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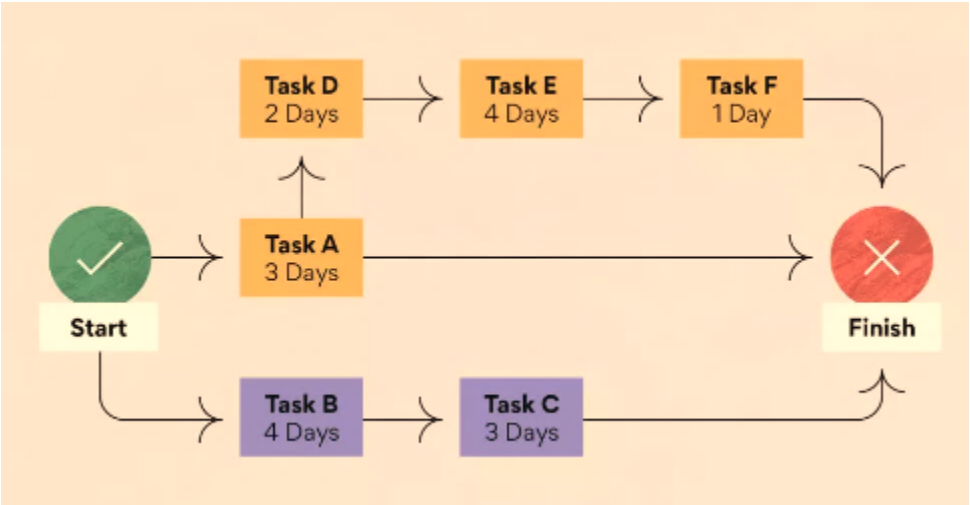
PROJECT CONTROLS

Creating CPM Schedules with Primavera P6

Tips for naming activities, activity codes, and other elements

(Proper definitions/dictionary/naming conventions)

CPM Schedules



The critical path method is the technique where we identify critical tasks for the project completion. The longest sequence of activities must be finished on time to meet the Project completion.

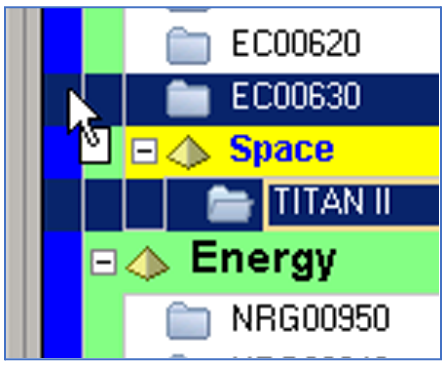
A lot of software has been developed to directly automate CPM Scheduling such as Primavera P6 and MS-Project.

If you want to know more about the Primavera P6 scheduling tool, you can check our recent article **PRIMAVERA SCHEDULING TOOL**

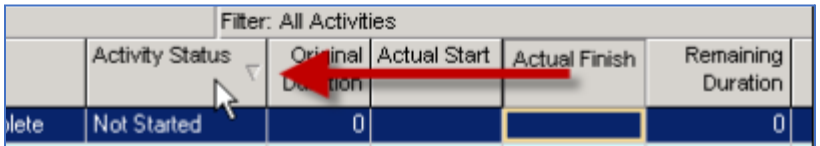
In this article, you will be able to perform more tips and tricks that will save more time in making schedules using Primavera p6, and before delving into these tricks you should be aware of the Primavera P6 data dictionary which has the definition of each element in primavera and you can easily access this through PRIMAVERA P6 Data Dictionary.

Time-saving tips and tricks in P6

- **Drag and drop to easily move information.**
  If you want to move an object from one set to another set, you can easily do this by moving the cursor in the vertical band**.**

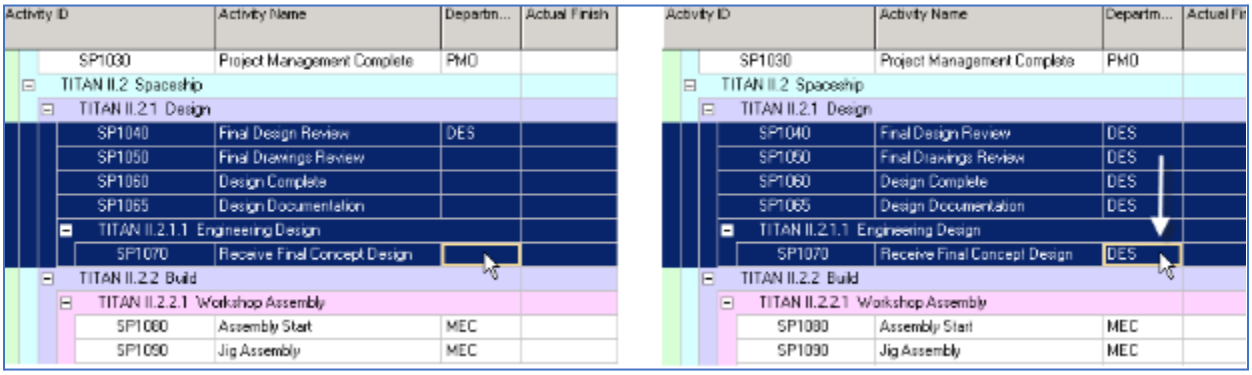


- **Column moving.**



Instead of opening columns and editing the column's location, you can easily move the column by clicking and moving it to the new position.

- **Fill down activities, dates, durations, etc**…
  If you have duplicate information, you can easily fill it down by selecting the multiplied with the Shift Key and then pressing CTRL + E to fill it down.

