



The 5 Minute Update

How to Progress your Primavera Schedule in 8 Easy Steps

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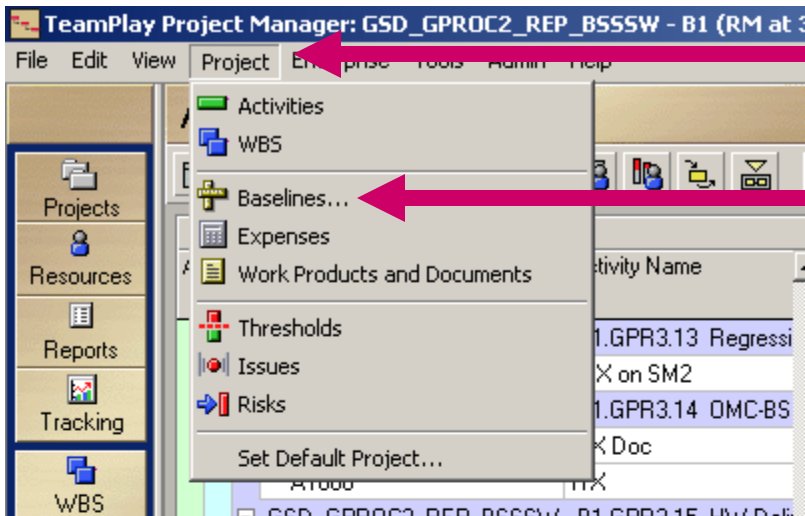
5 Minute Update

This presentation will illustrate how to update a schedule in 8 short stages.

- 1 Create a Baseline**
- 2 Switch ON auto schedule**
- 3 Ensure that Baseline Bar is switched ON**
- 4 Apply Actuals**
- 5 Move Data Date Forward**
- 6 Review IN PROGRESS activities**
 - Update Remaining Duration/Finish Dates**
- 7 Review progress of activities on Data Date**
 - Update Start Dates**
- 8 Switch OFF auto schedule**

5 Minute Update

Create a Baseline - 1

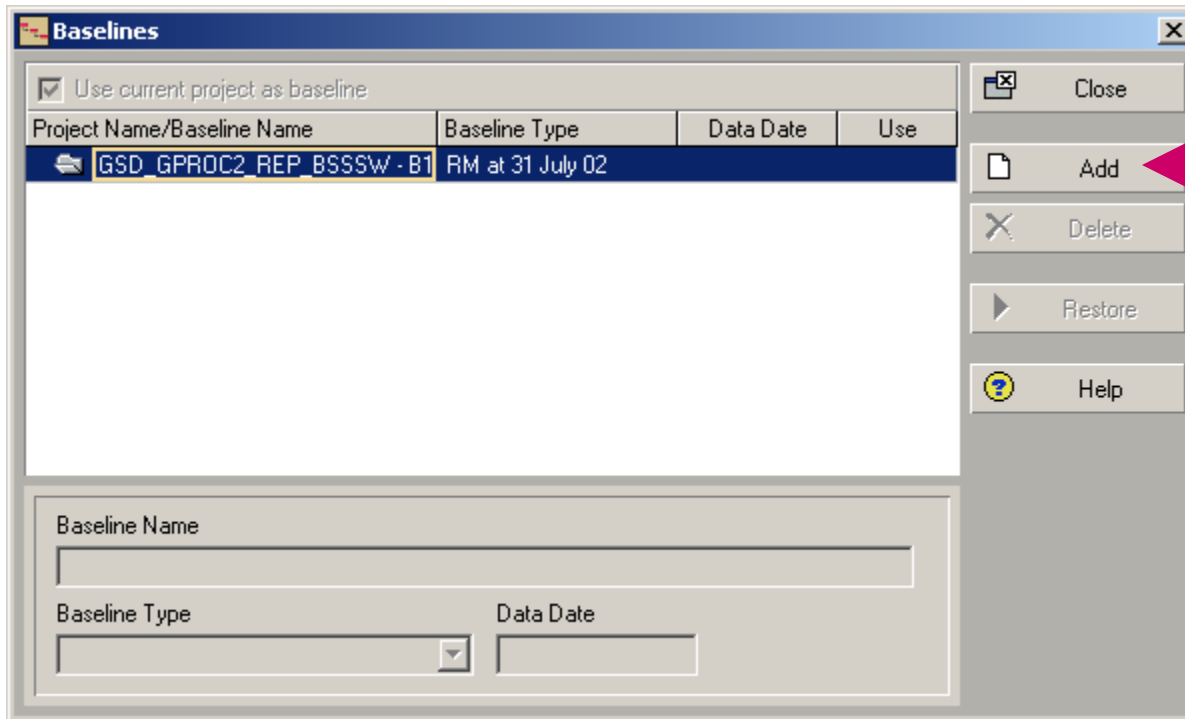


Select 'Project'

Select 'Baselines'

