

Appendix G – Use of Reflection Projects for progress updating

Here is a view of our projects :

Project ID	Project Name	Total Activities
Enterprise	All Initiatives	59500
NEWPROJ-1	(New Project)	1
Asset One	All Asset One projects	0
Asset One Live	Live Projects	0
# 1234	Tieback	0
# 1235	Replace Stairwell M3e	0
# 1236	Fabric Maintenance	0
# 1237	Firewater Ring main Turnaround	0
# 1238	Flare tip Turnaround	0
# 1239	Flowline stuff	0
# 1240	Comms Upgrade	0
# 1241	Gym Upgrade	0
Asset One Sandbox	Sandbox	0
Training	Training	11
BoQ	Bill of Quantity EV	0

The projects under the Live Projects EPS represent a portfolio of live projects we DO NOT want to do what-if games with. That includes entering progress which has not been validated.

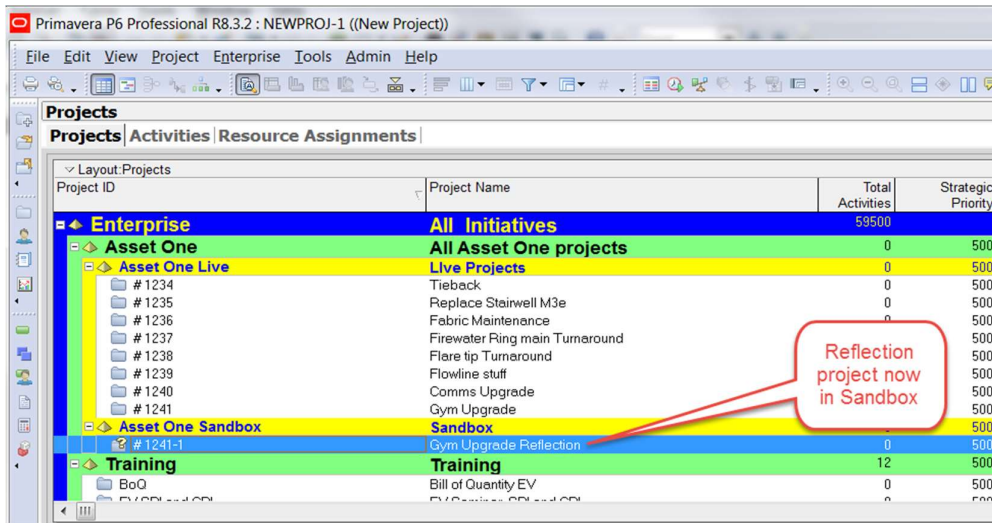
We are going to update progress for the “Gym Upgrade” project.

Step One – take a reflection and Check Out the live project

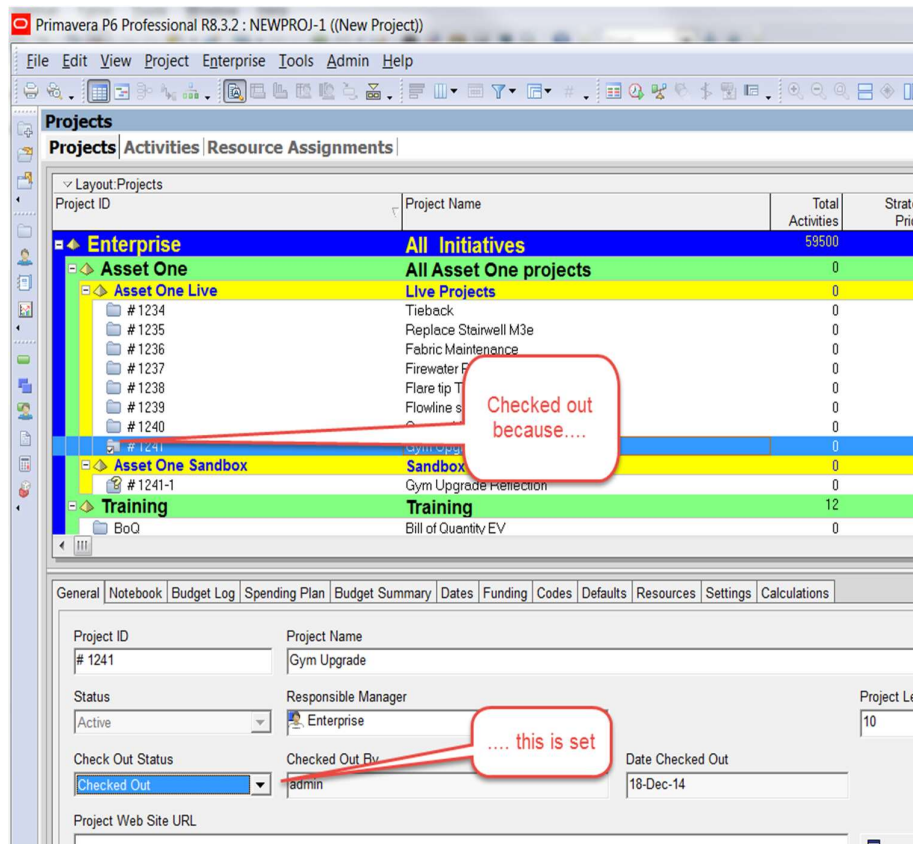
First we take a reflection of the project;

