

Welcome to the
Eastwood Harris Pty Ltd
Primavera P6 Version 7
presentation:

**“What Baseline Bars am I
Displaying”**



Introduction

- There are several P6 functions that control what data is displayed as the Baseline Bars,
- Often it is not the Baseline Start and Finish Dates that are displayed as Baselines Bars, but the Planned Dates,
- When a schedule has no progress then normally the Planned Dates are equal to the Start and Finish Dates and the intended dates are displayed as a Baseline,
- But when a progressed schedule is being used as a Baseline, then the Planned Dates are often represent irrelevant data and therefore the Baseline bars are also displaying irrelevant data,
- It is unfortunate that often the Primavera Defaults display the Planned Dates and not the Start and Finish Dates from a Baseline schedule as the Baseline Bars making it simpler to display irrelevant Baseline Bars.



Aim of the Presentation

The aim of this presentation is to explain:

- The different types of project schedule Baselines,
- How the Planned dates are calculated,
- Why the Planned Dates often display irrelevant data,
- The issues with the Planned Dates,
- What functions control the display of the Planned Dates as Baseline Dates,
- How to ensure you have the Baseline Dates and not the Planned Dates displayed as Baseline Bars,
- **NOTE:** This presentation goes into some very complex issues.



Baseline Types

- There are two type of Baselines that are often saved with scheduling software such as P6,
- **Management Baselines** and
- **Last Period Status,**



Management Baselines

- These are usually a copy of an original unprogressed schedule that has been contractually agreed as the Baseline or Target schedule and are used to:
- Evaluate progress and report progress to a client or customer,
- Extension of Time claims and other contractual may be made based on these Baseline schedules.



Last Period Status - Baselines

- These are copies of a schedule at a point in time and are used for the management of a project,
- Usually they are used to measure the loss in time from one reporting period to another,
- Thus allowing management to ascertain performance and make decisions on how to manage the project,
- They are displayed in exactly the same way as Management Baselines with the software,
- These Baselines usually, after the first period update have progress.



Planned Start and Finish Date Calculation

- The Planned Dates are very complex and their calculation method is outlined in my books, in summary:
- When an activity is **Complete** or **In-progress** they normally match the status of an activity just before it was marked as "Started" by the scheduler,
- When an activity has Not Started they match the Early Start and Early Finish.

Activity ID	Activity Name	Start	Finish	September 2014					October 2014				November 2014				
				25	01	08	15	22	29	06	13	20	27	03	10	17	24
A1010	Activity A	29-Aug-14 08 A	30-Sep-14 17 A	[Blue bar from 29 Aug to 30 Sep]													
A1020	Activity B	22-Sep-14 08 A	31-Oct-14 17														
A1030	Activity C	03-Nov-14 08	28-Nov-14 17														



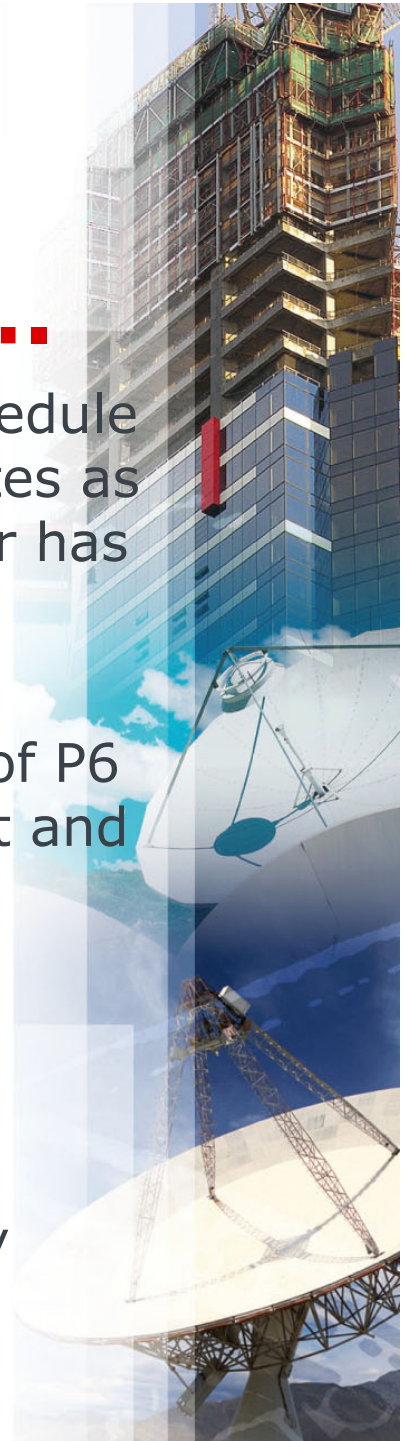
Why Planned Dates are Often Irrelevant Data

