

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

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



Introduction

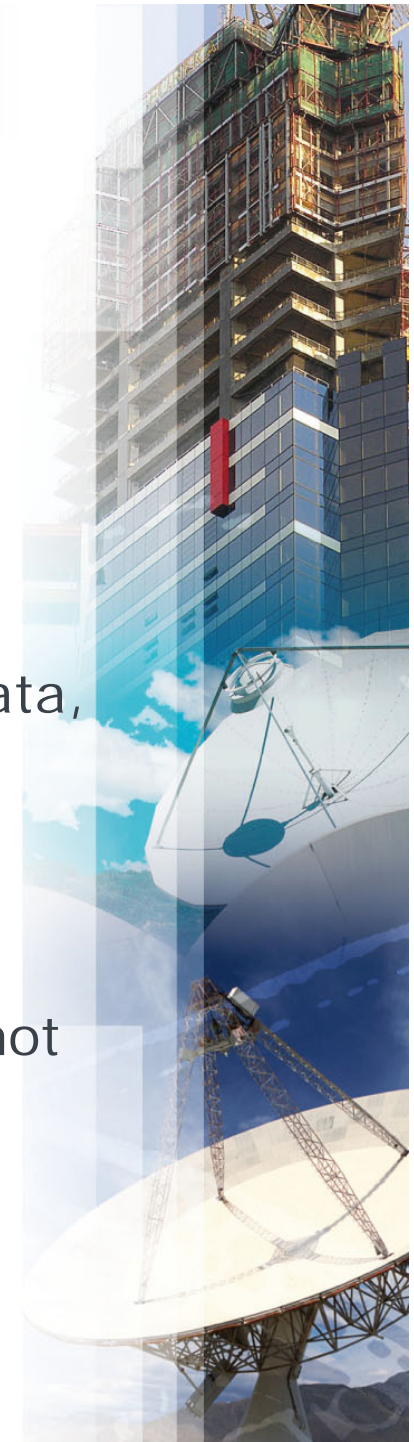
- There are several P6 functions that control what data is displayed as the Baseline Bars,
- Often it is not the Baseline Start and Finish Dates that are displayed as Baselines Bars, but the Planned Dates,
- When a schedule has no progress then normally the Planned Dates are equal to the Start and Finish 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,
- They are often agreed as the Contract Programme and are used to:
 - Evaluate progress and report progress to a client or customer,
 - Evaluate Extension of Time claims and other contractual claims may be made based on these Baseline schedules such as acceleration,



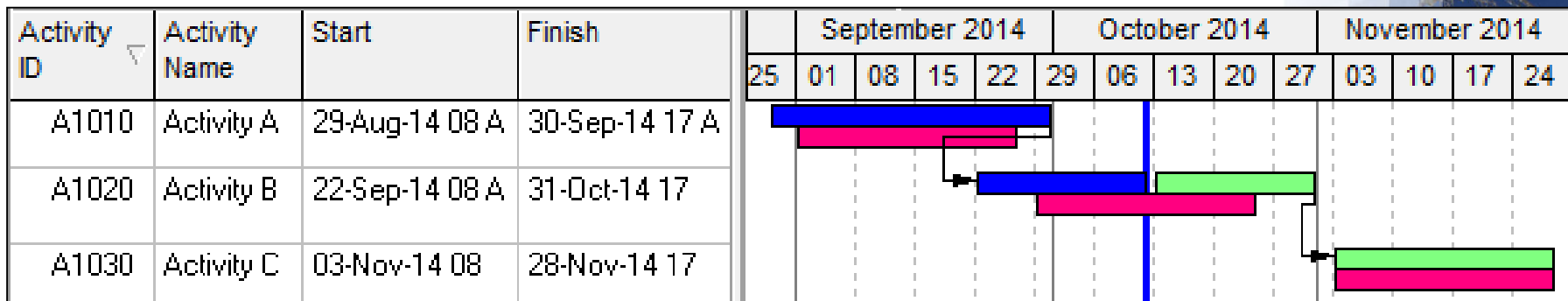
Last Period Status - Baselines

- 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 with the software as Management Baselines,
- These Baselines usually, after the first period update have progress,
- Some companies create Target schedules with earlier finish dates to manage sub-contractors and these may be also be set as a baseline.



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.