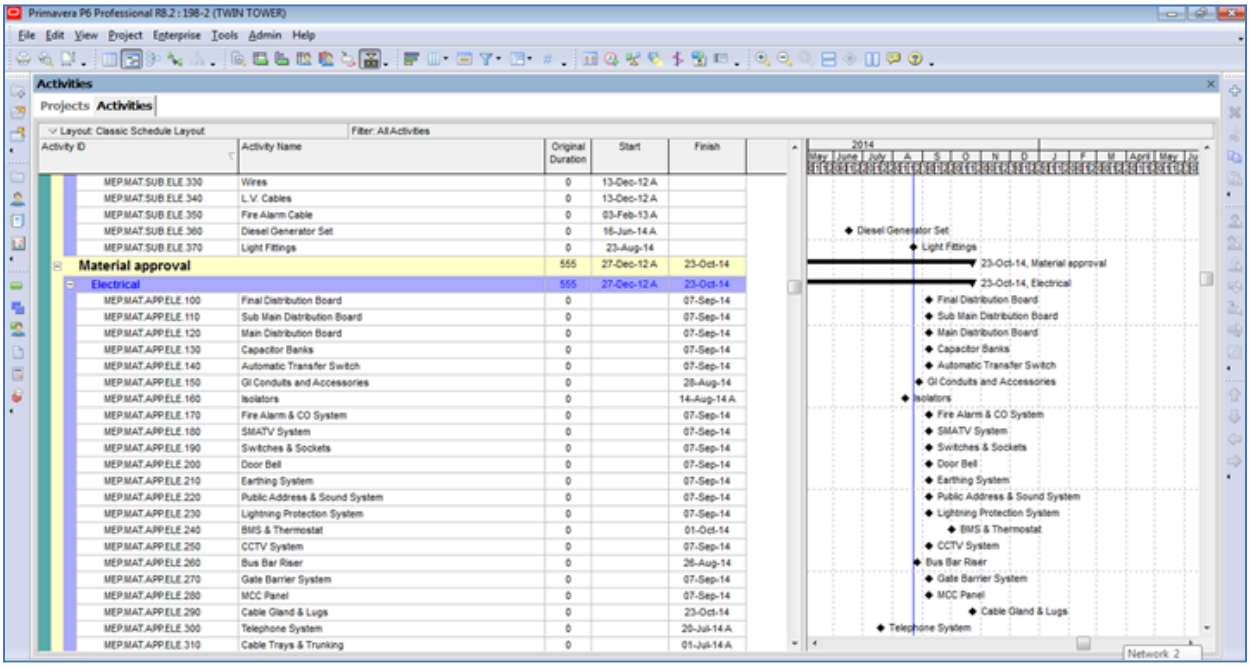


Activity Naming Conventions

Having clear and consistent activity names is essential for effective communication and understanding within project teams. Here we will discuss the importance of employing proper naming conventions for activities in Primavera P6.

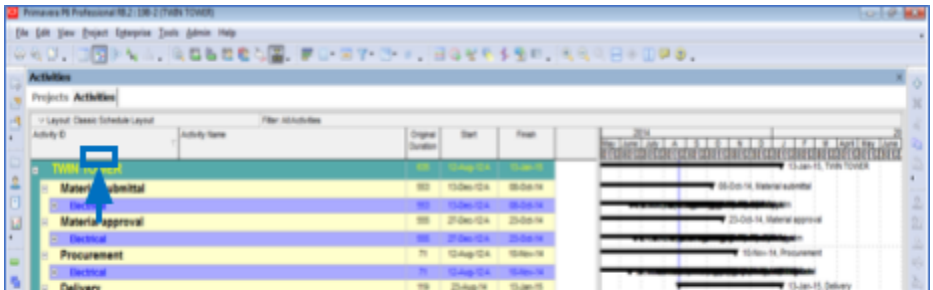
If you have a repeated sentence in many activity names, you can easily modify them all instead of editing each activity name.

- 1st step: Add all the activities that have the repeated sentence in one WBS.



Let us assume this reported sentence is related to material submissions, approvals, orders, and delivery.

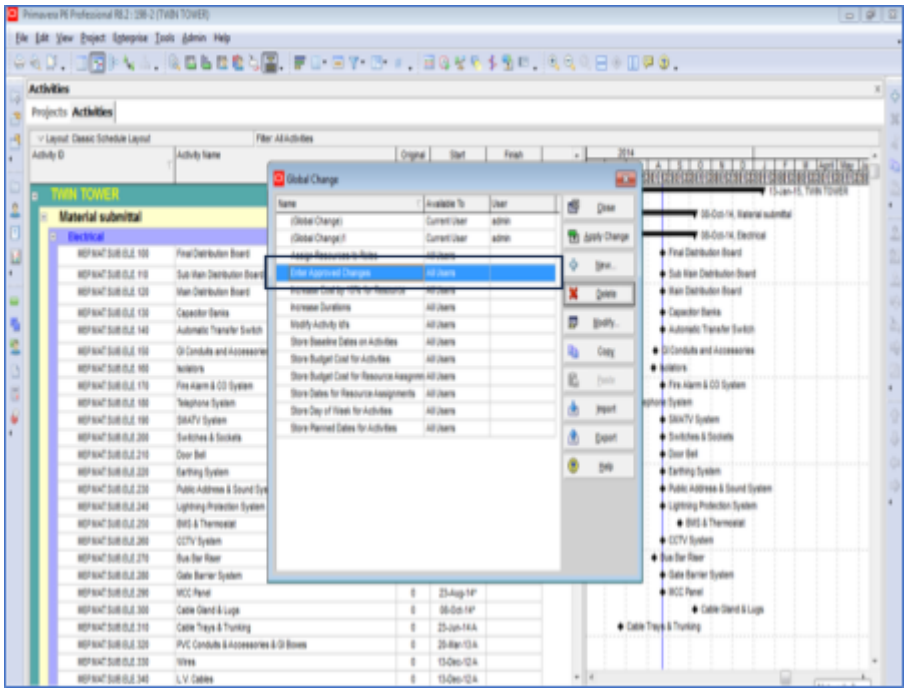
- 2nd step: in the top bar select tools, then go to global change from "Tools".
- 3rd step: after opening the global change window, create a new global

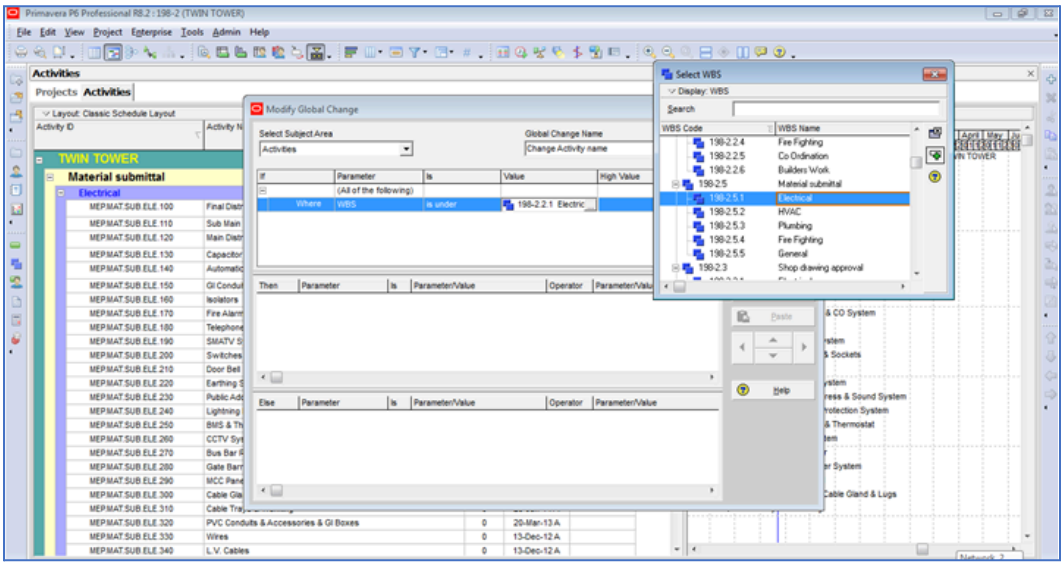


change action and as shown example name it the “Enter approved changes” action and then modify it.

- 4th step: under **<u>if</u>** respective you should clarify the following.