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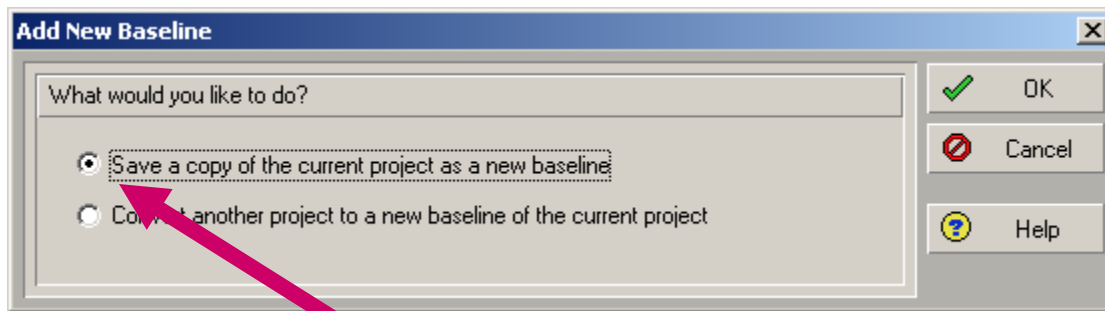
Create a Baseline - 2



Select 'Add'

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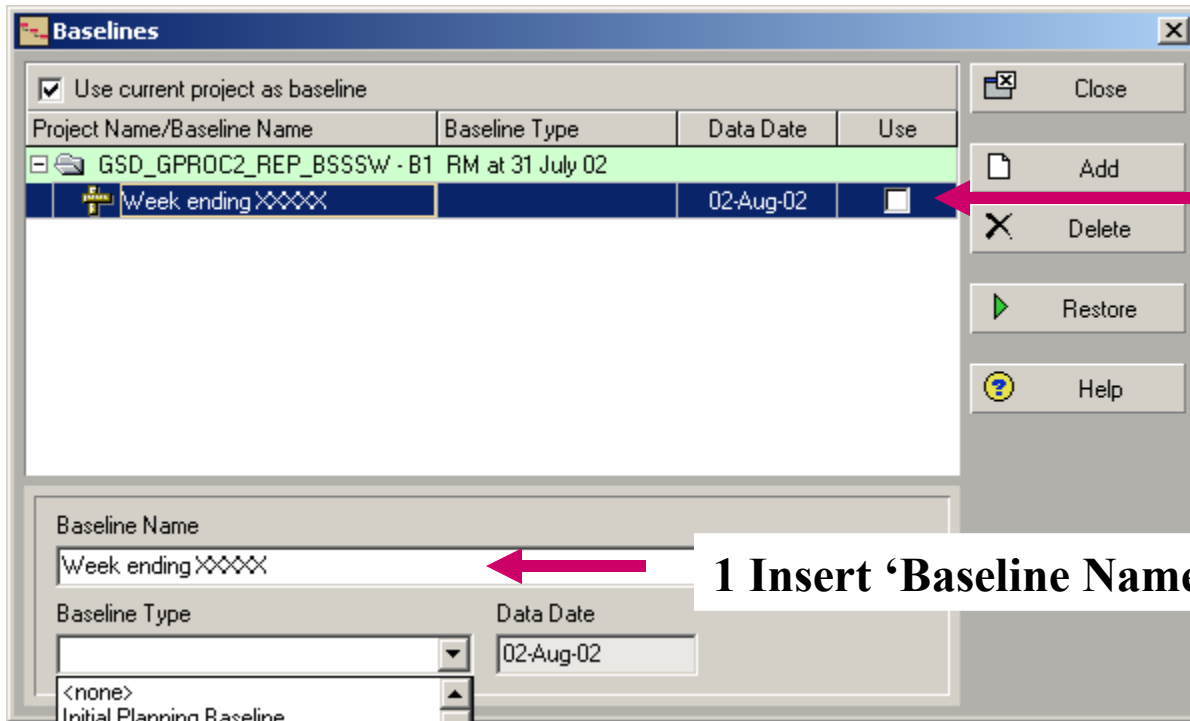
Create a Baseline - 3



Select 'Save a copy of the current Project as a baseline'