Project ID	Project Name	Total Activities	Strategic Priority
Enterprise	All Initiatives	59500	
Asset One	All Asset One projects	0	500
Asset One Live	Live Projects	0	500
# 1234	Tieback	0	500
# 1235	Replace Stairwell M3e	0	500
# 1236	Fabric Maintenance	0	500
# 1237	Firewater Ring main Turnaround	0	500
# 1238	Flare tip Turnaround	0	500
# 1239	Flowline stuff	0	500
# 1240	Comms Upgrade	0	500
# 1241	Gym Upgrade	0	500
Asset One Sandbox	Sandi	0	500
Training	Train	0	500
BoQ	Bill of Q	0	500
EV SPI and CPI	EV Set	0	500

Now we Cut-and-Paste the project into our Sandbox:



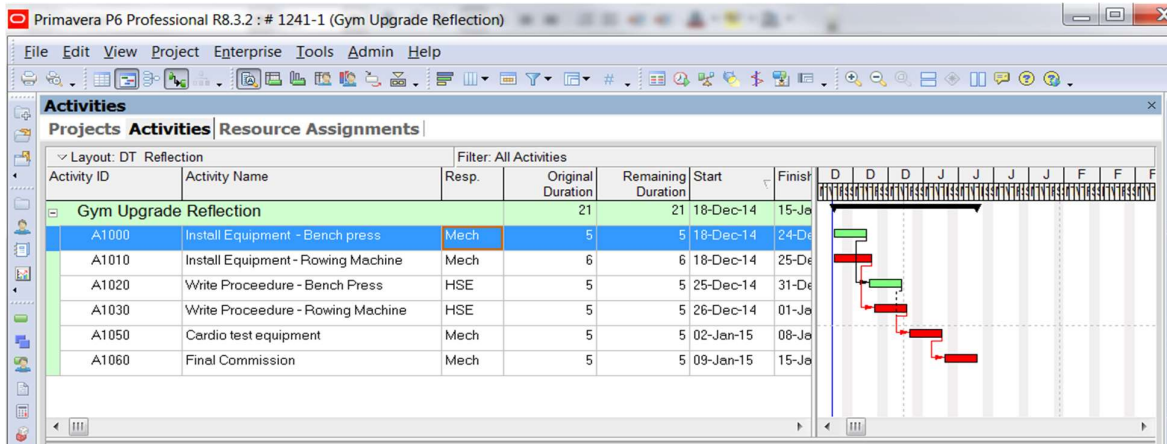
... and then we make sure no-one can update the source project, by Checking it Out:



Now the portfolio of all the asset's projects can still be used – but no-one can update our Gym Upgrade project until we check it back in.