- When a scheduler is updating a schedule they often recalculate a schedule during this process,
- At this point in time many activities that have not been started will be rescheduled to new dates,
- The Start and Finish of these rescheduled activities will now no longer match the Start and Finish Dates of the last period or any Baseline,
- At this point in time these dates may be irrelevant especially if they are to be marked as started in the current update,
- When each of these activities is marked as Started then the Planned Start and Planned Finish are now locked to irrelevant date values, this could affect many activities



Why Planned Dates are Often Meaningless Data, continued....

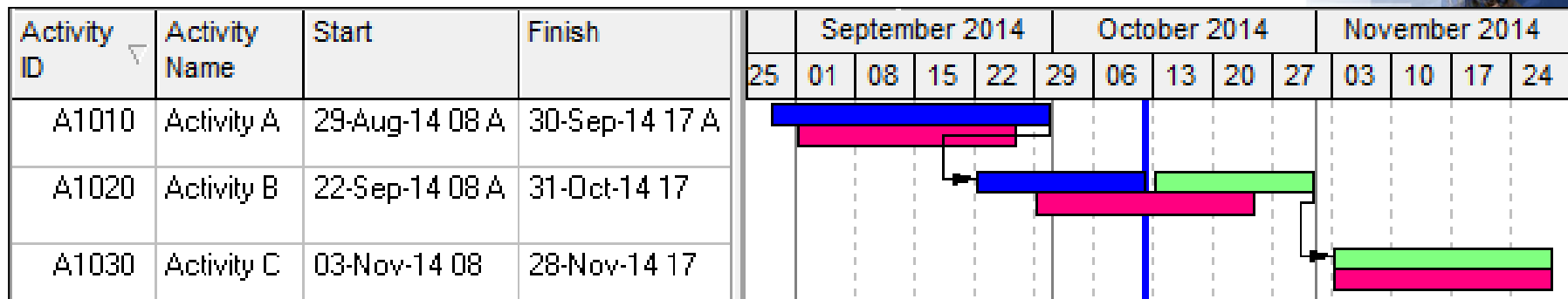
- The Baseline Bars will now display the Baseline schedule Planned Dates as not the Early Start and Finish Dates as one would expect, when the database administrator has not checked and if necessary changed some of the software defaults,
- Users who also do not have a good understanding of P6 will think they are displaying the Baseline Early Start and Finish Dates as Baseline Bars but will actually be displaying the Planned Dates and these may be irrelevant dates,
- The author has reviewed many large Australian companies and usually find that neither users nor administrators understand these functions and they have left the P6 defaults unchanged so the Planned Dates are always displayed as Baseline Bars.



Planned Dates Issues

- The **Planned Dates** are dates that most schedulers would not want displayed,
- These dates are displayed as the **Project Baseline** bars and **Primary User Baseline** bars when no baseline has been assigned,
- These dates are used by the **Apply Actuals** function when tasks are set to **Auto Compute Actuals**, and the **Update Progress** function,

continued...