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Create a Baseline - 4



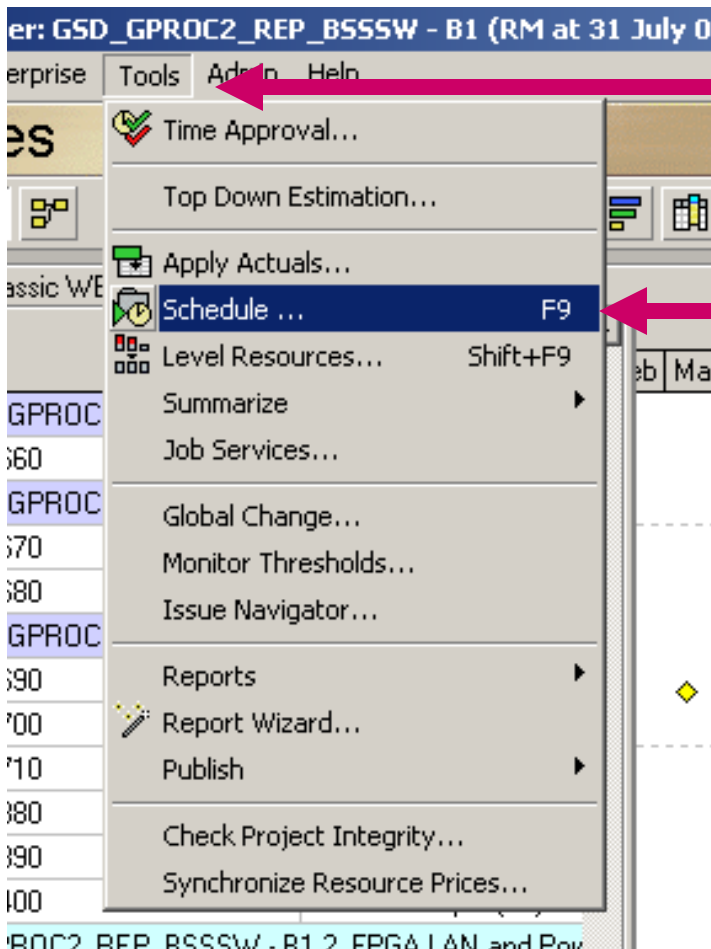
3 Select 'Use'

1 Insert 'Baseline Name'

2 Select 'Baseline Type'

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Switch ON auto schedule 1

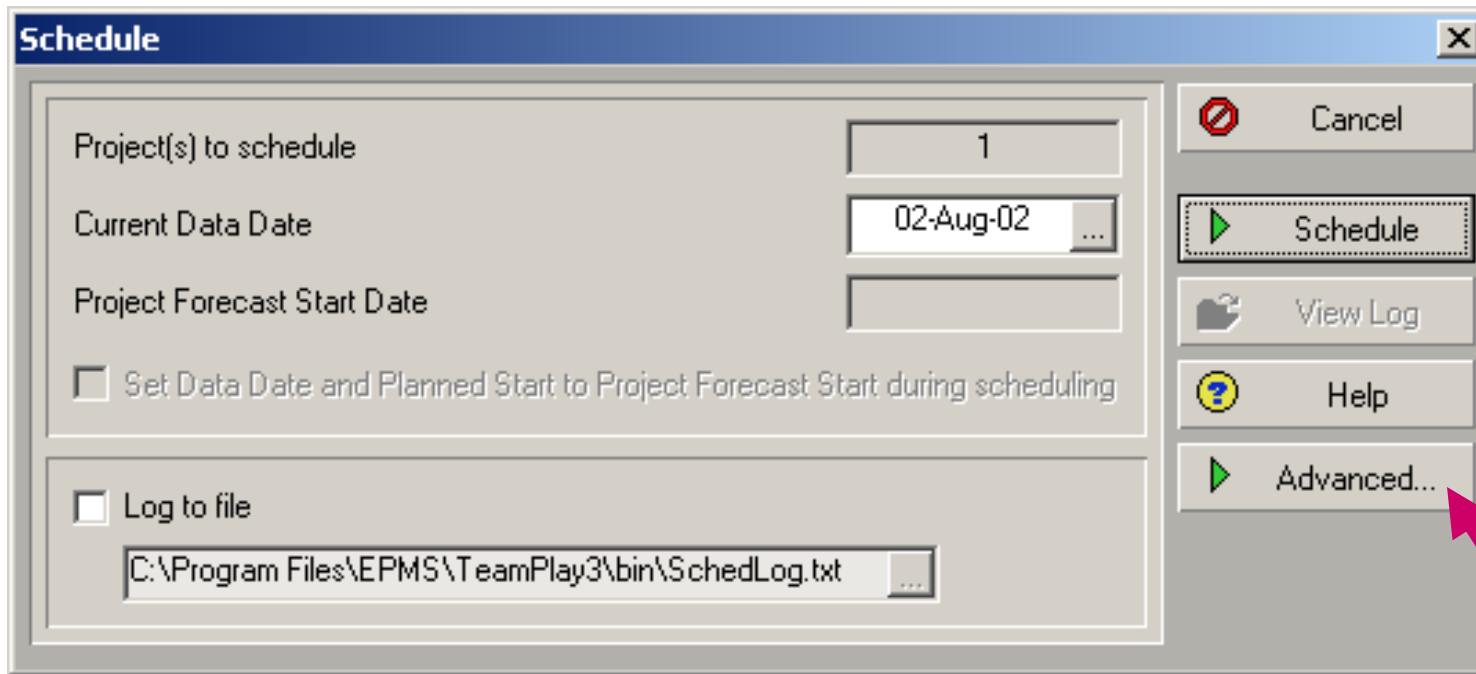


Select 'Tools'

Select 'Schedule'