Why Planned Dates are often Irrelevant

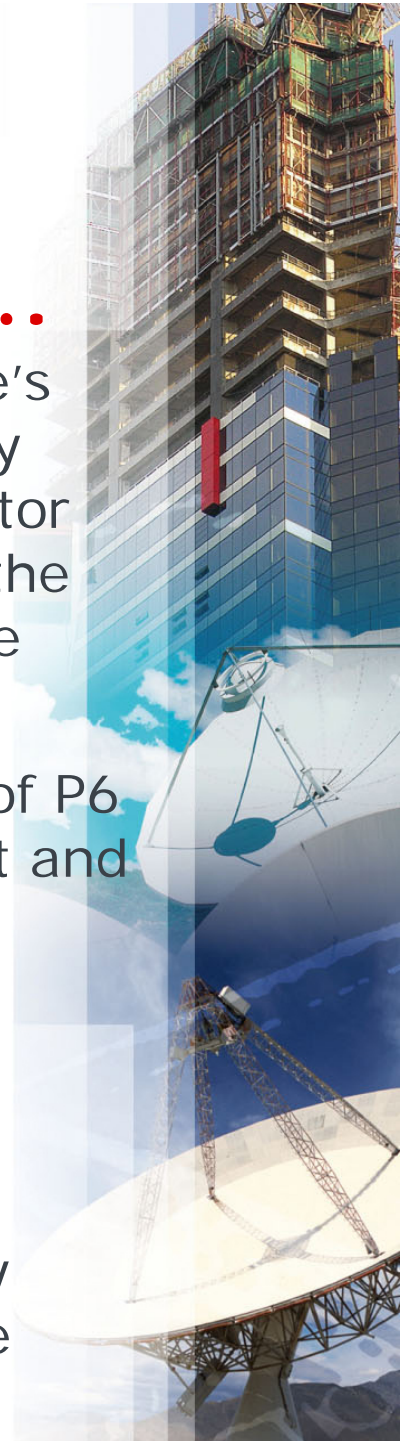
- A scheduler will often recalculate a schedule during the updating process,
- At this point in time, many activities that have not been marked as started will be rescheduled to new dates in the future,
- These rescheduled activities Start and Finish dates will often no longer match either the Start and Finish dates of the last period or where they will be scheduled at the end of the update,
- As each activity is marked **Started** (normally in the past in relation to the Data Date) the Planned Start and Planned Finish are then locked to irrelevant date values in the future,

continued....



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

- The Baseline Bars will display the Baseline schedule's Planned Dates and not the Baseline schedule's Early Start and Finish Dates when a database administrator has not reviewed and if necessary changed one of the database settings, this will often result in a Baseline with progress displaying incorrect Baseline bars,
- 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 are often irrelevant dates,
- The author has reviewed many large companies P6 installation and usually finds that neither users nor administrators understand these functions and they have left the P6 defaults unchanged resulting in the Planned Dates being 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, and **WILL** change user entered Actual Start dates,

continued...

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						[Blue bar from 22-Sep to 31-Oct]								
A1030	Activity C	03-Nov-14 08	28-Nov-14 17											[Green bar from 03-Nov to 28-Nov]			



Planned Dates Issues continued

- The **Planned Dates** will be displayed as the Baseline Bars when 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:
 1. The **Project, Assign Baseline** form,
 2. The **Admin, Admin Preferences, Earned Value** tab,
 3. The **Project** window, **Calculations** tab **Link Budget and At Completion for not started activities** option,
- We will go through these next,



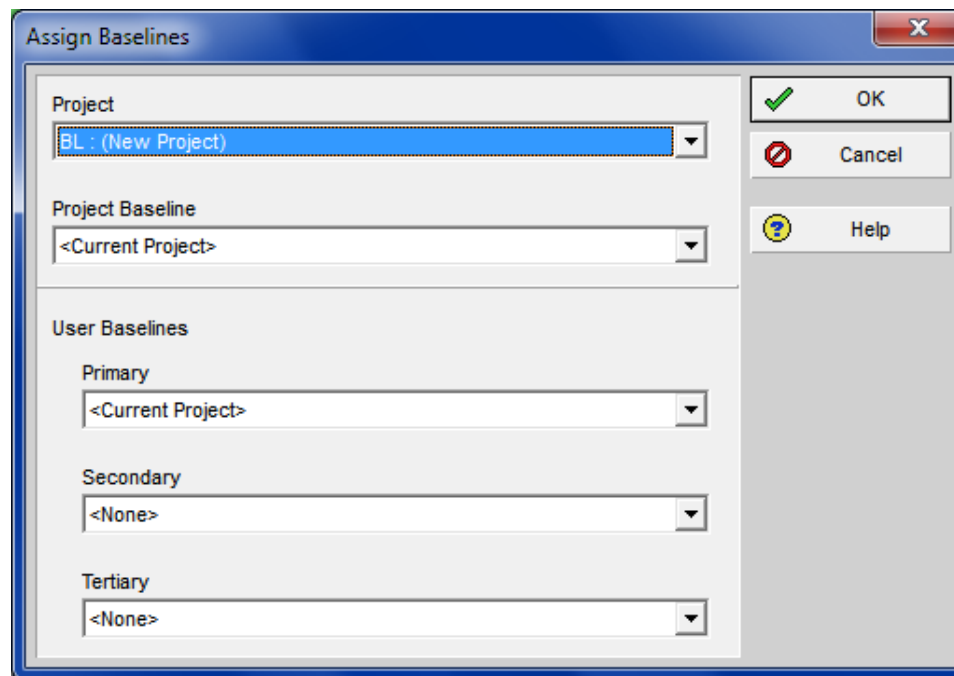
Resetting Planned Dates to Start and Finish Dates with a Global Change

- Some people (who have discovered the Planned Dates and Baseline display issues) change the Planned Dates to equal the Start and Finish Dates using a Global Change,
- This does not provide an acceptable solution as then:
 - The % Duration is no longer is calculated as intended, and
 - The scheduler has to remember to execute the Global Change at each update.