Step 2 – issue the turnaround documents

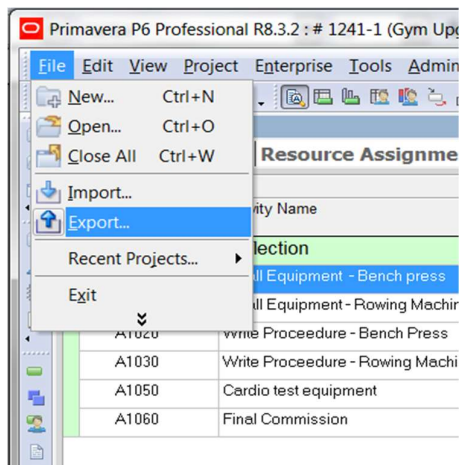
Open the Reflection project we just created:



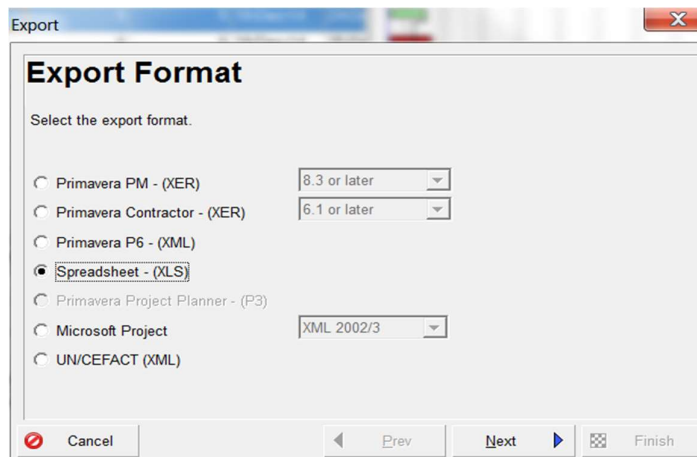
There is a project-specific Activity Code called Resp.

This indicates who is responsible for doing the work, AND reporting progress. We want to send a spreadsheet to the appropriate departments to collect progress.

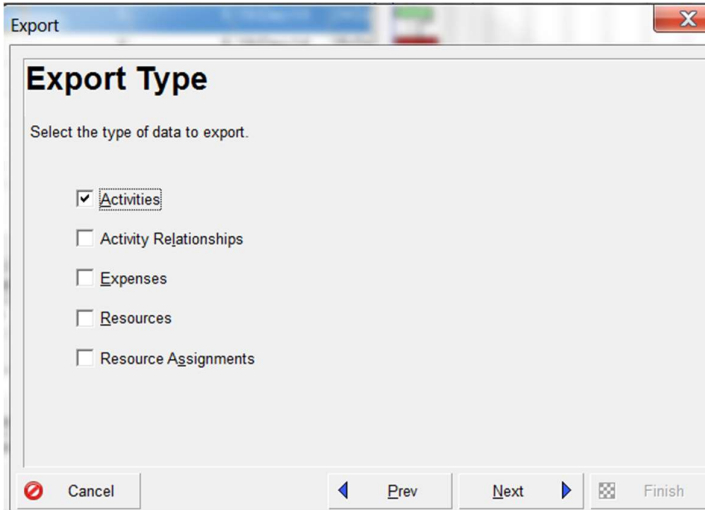
Select File and Export:



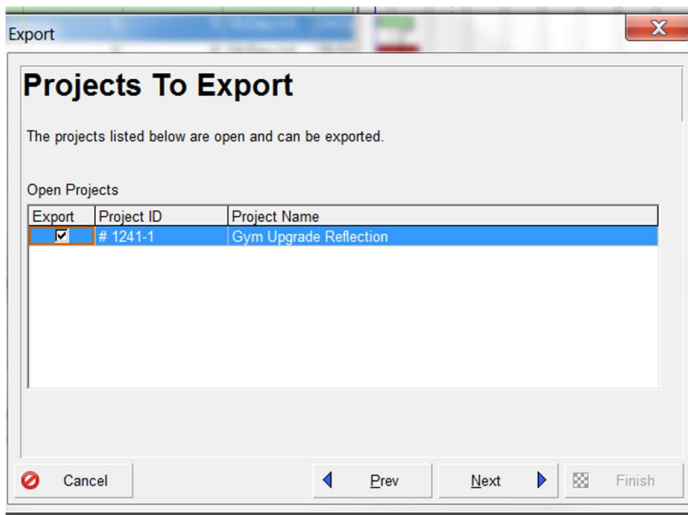
Choose Spreadsheet as the format:



We only need one “sheet” out of the possible five:

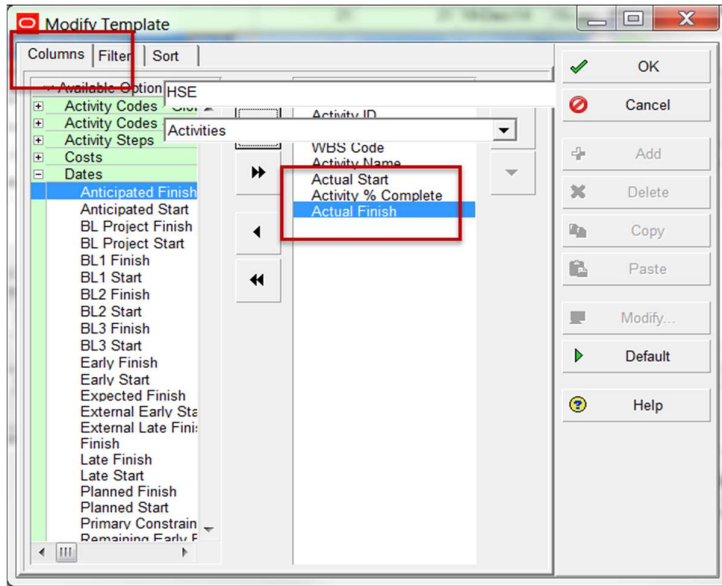


You can only export from an open Project:

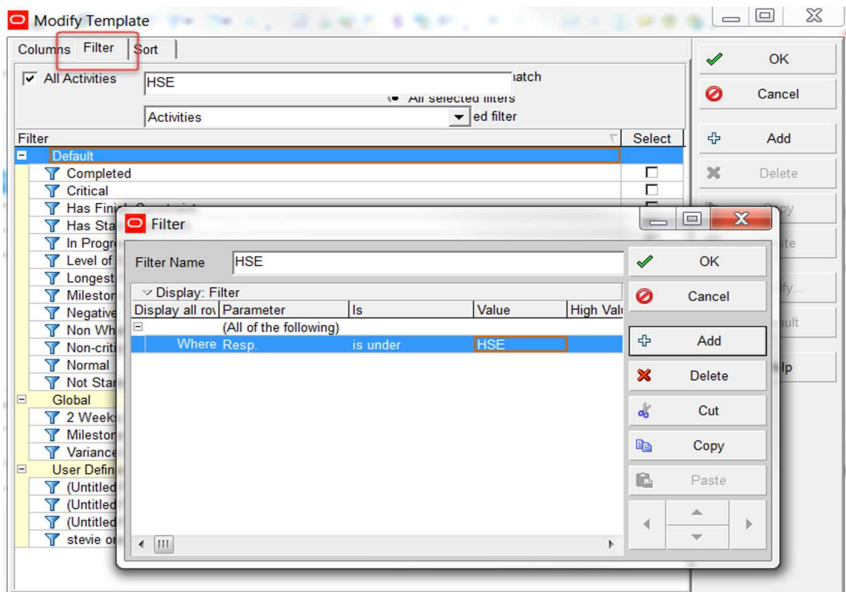


Because we have not done this before, we need to Add an Export Template. These can be reused. We need to define the columns we want to export, and the filter:

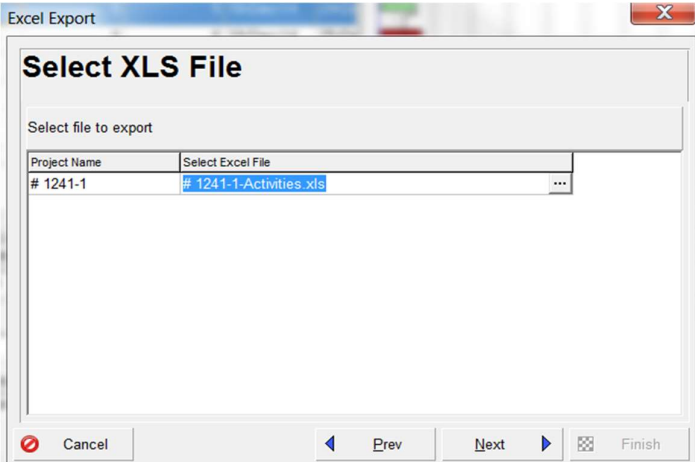
We need the “Actual Start” “Activity % Complete” and “Actual Finish” columns. There is a hideous display bug in the latest version:



We need to Filter the spreadsheet by the Resp. Activity Code



Finally we need to say where the XLS file goes:



Step Three – the spreadsheet

Open the Spreadsheet we made:

task_code	status_code	wbs_id	task_name	act_start_date	complete_pct	act_end_date	delete_record_flag
Activity ID	Activity Status	WBS Code	Activity Name	Actual Start	Activity % Complete(%)	Actual Finish	Delete This Row
A1020	Not Started	# 1241-1	Write Proceedure - Bench Press		0		
A1030	Not Started	# 1241-1	Write Proceedure - Rowing Machine		0		

several points to make about the above spreadsheet:

- It is in the format that P6 can import. When P6 imports an XLS file it is NOT a paste – P6 reads row one of the spreadsheet to understand which field is being updated. If they are not spelt correctly P6 will ignore them, that is why we did the formal Export to avoid such mistakes.
- When we import the spreadsheet, an “append and update” is performed, keyed on Activity ID.
- This is one Spreadsheet/One Project for both Import and Export. There are third party solutions that make this built-in functionality seem restricting.

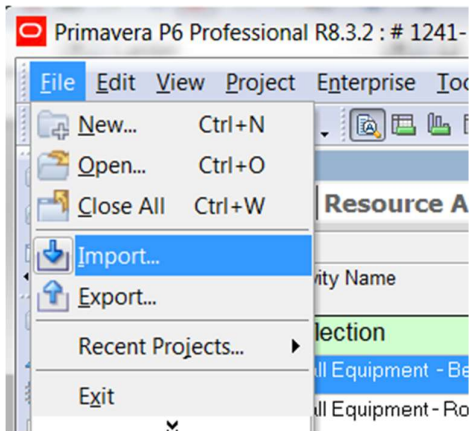
We email the above spreadsheet to the responsible person who then fills it and returns it:

task_code	status_code	wbs_id	task_name	act_start_date	complete_pct	act_end_date	delete_record_flag
Activity ID	Activity Status	WBS Code	Activity Name	Actual Start	Activity % Complete(%)	Actual Finish	Delete This Row
A1020	Not Started	# 1241-1	Write Proceedure - Bench Press	19/12/2014	20		
A1030	Not Started	# 1241-1	Write Proceedure - Rowing Machine		0		

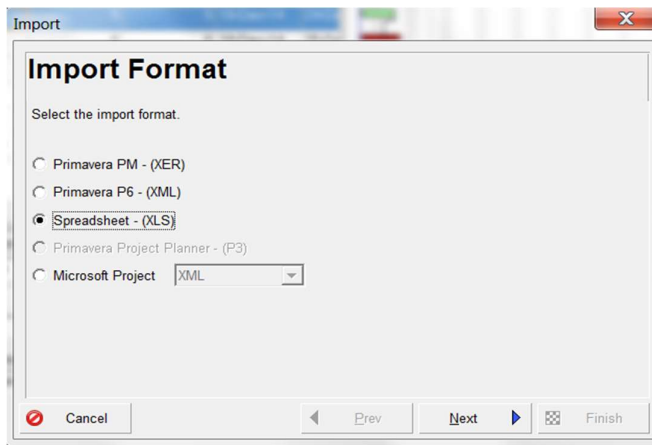
Step Four– Import the spreadsheet

Remember to close the spreadsheet – it is a single user document.

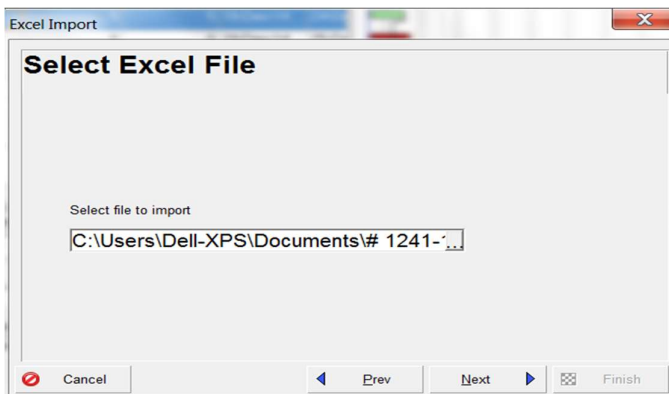
Choose File and Import:



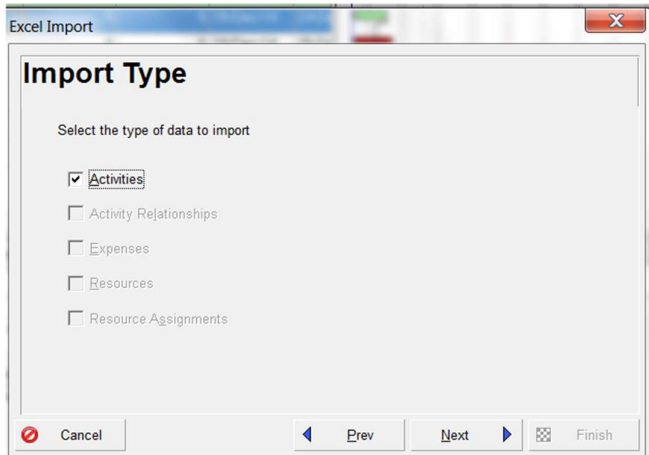
Select Spreadsheet:



Pick the *correct* file!:

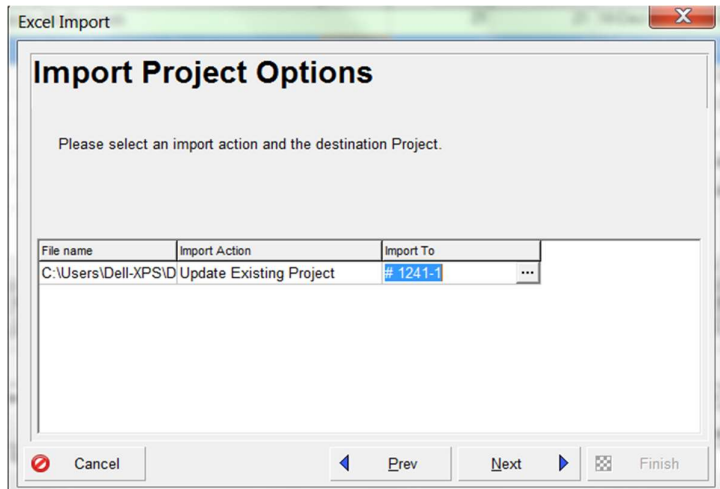


Choose the Activity sheet :



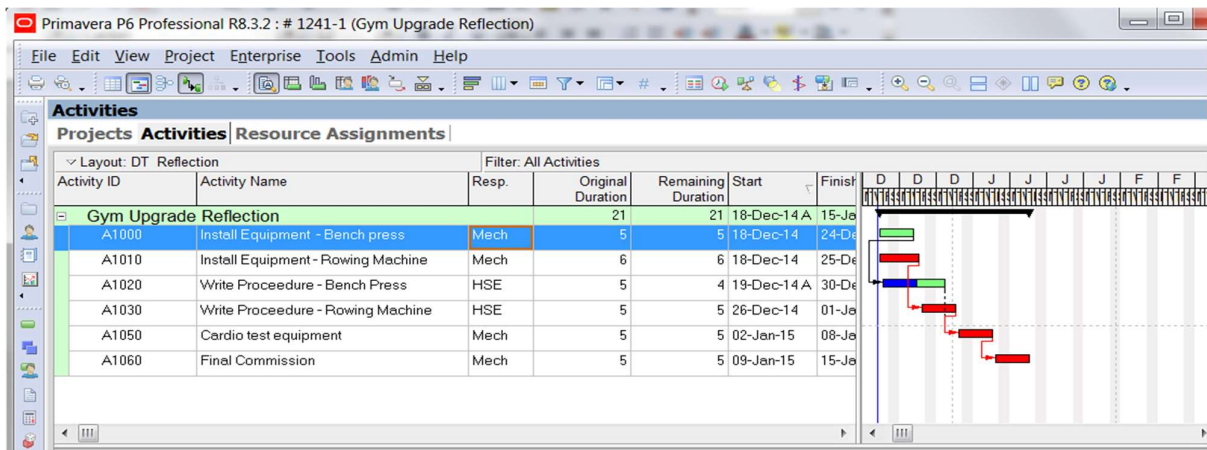
select the destination project:

Which is, of course, our Reflection copy



Choose finish, and wait!