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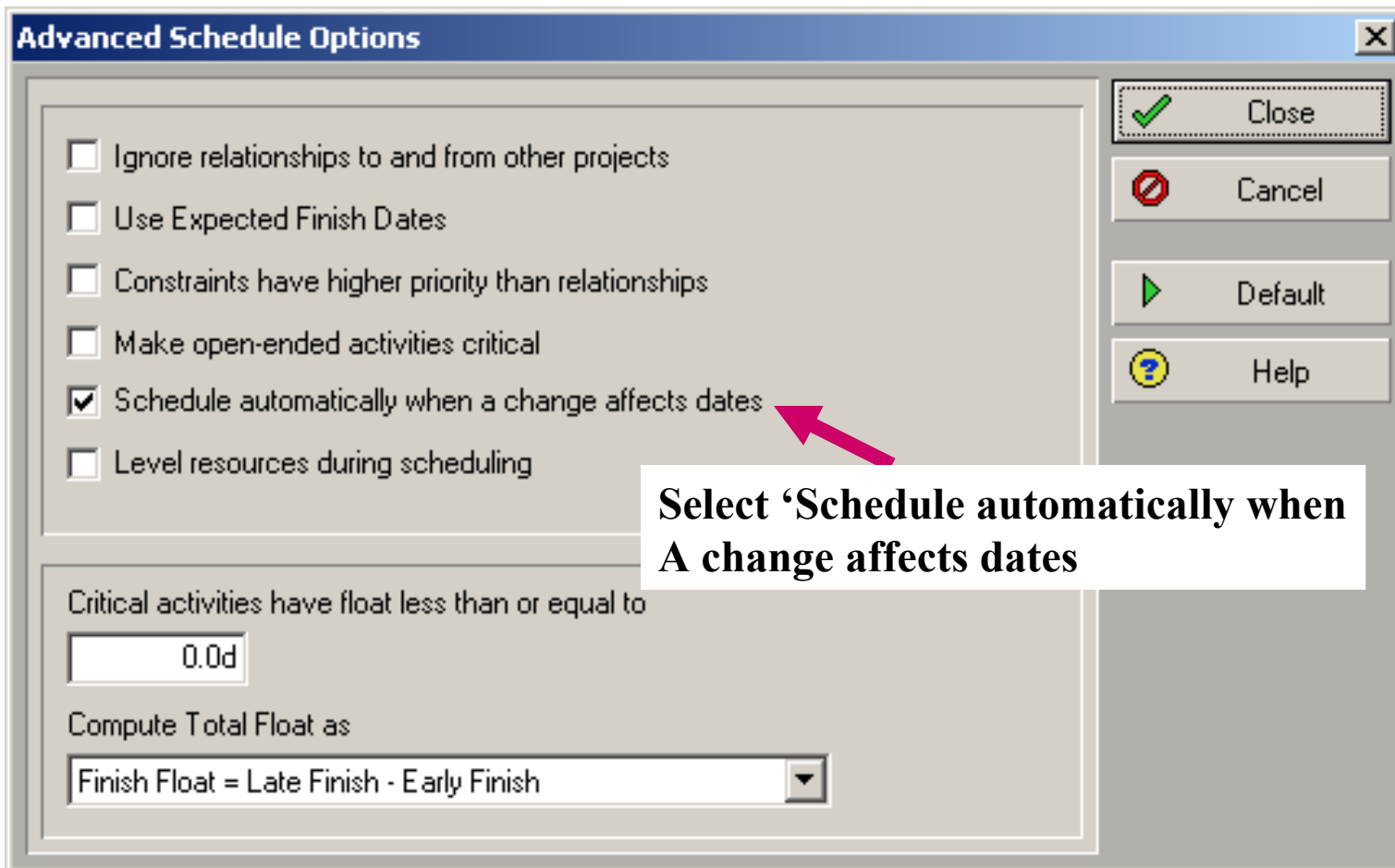
Switch ON auto schedule 2



Select 'Advanced'

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Switch ON auto schedule 3



5 Minute Update

Ensure That Baseline Bar is Switched ON Activities

Layout: Classic WBS Layout

Display	Name	Timescale	Filter	Preview
<input checked="" type="checkbox"/>	Remaining Lev...	Remain Bar	Level of Effort	
<input checked="" type="checkbox"/>	Actual Level of ...	Actual Bar	Level of Effort	
<input checked="" type="checkbox"/>	Baseline	Baseline Bar	Normal	
<input checked="" type="checkbox"/>	Actual Work	Actual Bar	Normal	
<input type="checkbox"/>	Remaining Work	Remain Bar	Normal and Non-critical	
<input type="checkbox"/>	Critical Remaini...	Remain Bar	Normal and Critical	
<input type="checkbox"/>	Start Constraint	Remain Bar	Has Start Constraint	
<input type="checkbox"/>	Finish Constrai...	Remain Bar	Has Finish Constraint	

Bar Style

Shape:

Color:

Pattern:

Options: Show when collapsed Show for Summary Bars

Row: 1

OK
Cancel
Apply
Add
Delete
Copy From..
Shift up
Shift down
Options...
Default
Help