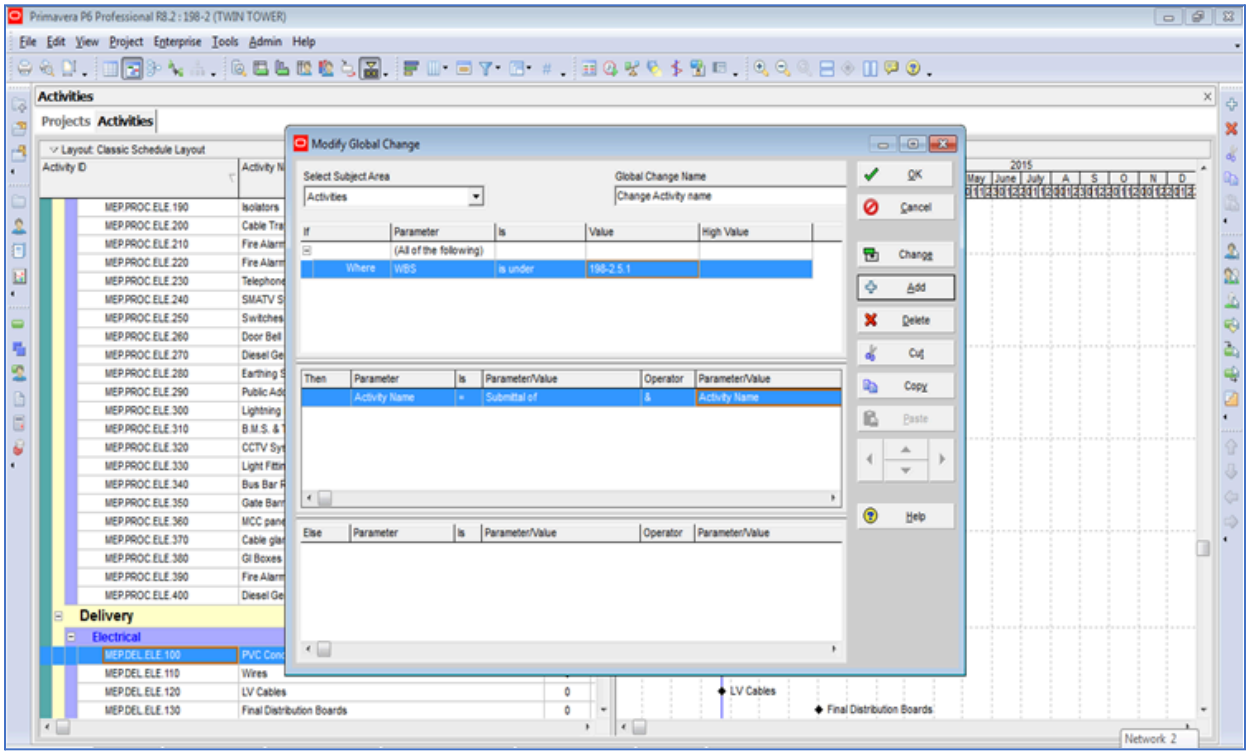
Parameter	WBS
Is	Is Under
Value	Select the value you want to change “Material submittal”





- 5th step: under **<u>Then</u>** respective you should clarify the following.

Parameter	Activity name
Is	=
Parameter Value	Select Custom then modify it to "Submittal of"
Operator	&
Parameter/ Value	Activity Name



- 6th step: leave **Else** respective empty, and then click on change.
  These will display all values after and before changing.

Activity coding tips and tricks

If you want to know more about the Activity codes explanation, you can check our article: activity codes in Primavera p6

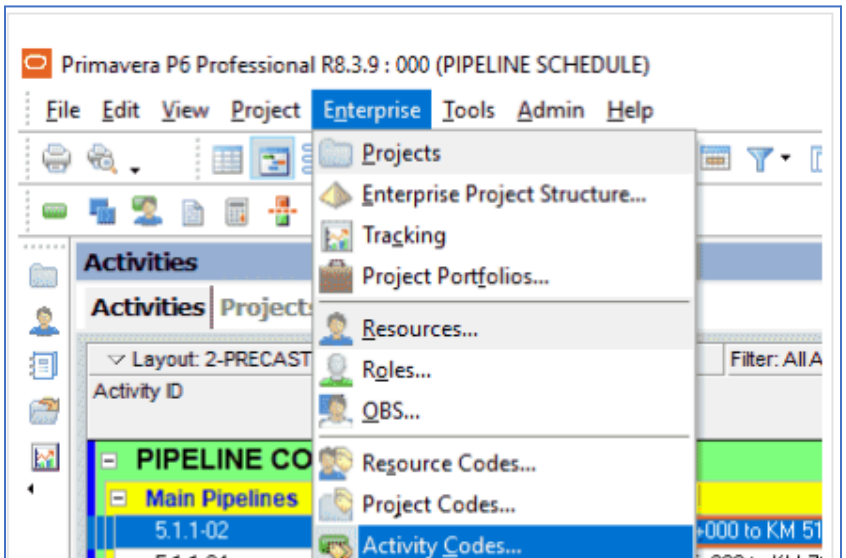
Activity codes help in filtering, grouping, sorting, and reporting activity information.

There are 3 types of activity codes.

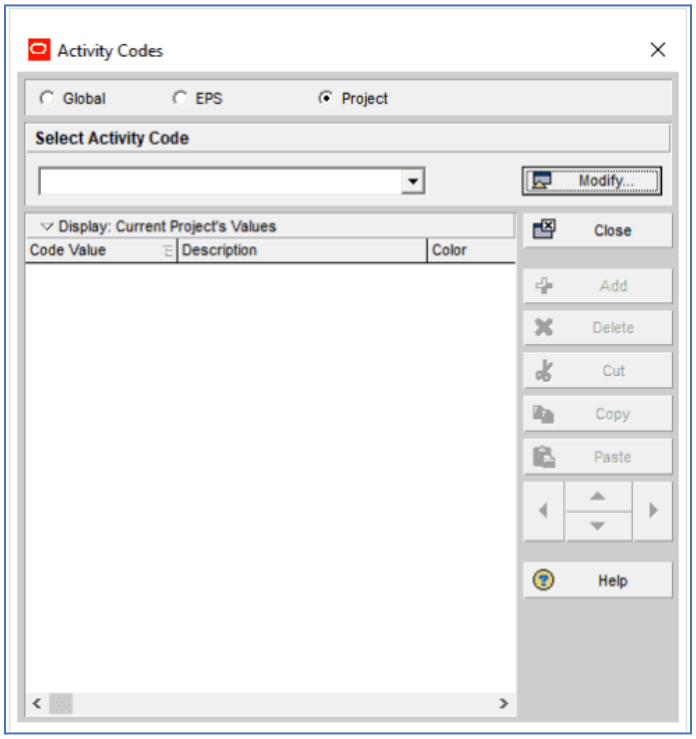
1- Global Activity Codes
2- EPS-level activity codes
3- Project-level activity codes