Planned Dates Issues continued

- The **Planned Dates** will be displayed as the Baseline Bars when the the **Admin, Admin Preferences...**, **Earned Value** tab is set to **Budget values with planned dates** .

Earned value calculation

When calculating earned value from a baseline use

Budgeted values with planned dates

At Completion values with current dates

Budgeted values with current dates

Budgeted values with planned dates



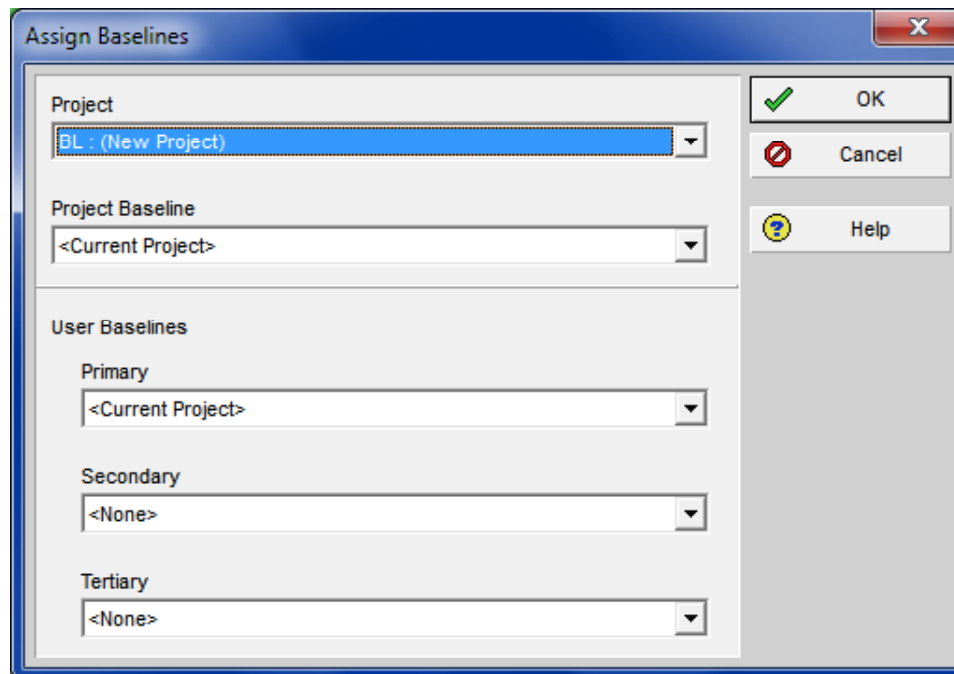
What Functions Control the Display of Dates as Baselines

- The following functions Control the Display of Dates as Baselines:
- The **Project, Assign Baseline** form,
- The **Admin, Admin Preferences, Earned Value** tab,
- The **Project** window, **Calculations** tab **Link Budget and At Completion for not started activities** option,
- We will go through these next,
- **NOTE:** Some people and companies who have discovered the Planned Date issue change the Planned Dates to equal the Start and Finish Dates using a Global Change. This provides an acceptable solution but then the % Duration is no longer is calculated as intended and one has to remember to execute the Global Change at each update.



Project, Assign Baseline form

- When a Project or Primary Baseline is set to **<Current Project>** in the **Project, Assign Baseline** form, then the Planned Dates of the current schedule are displayed as the Baseline Bars,
- NOTE: <Current Project>** here means Planned Dates not the Start and Finish as one would expect!



