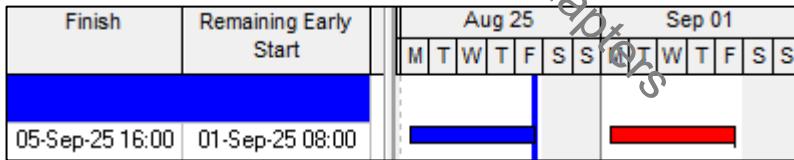
Often, after a Baseline has been set, there is a requirement to add more detail to a baselined activity but retain a view of the original Baseline bar. This may be achieved by converting the original Activity to an LOE and adding the detailed activities below the LOE and linking the new activities to 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	

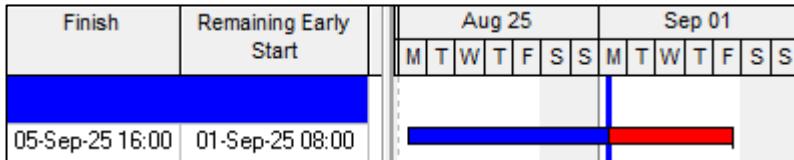
8.5 Why is there a gap in my Bar on the Data Date

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:



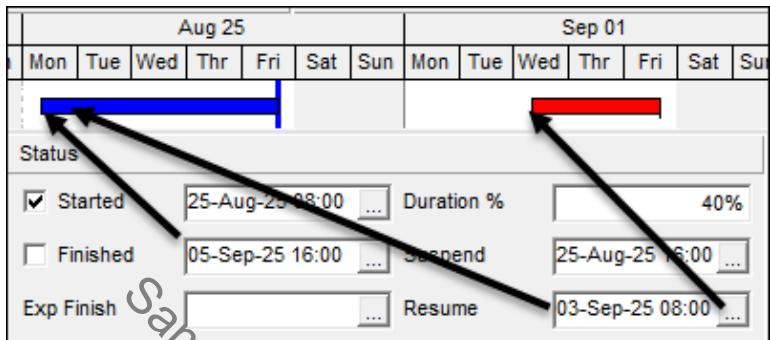
- To prevent this set the **Data Date** to the Activity Calendar Start Date and Time, i.e. the **Remaining Early Start** date and time:



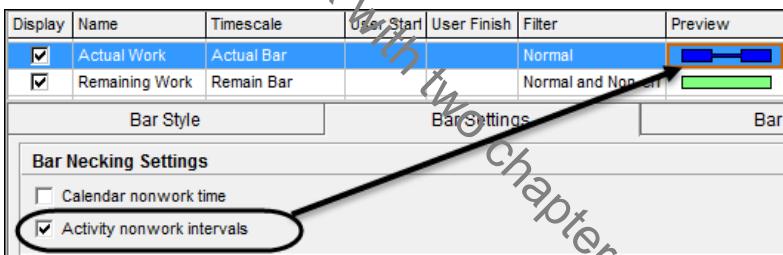
NOTE: Microsoft Project normally defaults the **Status Date** to the end of a day, not the start.

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

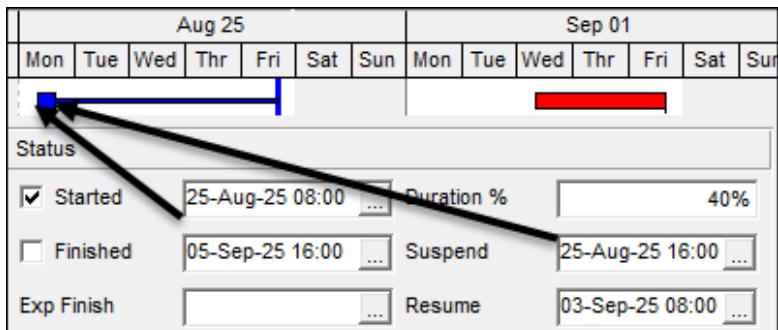
Oracle Activity Layouts do not neck and display a Suspend Date on an Actual Bar:



- 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.

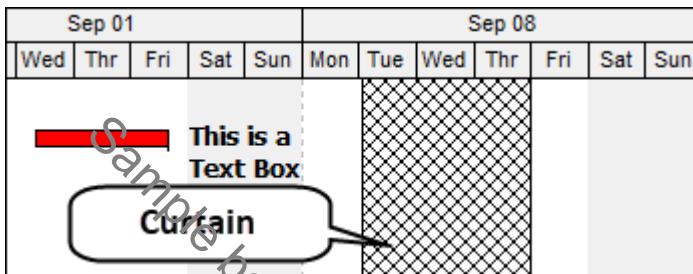
		Dec 13		Dec 20		Dec 27									
		M	T	W	T	F	S	S	M	T	W	T	F	S	S

- ❖ 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.