Project, Assign Baseline form

- When a Project or Primary User 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>

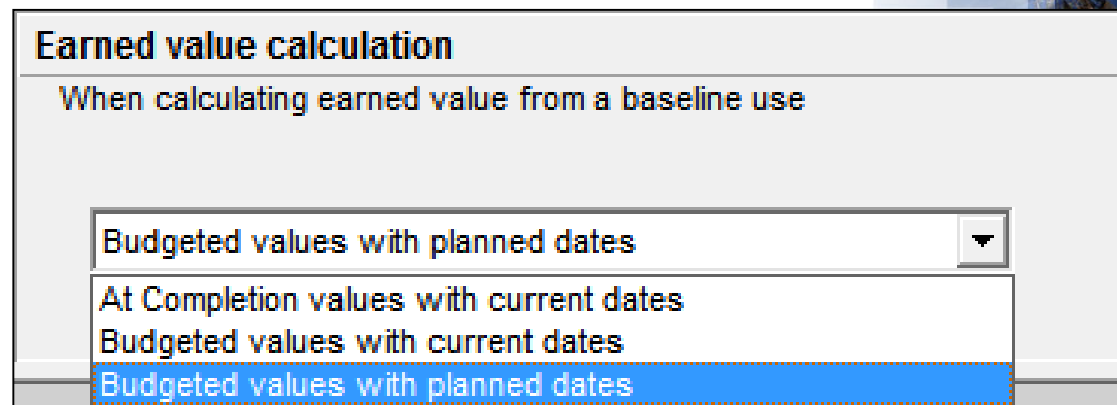
Tertiary
<None>

OK
Cancel
Help



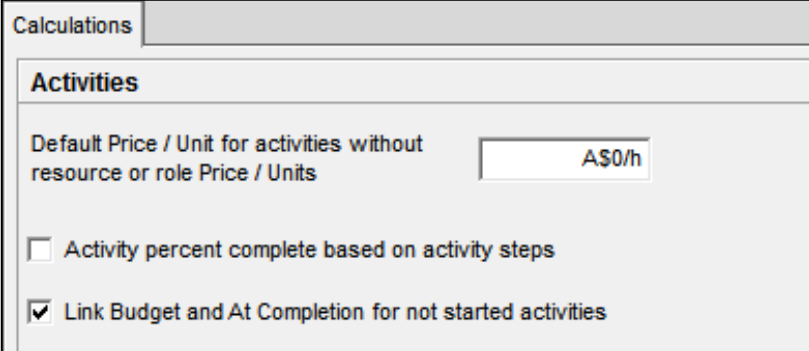
Admin Preferences, Earned Value tab

- 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 P6 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

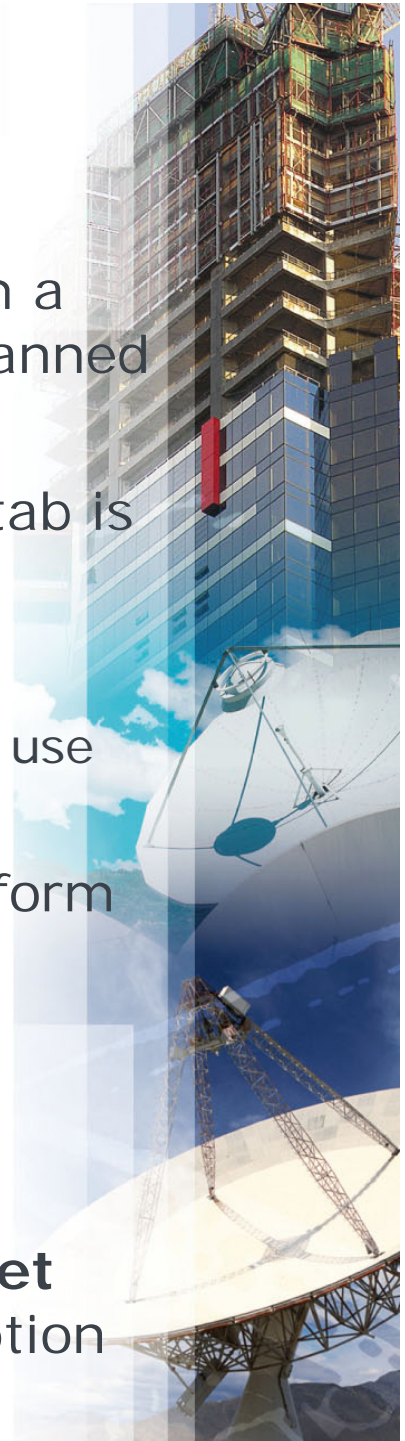
Default Price / Unit for activities without resource or role Price / Units

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** (some versions use **Planned Values with current dates**)
- A Baseline is set in the **Project, Assign Baseline** form and you are not displaying a **<Current Project>**,
- 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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