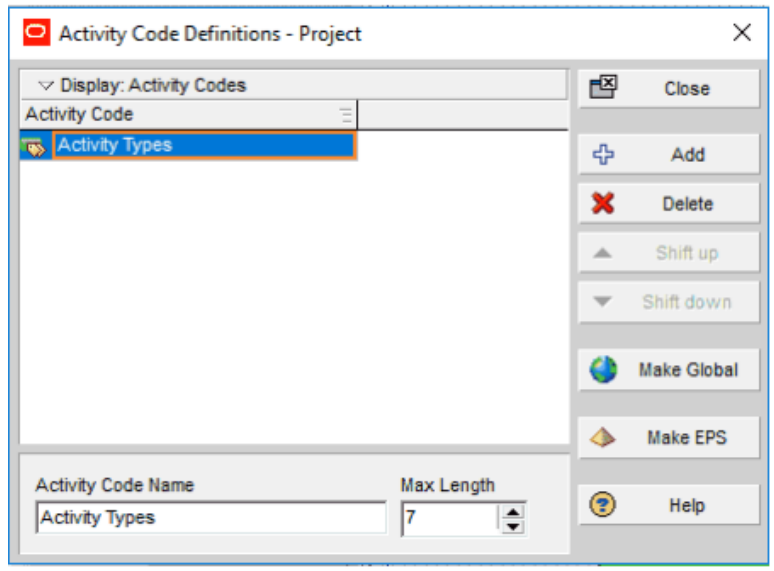
Let us take some steps to define activity codes.

- 1st step: from the top bar select enterprise then select activity codes.
- 2nd step: select the "Modify "button.

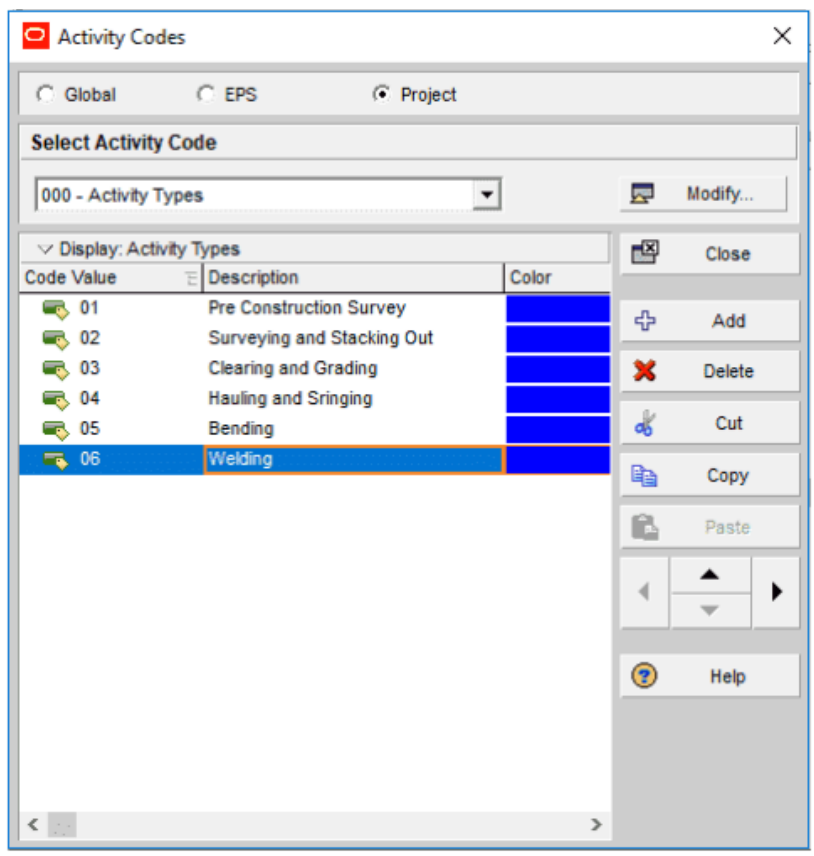


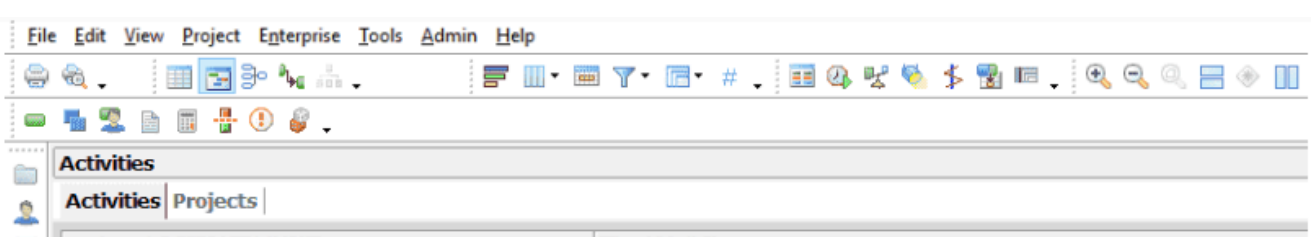
- 3rd step: Select Add in Activity Code Definitions and then add activity types for code name.





- 4th step: Select Add in the activity code window and then add all the activity types.
- 5th step: assign all the activity types to each activity.
  But you can easily drag the activity codes down for the activities that would have the same activity codes to accelerate the process.