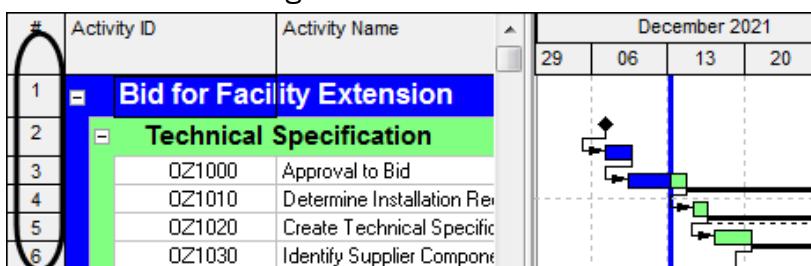
- ❖ A **Text Box** will be attached and move with the activity.
- ❖ **Curtains** are useful for highlighting holidays etc. and are only displayed in the Layout they are created in:



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
□ (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
□ (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	

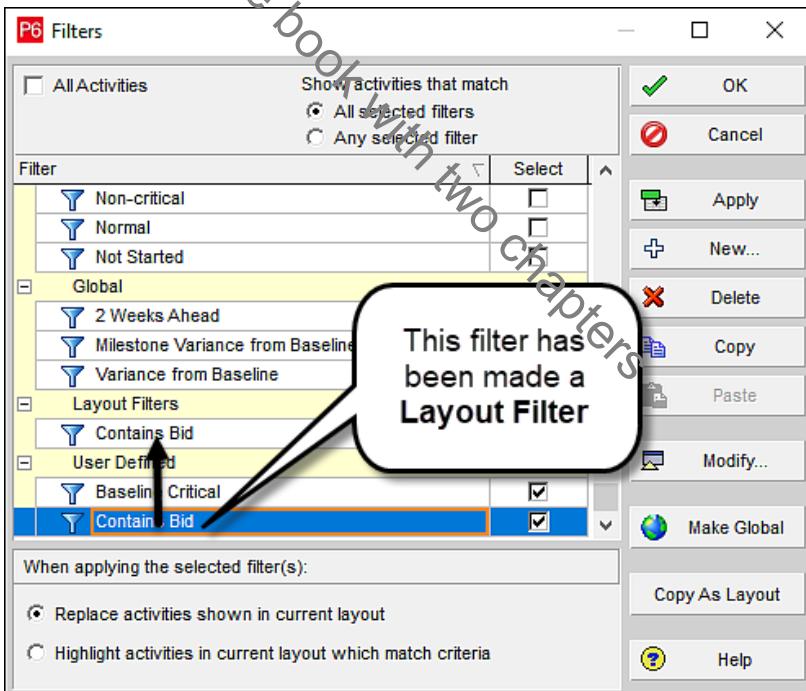
- ❖ Creating a look-ahead filter, filtering on the following parameters:

Display all rows	Parameter	Is	Value	High Value
<input type="checkbox"/> (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

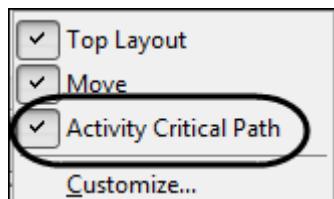
Filters may not be exported on their own, but if you wish to export a filter then it may be made a **Layout** filter by using the **Copy As Layout** command in the **Filters** form and then have the Layout exported:



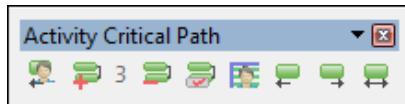
13.9 Activity Critical Path Visibility Toolbar

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:**



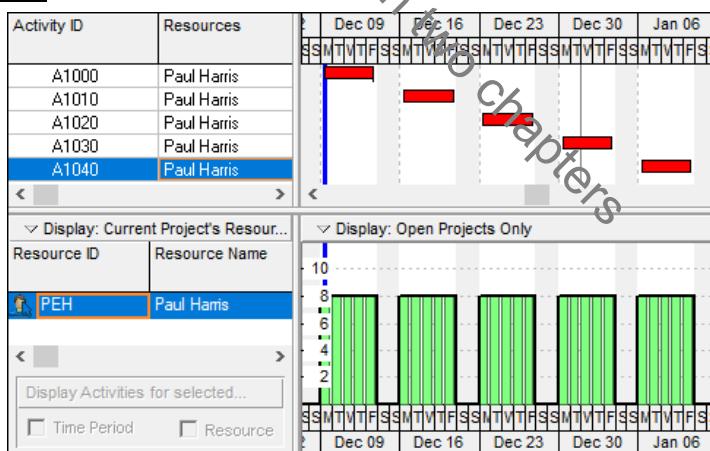
Clicking on a button will activate the command and clicking again will deactivate the command

