Updating Project Status in Primavera P6
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This lesson will cover some very key topics for inputting status information into your project plan. I will show you some tools to help with inputting status, update a few activities with actuals and finally we will look at the results.

The process of statusing your project is essentially the process of gathering information about what actually happened for a period in the life of the project and inputting that information into your project plan. We do this, so we can compare what actually happened to what we planned that will happen and then decide if we need to make adjustment to our project plan. All of the processes just described belong to the Execution Stage of a project. In the Execution stage, we actually perform the work outlined in the plan and evaluate it as we progress.

As usual, we will be updating status in our MFE project, shown here. A common question I always have to answer with regards to updating status is; how often do we update? The frequency of your status updates depend on factors such as; the duration of your project or the type of project you are running. Many project managers choose to update their projects every week. Once you decide how often to update your plan, a P6 tool called the Progress Spotlight will help you to make statusing of each period easy.
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You can turn on the Progress Spotlight by clicking the spotlight button on your toolbar. Click the **spotlight button** on the toolbar.

The **progress spotlight** is a great tool to help you determine which activities will need to be updated with status information. Here’s how it works. Let’s say you update your project with status information every week on Friday. Before you enter the information into your project plan for the past week, you will activate the **Progress Spotlight**. On the Gantt chart, the spotlight highlights the past week in yellow. In the Activity List, the activities starting or in progress during that week are highlighted in yellow as well. The activities currently highlighted represent the activities we will need to update with status information for work that occurred in the past week. The other activities you wont need to worry about since they are scheduled for future weeks.

Incase you would like to update activities every **month** instead of updating every week or every day. You can make the spotlight bigger or smaller to highlight any period. By default, the spotlight highlights 1 week. But the size of the spotlight can be adjusted by simply grabbing the right edge of the spotlight with your mouse and dragging it to the right or left. When you do so, you will also see a change in the highlighted activities on the activity list. In this lesson, I will want to highlight an entire month. **Would you like to see a demo?**
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Unfortunately you will have to try this yourself with the real P6 software. Did you notice that as the spotlight expanded one more activity was highlighted in the activity list? These activities that are highlighted have either started or they are already in progress for the spotlighted month. So the highlighted activities are the ones that will require updating. Let’s try updating some of these activities with actuals or status information. Click on Activity A1000 to select it.

We will now begin to input status information against activities. Remember, we will be indicating what actually happened for each activity – what dates the activity actually started and finished on, the actual duration and how many labour hours were actually achieved. As usual Primavera offers you lots of different ways to accomplish this task, but I will be showing you the most common methods.

We will be doing most of our work on the Status tab, shown in the bottom half of your screen. Now notice that activity A1000 is a Start Milestone. We will assume that A1000 started as planned, on 02-May. To indicate this, we will check the Started checkbox, next to the start date of 02-May-2014.
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A few items to note. When you marked Start Milestone as Started, it was automatically marked Finished. Remember that milestones have no duration, they are like checkpoints. When you marked A1000 as Started, it means you crossed the checkpoint. Also notice that the Duration% was automatically changed to 100%, meaning the activity is 100% complete. Updating is pretty easy. Let’s do another activity. Click on the down arrow to select the next activity in the list.

Now we are working with the next activity, A1010, which has a Task Dependent activity type. Note the activity’s duration, start, and finish dates. Now let’s say this activity started 3 day later than planned. Let’s find out how to status this activity. Click the calendar button and select 5-May. Click Select.

Very good. Now have a peak at A1010’s bar on the Gantt chart. Did you notice that it has shifted to the right as a result of the status information you just entered? Now we will set the actual finish date. Select May 14, 2014. This time we will accept that the activity finished on 15-May. Place a checkmark in the Finish checkbox to accept 15-May-2014 as the finish date.
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There are a few more items to notice. First, on your Gantt chart, the activity’s bar has turned **blue**. Blue bars represent completed activities or those in progress. Next, on the status tab, notice the **Duration %** is now 100%... also notice **Actual** field in the **Duration** category has been populated with 10 days. Click on the **Resources Tab**.

On the **Resources Tab**, you will notice that actuals information relating resource hours is tracked here as well. The **Actual Regular Units** has been automatically populated with 120 hours, the hours that were originally budgeted. Please note that you can edit the Actual Regular Units in case additional or fewer hours were actually worked. In this case, 55 hours translated into an **Actual Cost** of $3,206.18. Click on the **Status Tab**.

Ok, it is time for the next activity. Click the **down arrow** to move to the next activity.

Now we are working with activity A1070, another Task Dependent activity. For this activity, you will mark it as started. Place a checkmark in the **Started checkbox**.

Good. Let’s say this activity completed early. Note the planned finish of 15-May. Let’s say it actually finished on 13-May.

Please Note: the process of inputting an actual **finish** date is slightly different from inputting an actual **start** date. First, we will input the actual date, **then** we will
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mark it finished. This is the reverse procedure we followed for inputting an actual start date. Ok, let’s try it. Click on the calendar button to change the Finish date.

Select 13-May on the calendar and Click the select button to luck in the date.

Place a checkmark in the Finished checkbox.

Excellent! Once again, notice the bar for activity on the Gantt chart is showing the activity finished earlier than planned. also notice Actual field in the Duration category has been populated with 8 rather than the 10days that was planned. Click on the Expenses tab.

It turns out that activity A1070 has an expense entered against it. The expense is Fence rental. We created this resource in one of our previous lessons. Expenses can also be updated with actual cost information. Here, we can see that the Bugeted Cost of the Fence was $630. You will enter the actual cost of the Fence. First, click in the Actual Cost Field.

Let’s say it actually cost $799. Type “799” in the Actual Cost Field and press ENTER.

You can see that updating actuals in your project can also be related to updating actual costs. Updating actual costs will help you to recognize if your project’s budget is on track.
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Now that you have updated a few activities with schedule, resources, and cost status information, there is one last step to perform. After you input your status information, you must reschedule your project for your plan to reflect the actuals. Let’s do it. Click on the Schedule button on your toolbar.

After inputting actuals into your project plan and before rescheduling the project, there is a middle step to complete and that involves the Data Date. The data date defines where you currently are in the execution of your project plan. Remember our progress spotlight? Remember we expanded it to stretch from the beginning of our project until 1st of June? that means that we have executed all of the activities in our plan up to 1st of June. Thus, you will now move your project’s Data Date to 1-June.

We can do that right here in the schedule window. Click the calendar button in the Data Date field.

Click the right arrow to advance the calendar to June.

Click to select 1-June

Click the select button to luck in your date.

Good work! You are now ready to reschedule. Go ahead. Click the Schedule button.
Let’s look at your result using the Gantt chart. To begin, the blue vertical line represents your **data date**. Activities to left of the blue line are completed and show up as blue. Activities to the right remain green since they are in progress or not yet started.

Also notice activities A1090, B1100, and B1110. These activities should have started in January, according to the baseline bars for each. Since no actual dates were inputted for them, P6 assumes that they have not yet started and the scheduling process scheduled them to start as soon as possible in June. That is why their bars were pushed just after the blue data date line.