1 Select 'bars' icon

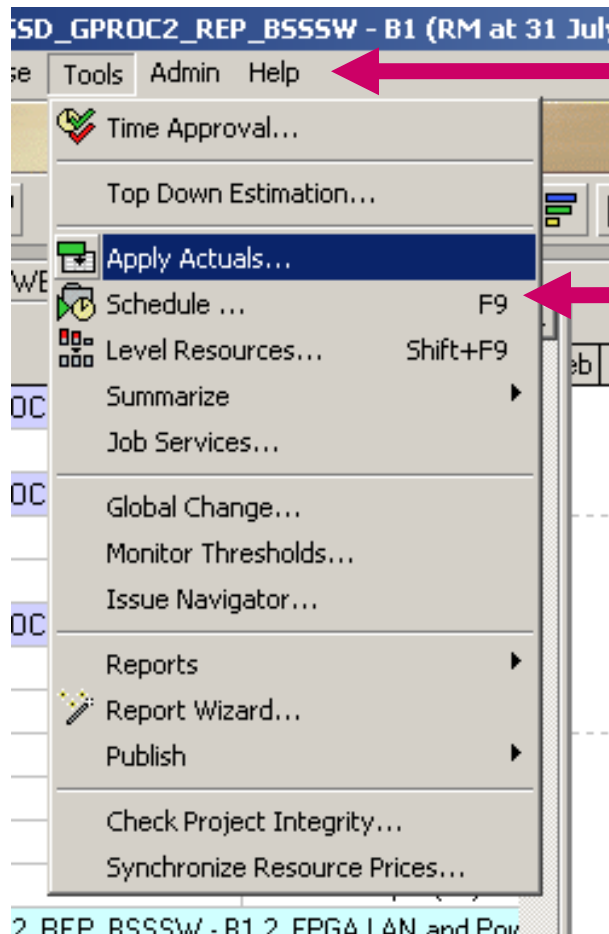
2 Select Baseline

3 Select 'OK'

At this stage it is recommended that you save the layout for future use

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Apply Actuals 1



Select 'Tools'

Select 'Apply Actuals'

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Apply Actuals 2

The screenshot shows the 'Apply Actuals' dialog box. It features a table for project selection, a section for choosing a new data date, and options for how to calculate activity remaining durations. Red arrows point to specific elements, and text annotations describe the steps.

Project(s) to be updated:			
Project ID	Project Name	Current Data Date	Planned Start
GSD_GP...	RM at 31 July 02	02-Aug-02	01-Jan-02

A new data date is used when actuals are applied.

Each project uses its own new data date

The same new data date is used for all projects

New Data Date: 02-Aug-02

When actuals are applied from timesheets, calculate activity remaining durations:

Based on activity duration type

Always recalculate

Buttons: Apply, Cancel, Help

← 4 Select 'Apply'

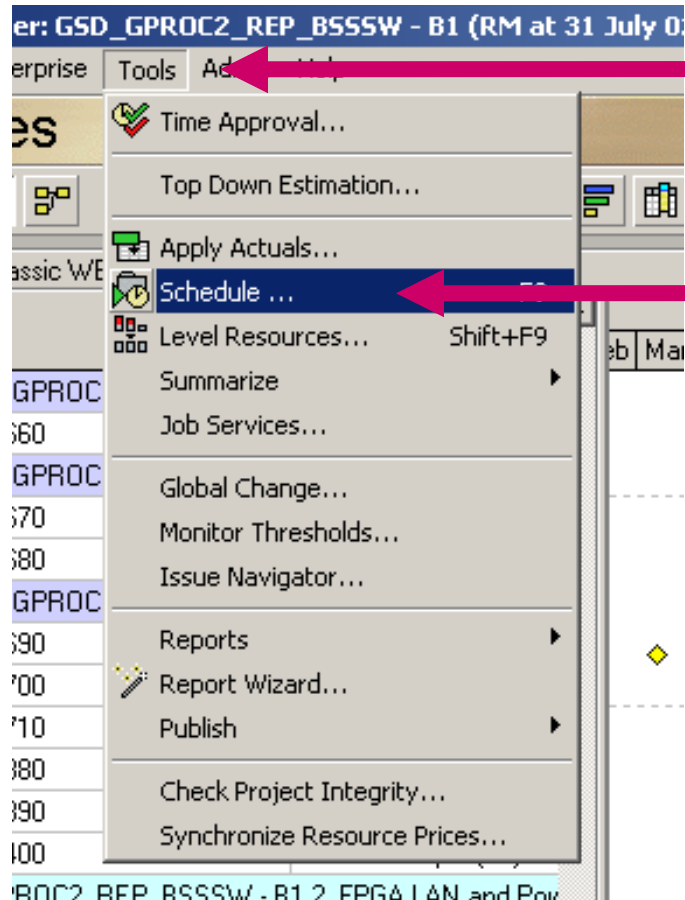
1 Select 'Each project has its Own data date'