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

13.9.1 Backward Resource Driven Critical Path



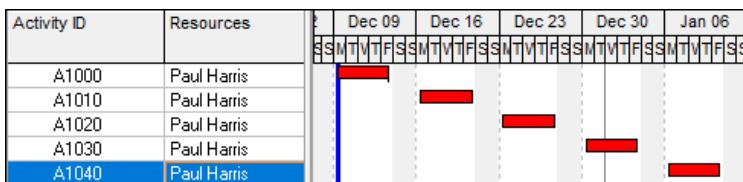
The schedule below has no relationships between activities and has been levelled.



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:



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

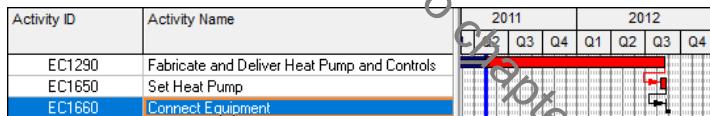


This increases the value of the **Maximum Multiple Critical Path Counts** which is displayed in the button below.

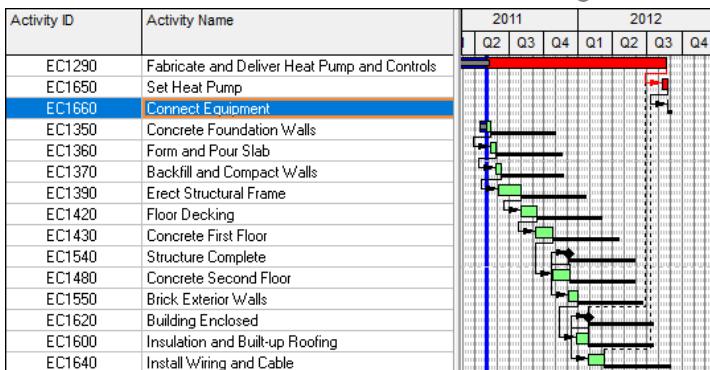
13.9.3 Maximum Critical Path Count

 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**:



Selecting two **Maximum Critical Path Count**:



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

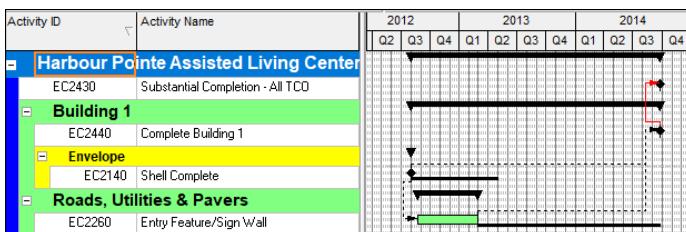
2	▼	Select																				
<table border="1" style="margin-left: auto; margin-right: auto;"> <tr><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td></tr> <tr><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td></tr> <tr><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td></tr> <tr><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td></tr> <tr><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td><td style="width: 25px; height: 25px;"></td></tr> </table>																						
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13.9.6 Enable Group and Sort

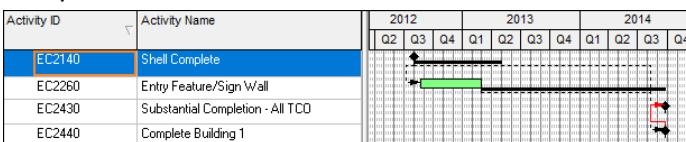


Clicking this button hides and displays the current applied Group and Sort bands. Hiding the bands enables the user to see the chain of events as an uninterrupted single chain of activities:

- ❖ Group and Sort enabled:



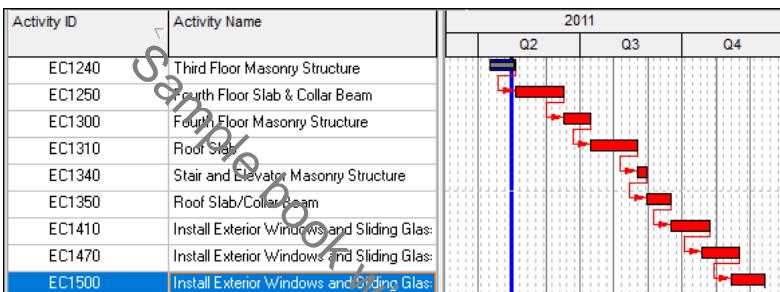
- ❖ Group and Sort disabled:



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**.