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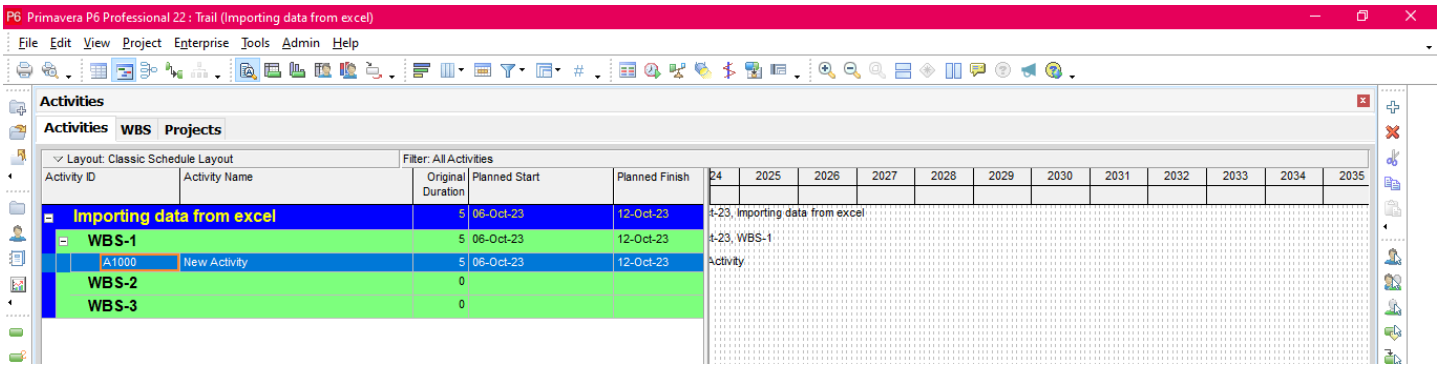
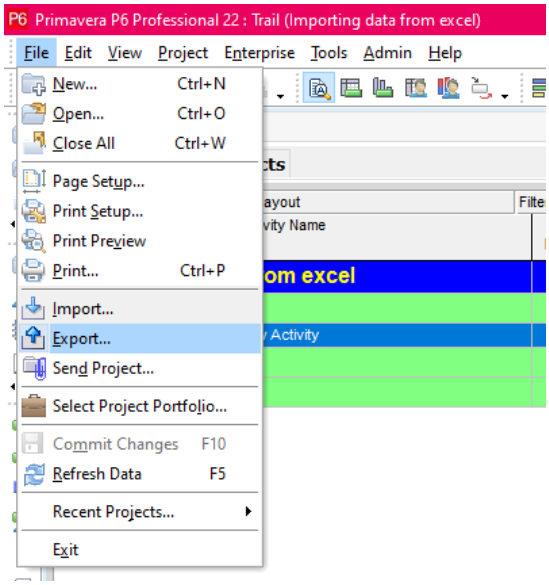
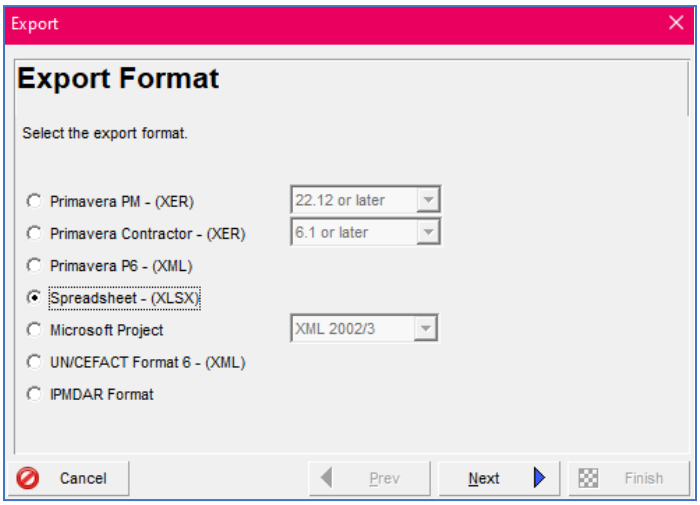
Bonus Tip

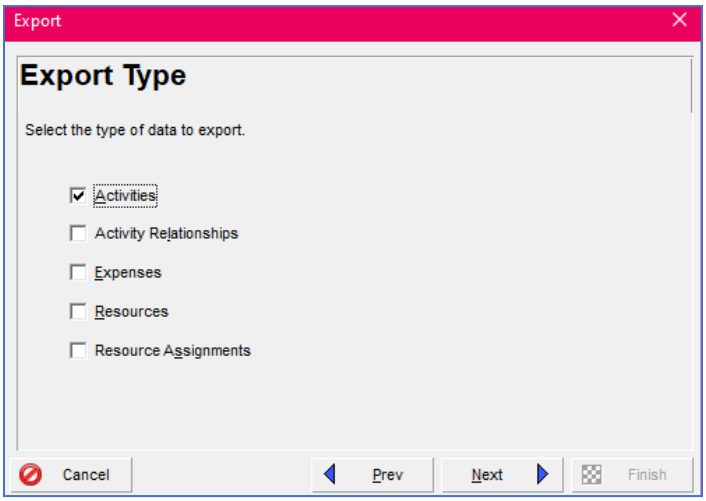
To change activity names, activity IDs, Codes, Durations, resources, etc.… by exporting and importing using Excel:



- 1st step: go to files in the toolbar.
- 2nd step: select export.
- 3rd step: Select Spreadsheet – (XLSX) format.
- 4th step: Select type of data = Activities, then check export.

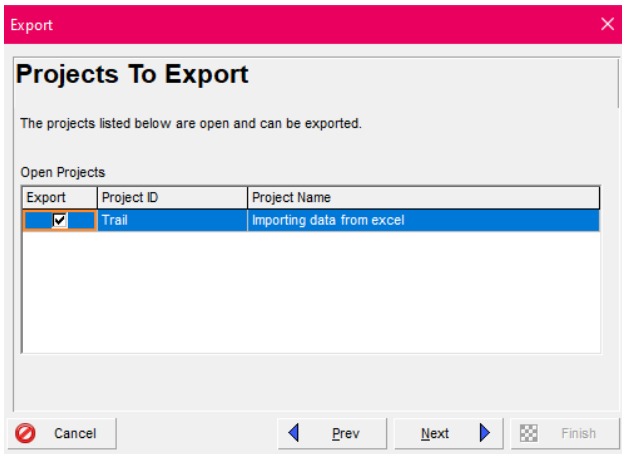


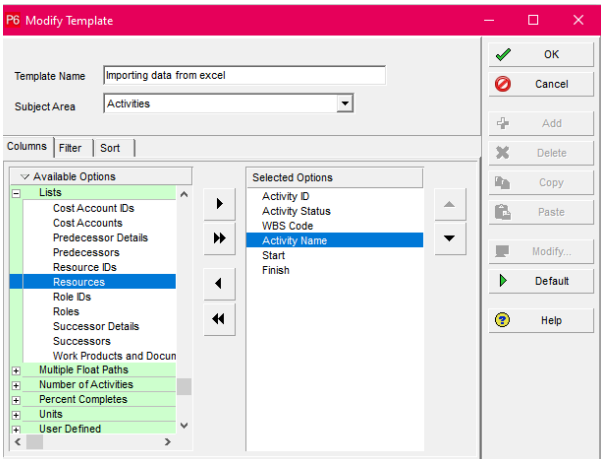


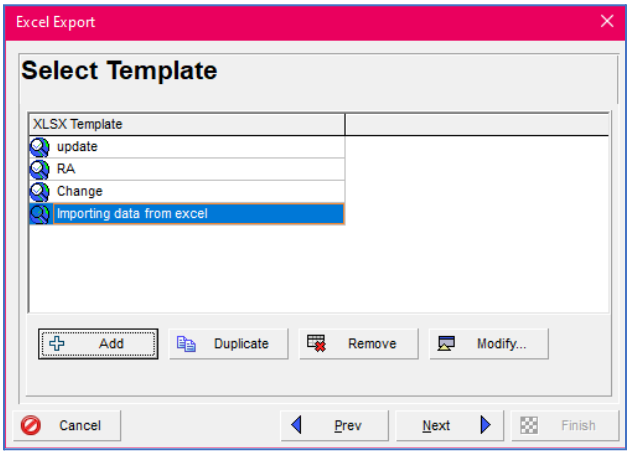


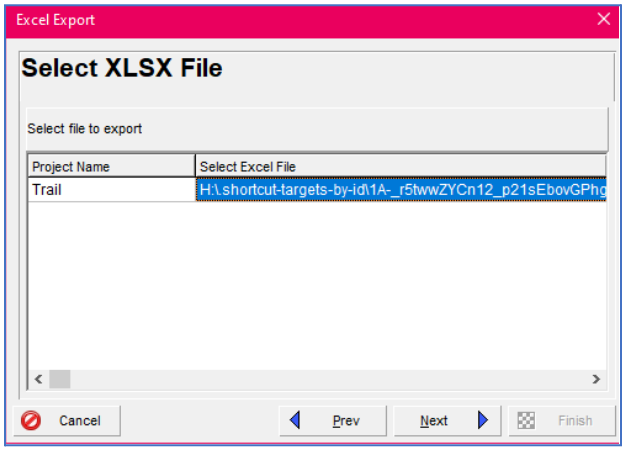
- 5th step: add a template to export, rename template to be activities import.