2 Chose New Data Date

3 Select 'Always recalculate'

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Move Data Date Forward 1

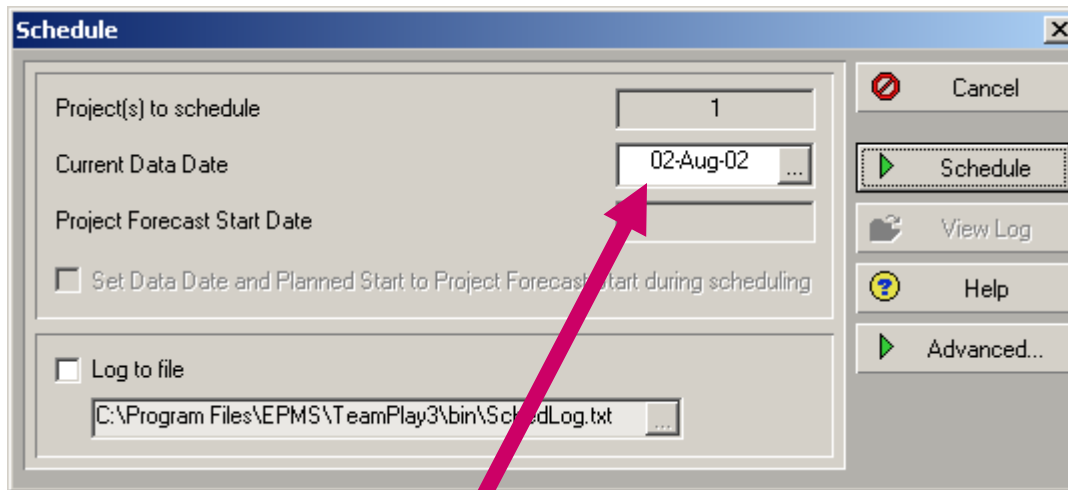


Select 'Tools'

Select 'Schedule'

5 Minute Update

Move Data Date Forward 2



2 Select 'Schedule'

1 Set current Data Date to the same date that actuals were applied

5 Minute Update

Review IN PROGRESS activities 1

The screenshot displays a project management application with a Gantt chart and a task details pane. The Gantt chart shows various tasks with their durations and start/end dates. A pink arrow points to the 'Status' dropdown in the task details pane, which is currently set to 'Started'. The task details pane shows the following information:

Activity	Activity Name	Project
A2300	GPROC3 BSS Software Consultancy	GSD_GPROC2_REP_BSSSW

Planned	Actual	Remaining	At Complete
97.0d	140.0d	20.0d	160.0d

Status	Start Date	Duration %	Total Float	Free Float
<input checked="" type="checkbox"/> Started	28-Jan-02	79.38%	325.0d	0.0d
<input type="checkbox"/> Finished	13-Sep-02			
Exp Finish				

The task details pane also includes a 'Date' field and a 'Labor Units' section. The status dropdown is highlighted with a pink arrow and the text 'Select 'Status''.

**New
Data Date**

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Review IN PROGRESS activities 2