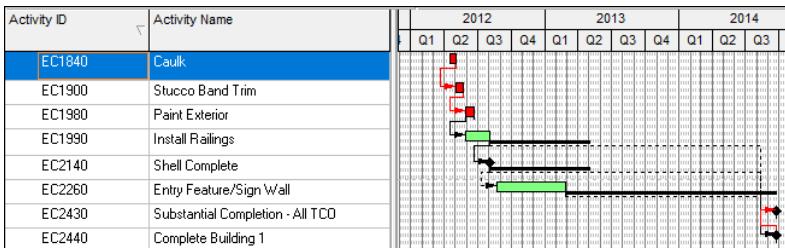
The picture below displays the **Backward Activity Critical Path** from activity EC1500, which is a chain of events that is on the schedule Critical Path.



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**.

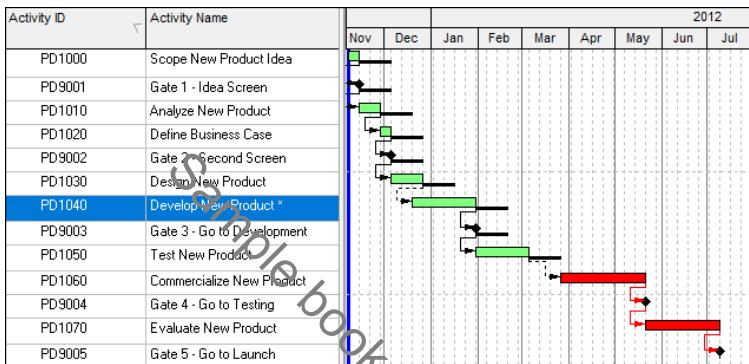
The picture below displays the **Forward Activity Critical Path** from activity EC1840, which is a chain of events that is not on the schedule Critical Path.



13.9.9 Activity Critical Path

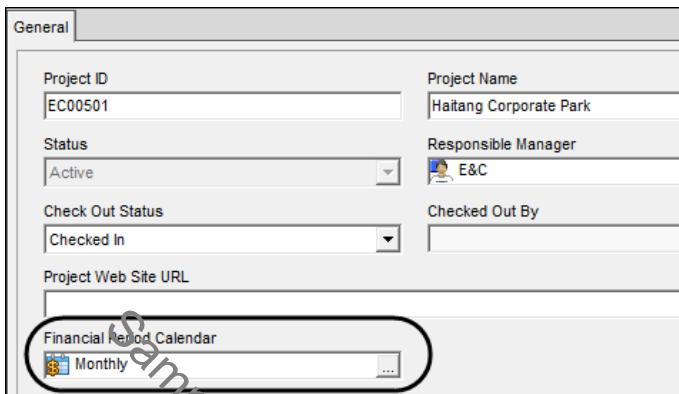
 This option displays the chain of events before and after a selected activity that has the least amount of Float, as per the parameters above.

Thus, the picture below shows both the **Forward Activity Critical Path** and **Backward Activity Critical Path** from Activity PD1040.



The **Financial Period Calendar** is assigned to a Project in:

- ❖ The Projects Window, General tab, or
- ❖ By displaying the Financial Period Calendar column:



NOTE: This function did not work in the authors P6 Version 20.12.0.37740, but updates should fix this issue. As an interim you may change the **Default Financial Period Calendar** before creating a project.

28.15 What are the differences in P6 Versions?

Oracle Technology Network website has an Excel spreadsheet called the **Cumulative Feature Tool** which displays changes in versions and bug fixes.

28.16 I am on a Virtual Machine and Help will not load?

In this situation, you should copy and paste the URL displayed in the browser that has opened in your virtual machine and paste it into a browser that does work.

28.17 Installing two versions of P6

There are documents available that explain how to install two version of P6 on one machine.

On the other hand, I prefer not to install P6 on my machine at all, and I install P6 on a Virtual machine, which allows me to run any version at any time. I also have a VM for each customer, so I can back up and/or share all my customers work with my customer by sharing a VM and I am not giving them all my other customers information.

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/construction-engineering/> 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.

Sample book with two chapters

% Complete Type.....	206
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Activity	
% Complete.....	129
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