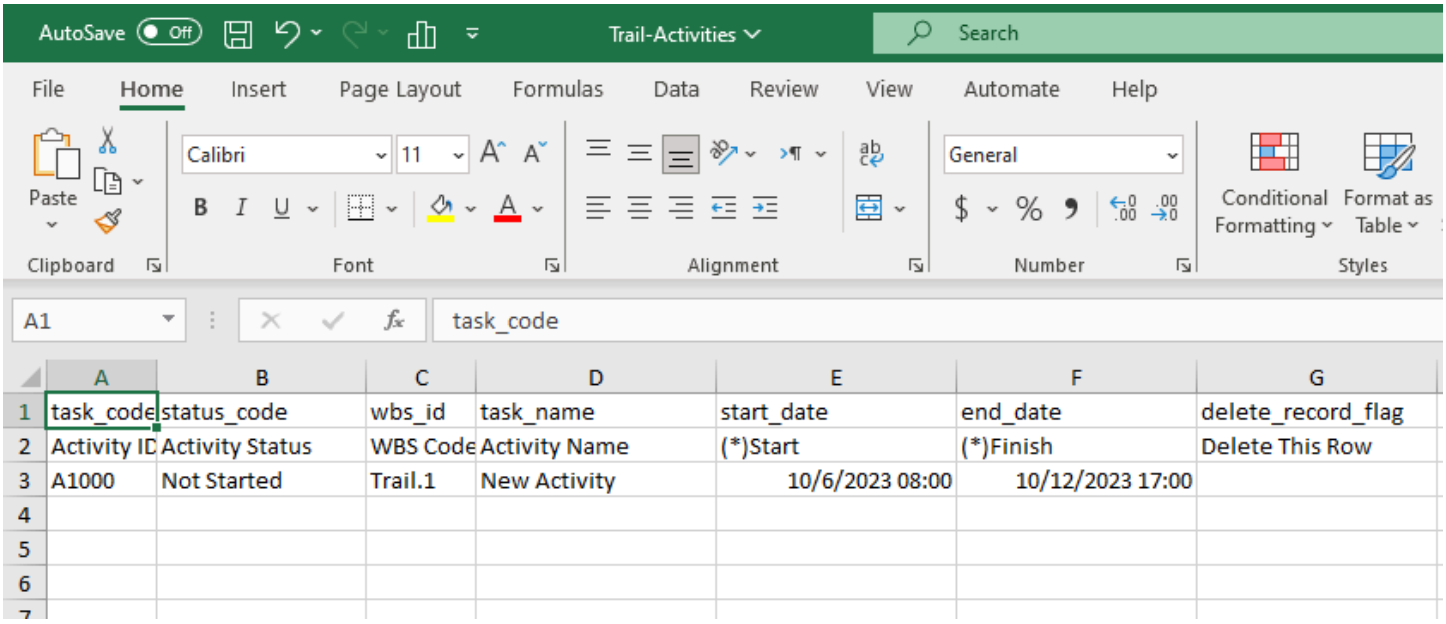
- 6th step: select file location, and then finalize exporting the Excel file.







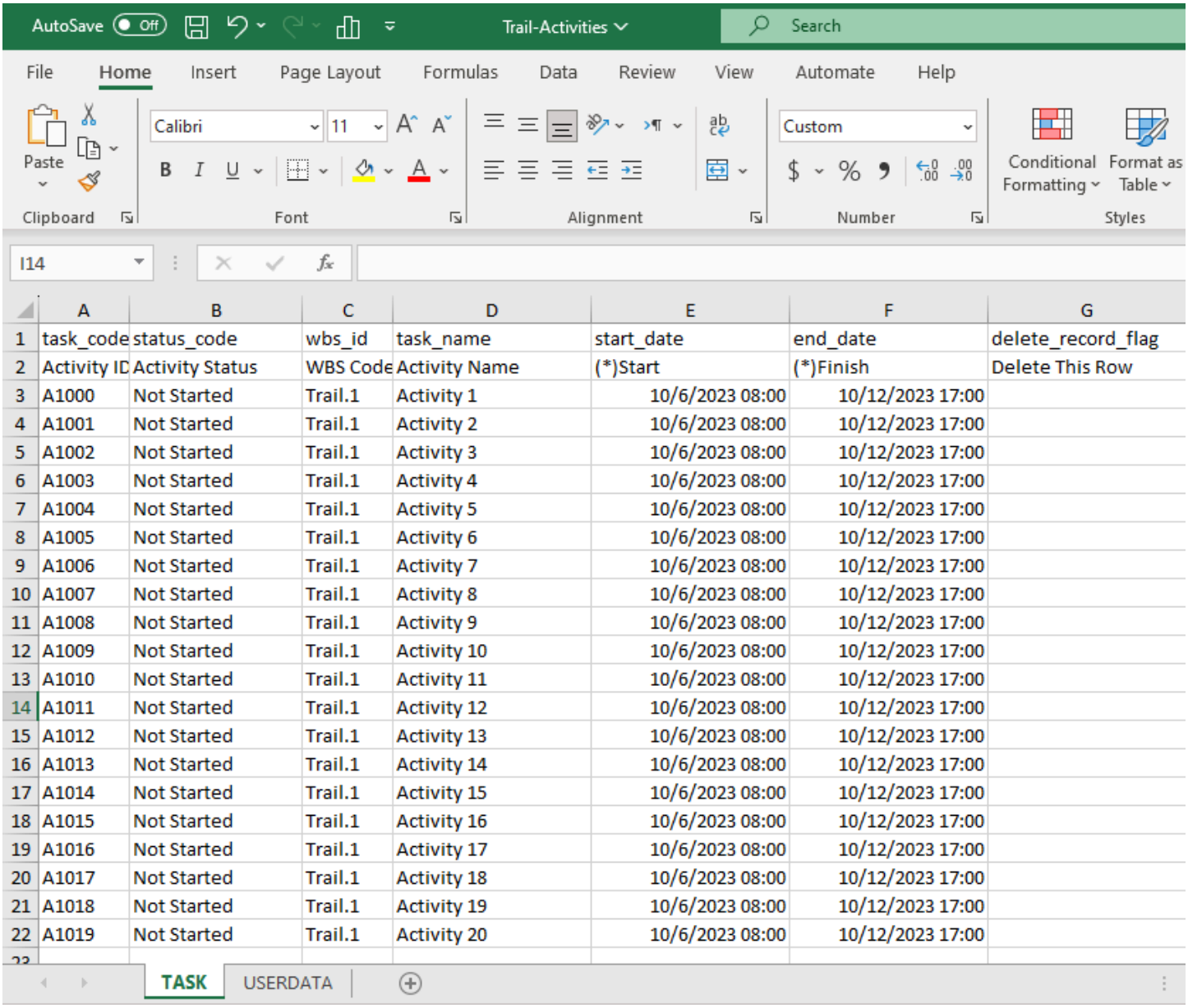




	A	B	C	D	E	F	G
1	task_code	status_code	wbs_id	task_name	start_date	end_date	delete_record_flag
2	Activity ID	Activity Status	WBS Code	Activity Name	(*)Start	(*)Finish	Delete This Row
3	A1000	Not Started	Trail.1	New Activity	10/6/2023 08:00	10/12/2023 17:00	
4							
5							
6							