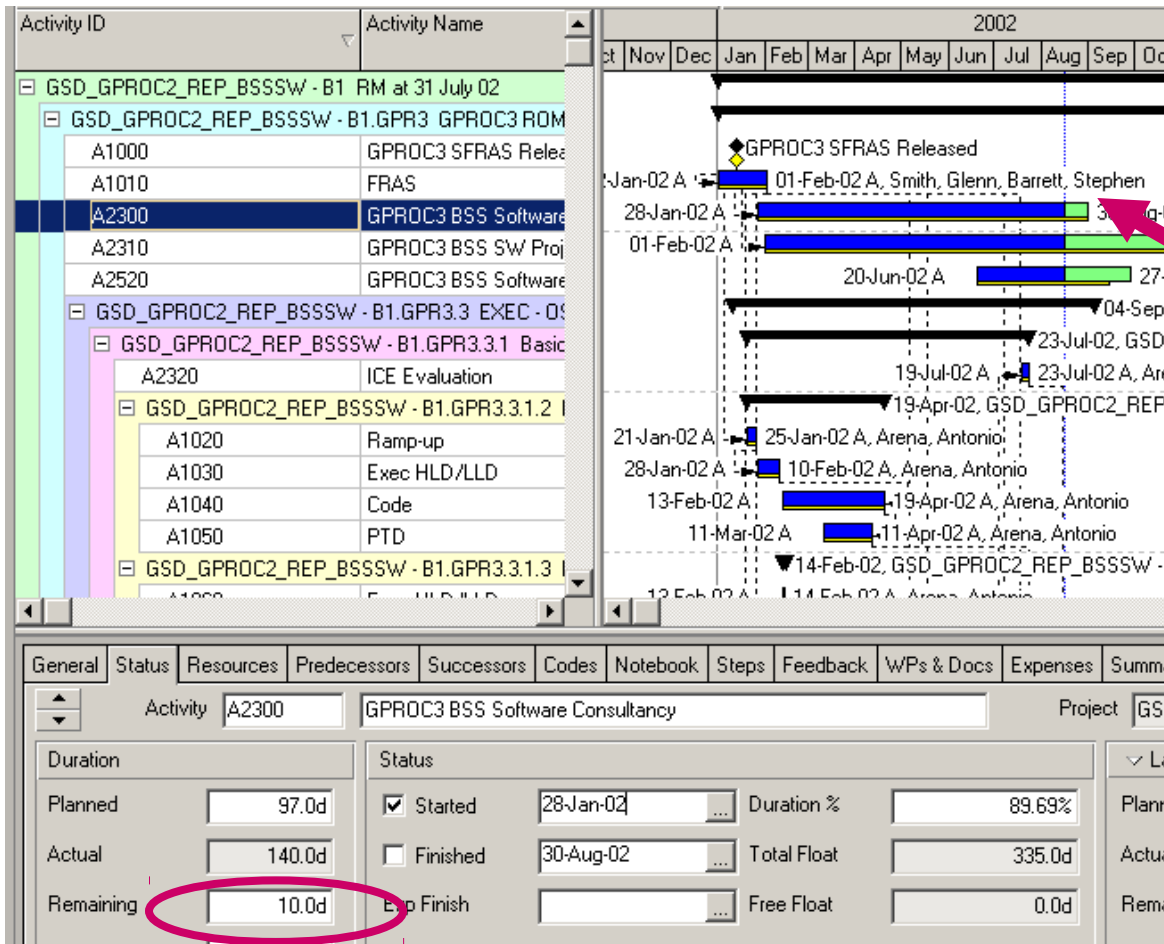
The screenshot displays a project management software interface. On the left, a tree view shows a project hierarchy for 'GSD_GPROC2_REP_BSSSW - B1 RM at 31 July 02'. Activity A2300, 'GPROC3 BSS Software Consultancy', is highlighted. The main area shows a Gantt chart with various task bars and their dependencies. A callout box with a green border points to the Gantt chart, stating: 'This sample shows an Update of Remaining Duration'. Below the Gantt chart, a task detail window for activity A2300 is open. The 'Duration' section shows 'Planned' as 97.0d, 'Actual' as 140.0d, and 'Remaining' as 20.0d. A red arrow points to the 'Remaining' field. The 'Status' section shows 'Started' checked with a date of 28-Jan-02 and 'Duration %' at 79.38%. The 'Exp Finish' field is empty. The 'Constraint' field is also empty. The bottom of the window shows 'User: admin' and 'Data Date: 16-Aug-02'.

This sample shows an Update of Remaining Duration

Update 'Remaining Duration'
(In this case A2300 was changed to 10)

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Review IN PROGRESS activities 3



**Autoschedule then runs
and the activity is shown
as being on time**

5 Minute Update

Review IN PROGRESS activities 4

Activity	Code
A1250	Ramp-up
A2420	HLD/LLD
A2430	Code
A2440	PTD
GSD_GPROC2_REP_BSSSW - B1.GPR3.3.14 EDC	
A2490	Ramp-up
A2500	Code
A2510	PTD
GSD_GPROC2_REP_BSSSW - B1.GPR3.3.7 Init	
A1260	Exec/LLD HLD/Code/

Activity: A2430 Code

Status	Start Date	Duration %
<input checked="" type="checkbox"/> Started	17-Jul-02	10
<input type="checkbox"/> Finished	15-Aug-02	-17

This sample shows an update of Actual Finish Date

TeamPlay Project Manager

The activity Finish Date is for review. Do you want to set the activity to complete on the Review Finish Date instead of the current Finish Date?

Yes No

Select 'Finished'

Select 'No'

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Review IN PROGRESS activities 5

The screenshot displays a Microsoft Project interface. On the left, a task list shows activity A2430 with the code 'Code'. The main area shows a Gantt chart with various task bars. A red arrow points to a bar for activity A2430 with a finish date of 01-Aug-02. Below the Gantt chart, the 'Task Information' pane is open for activity A2430. The 'Status' section shows 'Started' on 17-Jul-02 and 'Finished' on 01-Aug-02. The 'Finished' date is circled in red. The 'Duration' section shows 'Planned' as 4.0d and 'Actual' as 12.0d. The 'Project' field is set to 'GSD_GPROC2'.

A Finish date of 01-Aug was selected on activity A2430, Autoschedule then runs. Note that all predecessors will be updated as well

5 Minute Update

Review progress of activities on Data Date 1

The screenshot displays a project management software interface. On the left, a task list shows activity A2500 highlighted in blue. The main area features a Gantt chart with various activity bars and their dependencies. A green callout box points to a bar for activity A2500, stating: "This sample shows an update of Actual Start Date". Below the Gantt chart, the activity details for A2500 are shown. The 'Status' section has a red arrow pointing to the 'Started' checkbox, which is currently unchecked. The 'Actual' start date is set to 23-Aug-02, and the 'Planned' start date is 16-Aug-02.