Assign Baselines

Project
BL : (New Project)

Project Baseline
<Current Project>

User Baselines

Primary
<Current Project>

Secondary
<None>

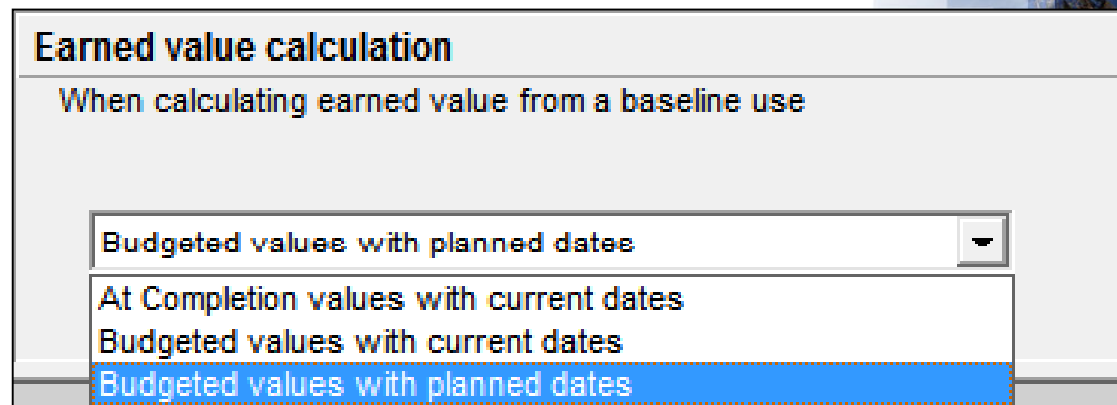
Tertiary
<None>

OK
Cancel
Help



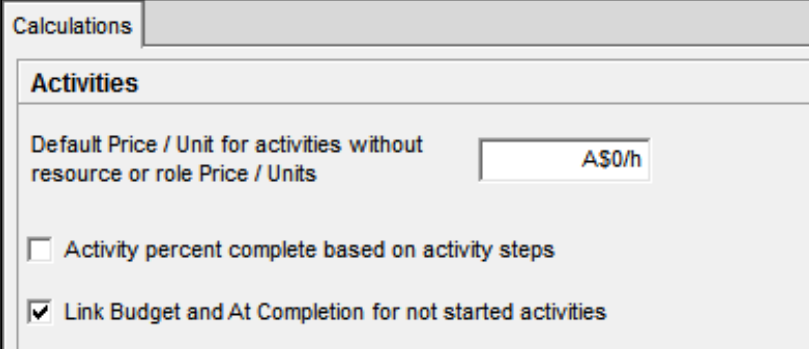
Admin Preferences, Earned Value tab

- When the **Admin, Admin Preferences, Earned Value** tab is set to “**Budget Values with planned dates**” then the Planned dates from the Baseline will be displayed as Baseline Bars when a Project or Primary Baseline has been set,
- **NOTE:** Some versions of P6 display this sentence as “**Planned Values with planned dates**”,
- It has been the authors experience that:
 - This is the default when the software has been loaded, and
 - Most Users and Administrators do not understand this function.



Project window, Calculations tab

- Normally The Planned Finish is calculated from the Planned Start + the Original Duration (or Planned Duration in some versions),
- The Early Finish is calculated from the Early Start + Remanning Duration,
- The Original Duration becomes unlinked from the Remanning Duration, when the **Project** window, **Calculations** tab **Link Budget and At Completion for not started activities** option is unchecked,
- Therefore the Planned Finish also becomes unlinked from the Early Finish for unstarted activities,
- Then an unprogressed Baseline displaying Planned Dates will now also not display the correct Baseline Dates when an Original Duration is changed.



Calculations

Activities

Default Price / Unit for activities without resource or role Price / Units

Activity percent complete based on activity steps

Link Budget and At Completion for not started activities

Summary

- To ensure you have the Start and Finish Dates from a Baseline displayed as Baseline Bars, and not the Planned Dates, make sure:
- The **Admin, Admin Preferences, Earned Value** tab is set to either
 - **At Completion values with current dates**, or
 - **Budget Values with current dates**
- You have a Baseline set in the **Project, Assign Baseline** form,
- Each User will must set their own **Primary User Baseline** when using a Layout created by another person,
- The **Project** window, **Calculations** tab **Link Budget and At Completion for not started activities** option is checked.



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