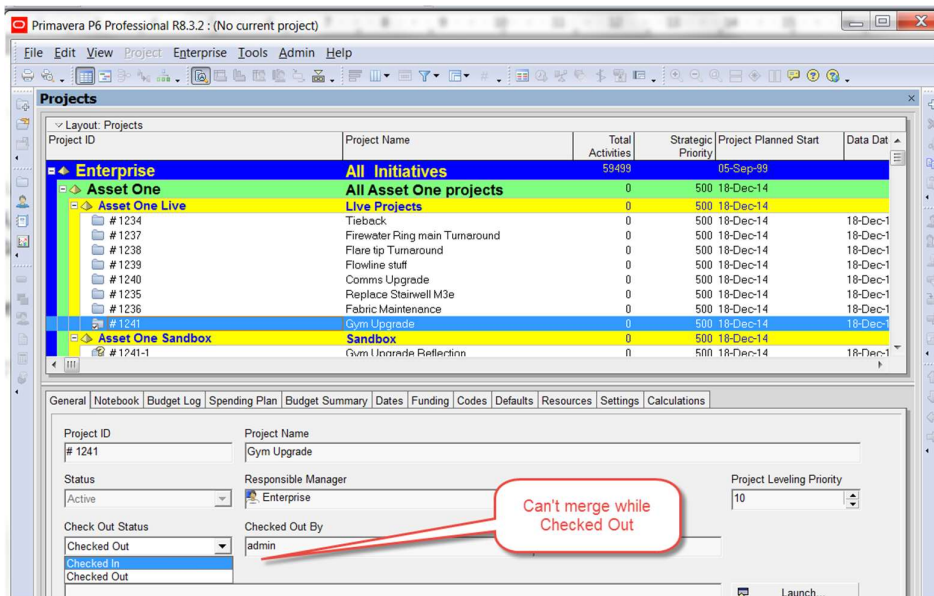
Bingo:



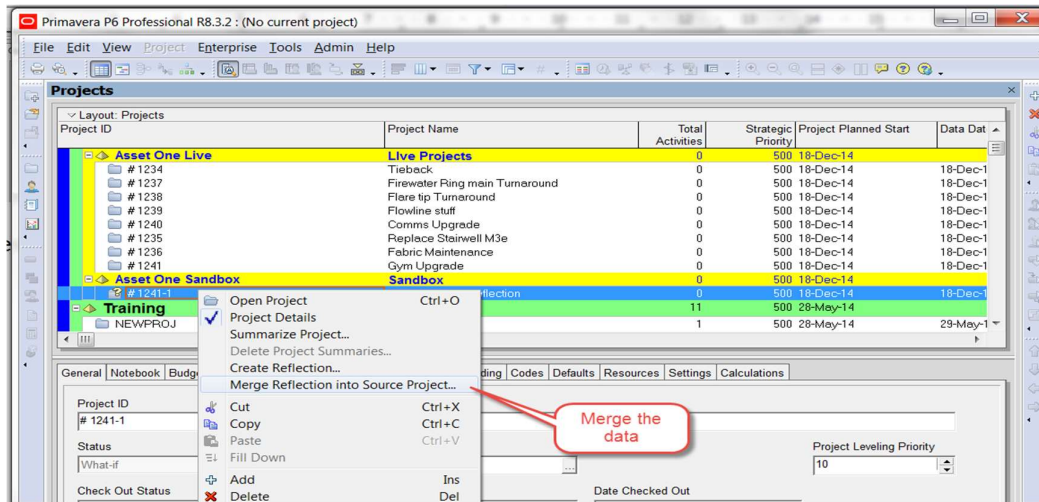
We can update our Reflection project with the spreadsheets from all our “responsible” progress contacts, and if (heaven forbid) they send us a load of mince, we delete the project and have no rework to reinstate the Live project which is available all of the time, albeit in a “read only” state.

Step Five – merge the data

The first thing we have to do is check in the original project:



Now we merge, select our reflection project, right click on it and choose Merge Reflection into Source Project:



Note the option below. Best to take a baseline AND make a backup. The report can be printed, and any particular changes de-selected.