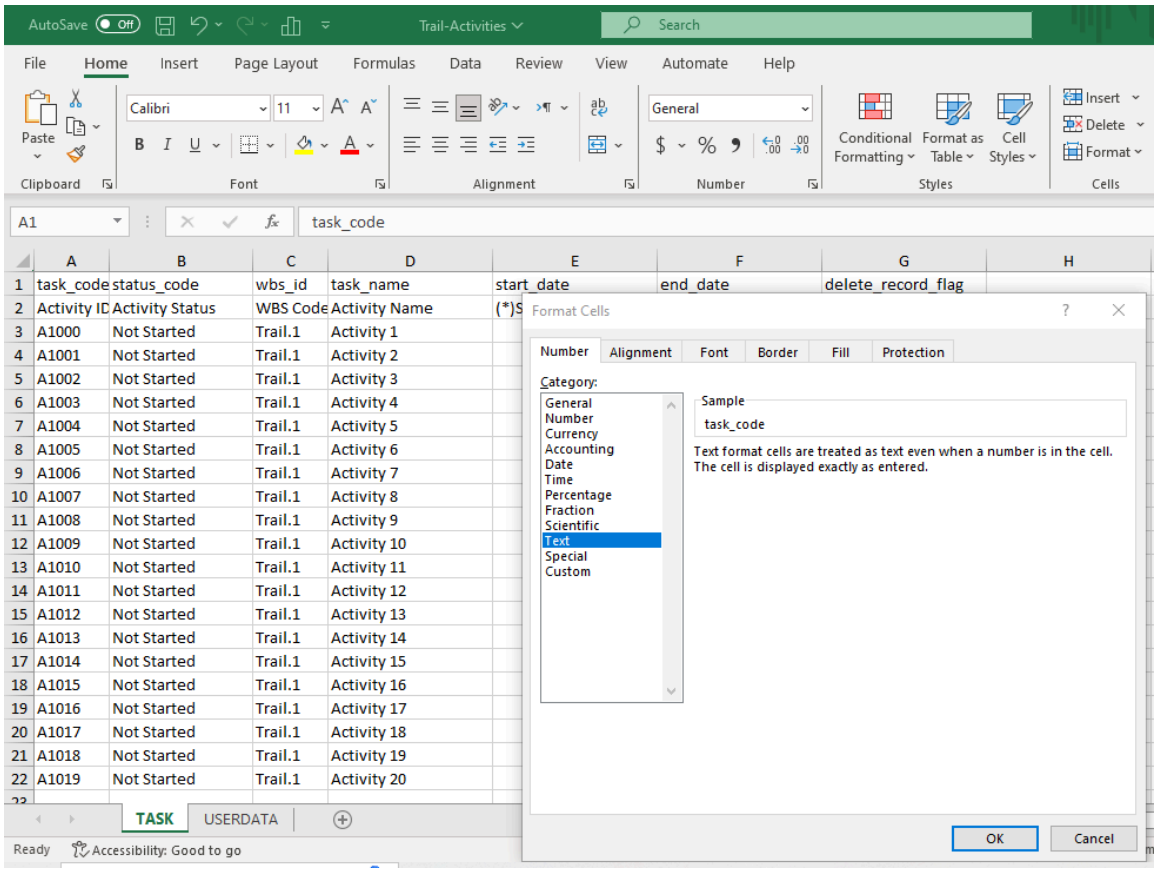
- 7th step: start editing data in the Excel file.

- 8th step: you need to make sure that all the values have the text format to prevent any wrong values.



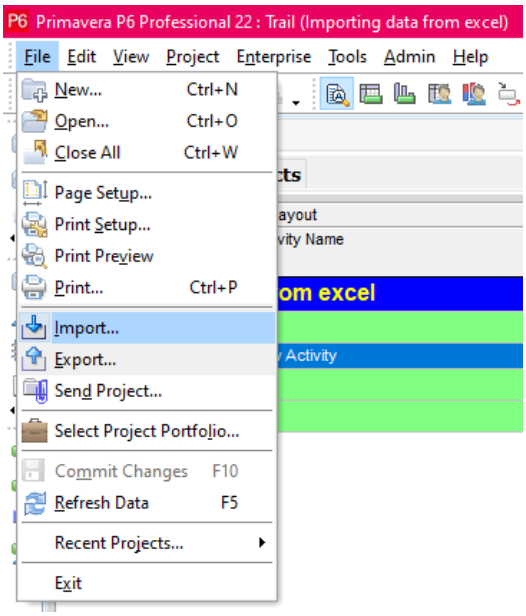
	A	B	C	D	E	F	G
1	task_code	status_code	wbs_id	task_name	start_date	end_date	delete_record_flag
2	Activity ID	Activity Status	WBS Code	Activity Name	(*)Start	(*)Finish	Delete This Row
3	A1000	Not Started	Trail.1	Activity 1	10/6/2023 08:00	10/12/2023 17:00	
4	A1001	Not Started	Trail.1	Activity 2	10/6/2023 08:00	10/12/2023 17:00	
5	A1002	Not Started	Trail.1	Activity 3	10/6/2023 08:00	10/12/2023 17:00	
6	A1003	Not Started	Trail.1	Activity 4	10/6/2023 08:00	10/12/2023 17:00	
7	A1004	Not Started	Trail.1	Activity 5	10/6/2023 08:00	10/12/2023 17:00	
8	A1005	Not Started	Trail.1	Activity 6	10/6/2023 08:00	10/12/2023 17:00	
9	A1006	Not Started	Trail.1	Activity 7	10/6/2023 08:00	10/12/2023 17:00	
10	A1007	Not Started	Trail.1	Activity 8	10/6/2023 08:00	10/12/2023 17:00	
11	A1008	Not Started	Trail.1	Activity 9	10/6/2023 08:00	10/12/2023 17:00	
12	A1009	Not Started	Trail.1	Activity 10	10/6/2023 08:00	10/12/2023 17:00	
13	A1010	Not Started	Trail.1	Activity 11	10/6/2023 08:00	10/12/2023 17:00	
14	A1011	Not Started	Trail.1	Activity 12	10/6/2023 08:00	10/12/2023 17:00	
15	A1012	Not Started	Trail.1	Activity 13	10/6/2023 08:00	10/12/2023 17:00	
16	A1013	Not Started	Trail.1	Activity 14	10/6/2023 08:00	10/12/2023 17:00	
17	A1014	Not Started	Trail.1	Activity 15	10/6/2023 08:00	10/12/2023 17:00	
18	A1015	Not Started	Trail.1	Activity 16	10/6/2023 08:00	10/12/2023 17:00	
19	A1016	Not Started	Trail.1	Activity 17	10/6/2023 08:00	10/12/2023 17:00	
20	A1017	Not Started	Trail.1	Activity 18	10/6/2023 08:00	10/12/2023 17:00	
21	A1018	Not Started	Trail.1	Activity 19	10/6/2023 08:00	10/12/2023 17:00	
22	A1019	Not Started	Trail.1	Activity 20	10/6/2023 08:00	10/12/2023 17:00	