Activity	Code	Project
A2440	PTD	
GSD_GPROC2_REP_BSSSW - B1.GPR3.3.14 EDC		
A2490	Ramp-up	
A2500	Code	
A2510	PTD	
GSD_GPROC2_REP_BSSSW - B1.GPR3.3.7 Init		
A1260	Exec/LLD HLD/Code/I	
GSD_GPROC2_REP_BSSSW - B1.GPR3.3.13 MM		
A1270	Ramp-up	
A1280	Exec HLD/LLD	
A1288		

Activity	Code	Project
A2500	Code	GSD_GPROC2_REP_BSSSW

Duration	Status	Start Date	Duration %	Total Float	Free Float	Labor Units
Planned: 6.0d	<input type="checkbox"/> Started	16-Aug-02	0%	335.0d	0.0d	Planned
Actual: 0.0d	<input type="checkbox"/> Finished	23-Aug-02				Actual
Remaining: 6.0d	Exp Finish					Remaining

Select 'started' on Activity A2500

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Review progress of activities on Data Date 2



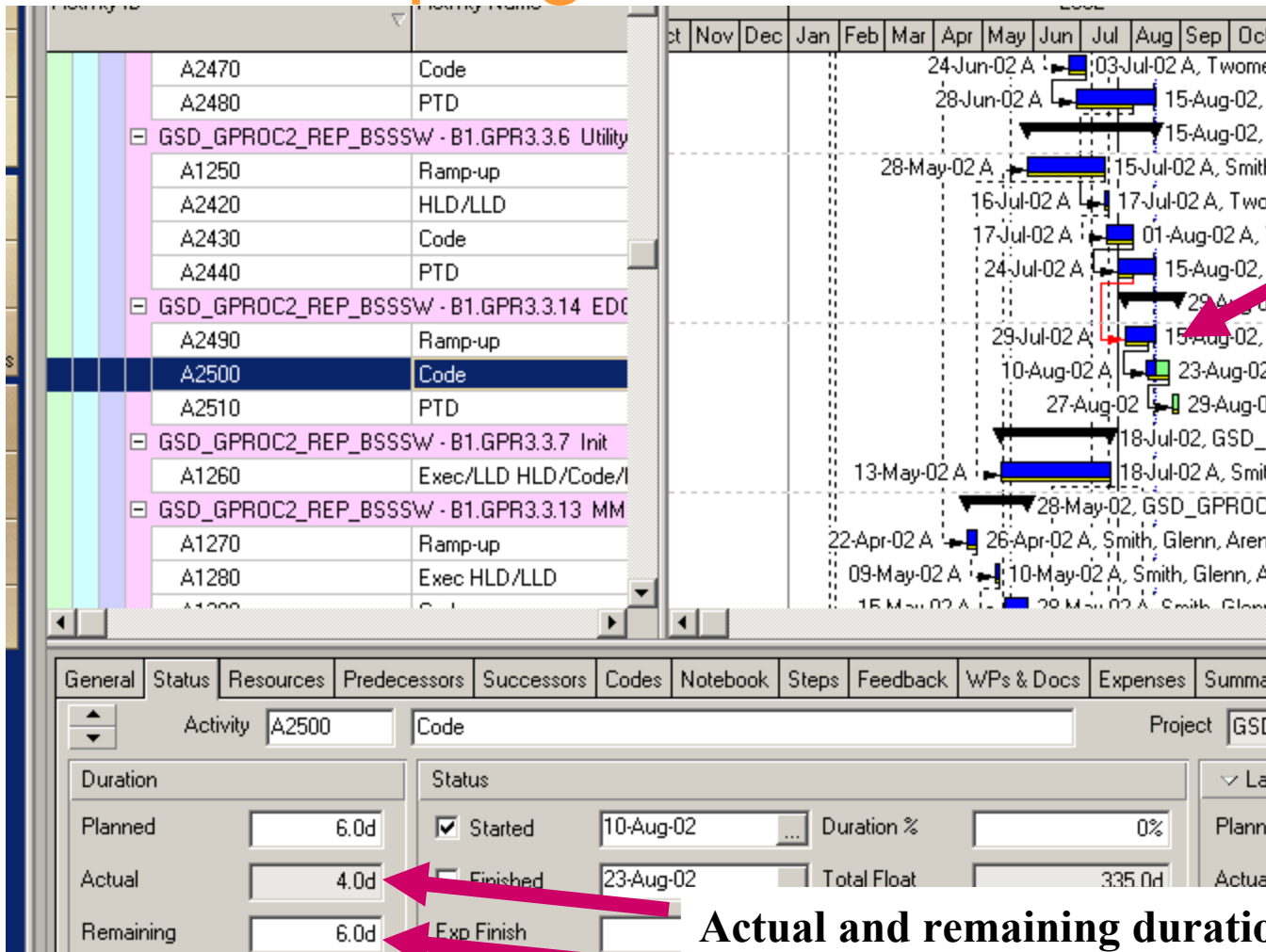
Select 10th August

Either double click on 10

(or click Select)

5 Minute Update

Review progress of activities on Data



The Activity and all Successors are automatically updated

Actual and remaining duration are automatically calculated

5 Minute Update

Switch OFF auto schedule