- 9th step: fill down all your data and then save this file CTRL+S.



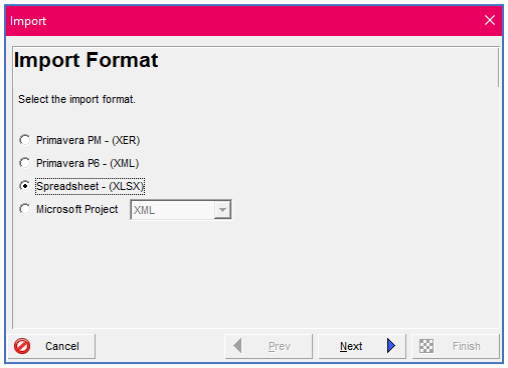
- 10th step: import the saved file to Primavera p6.

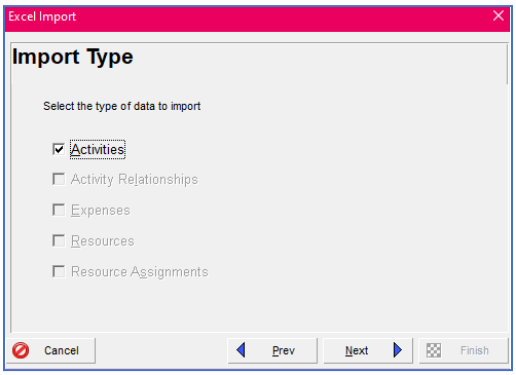
- 11th step: select spreadsheet – (XLSX) Format.

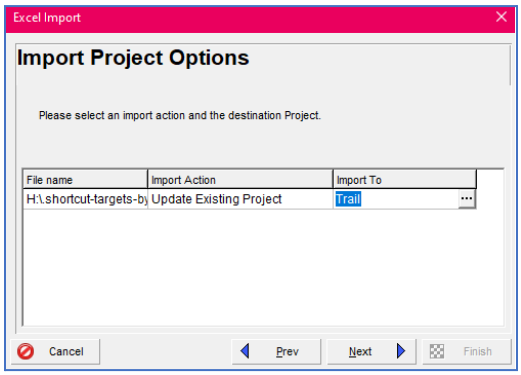


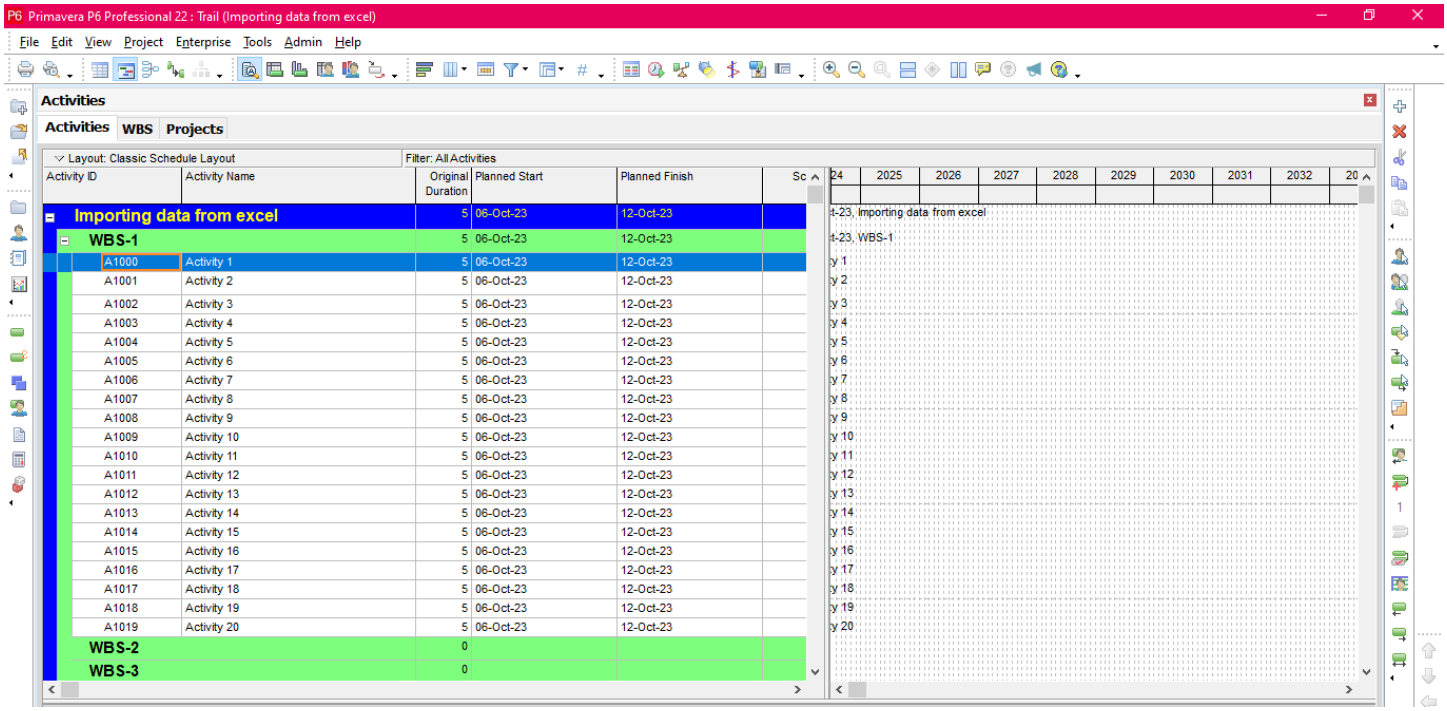
- 12th step: select the project.

- 13th step: finally, you will see all the imported data.









Conclusion

In conclusion, creating CPM schedules with Primavera P6 requires careful attention to naming activities, activity codes, and other elements. By following the tips and best practices outlined in this article, project control professionals can enhance communication, improve organization, and streamline data analysis within their projects. Leveraging the features and capabilities of Primavera P6, combined with proper naming conventions, contributes to successful project management and control.