Using The Primavera P6 Global Change Tool

Whenever you find yourself making large numbers of tedious changes to activities, resource assignment or other elements in Primavera P6, there may be an alternative and massively time-saving option for you. Primavera P6 Professional offers a Global Change tool under the Tools menu. This allows you to create Global Change definitions that will modify data based upon a filter.

For example, when you have a large project with many similar resource assignments that need to be swapped out, increased of reduced, it's nice to have a tool that enables you to make global adjustments in seconds, rather than potentially multiple hours. P6's Global Change feature enables you to select activities, activity resource assignments, or project expenses parameters and then perform computations on them using operators and other driving parameters. The computations are activated or not by conditional statements.

This article demonstrates how to use the Primavera P6 Global Change feature to make calculated adjustments to the schedule.

The Global Change feature in Primavera P6 enables computational adjustments to activities, activity resource assignments, and/or project expenses. This article is limited to demonstrating changes to activity resource assignments, however, the approach applies to all three.

To activate the Global Change feature select Tools | Global Change from the main drop down menu. In the Global Change dialog select + New to create a new computation. For our example type in the name 'Double Groundman & Lineman' and select Modify, Figure 1.
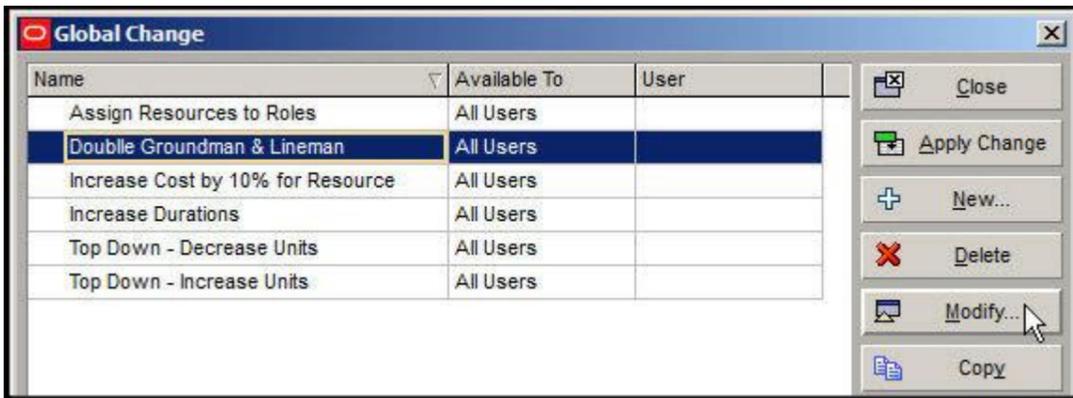

Figure 1

This brings up the Modify Global Change dialog. In the Select Subject Area drop down menu select Activity Resource Assignments, Figure 2.
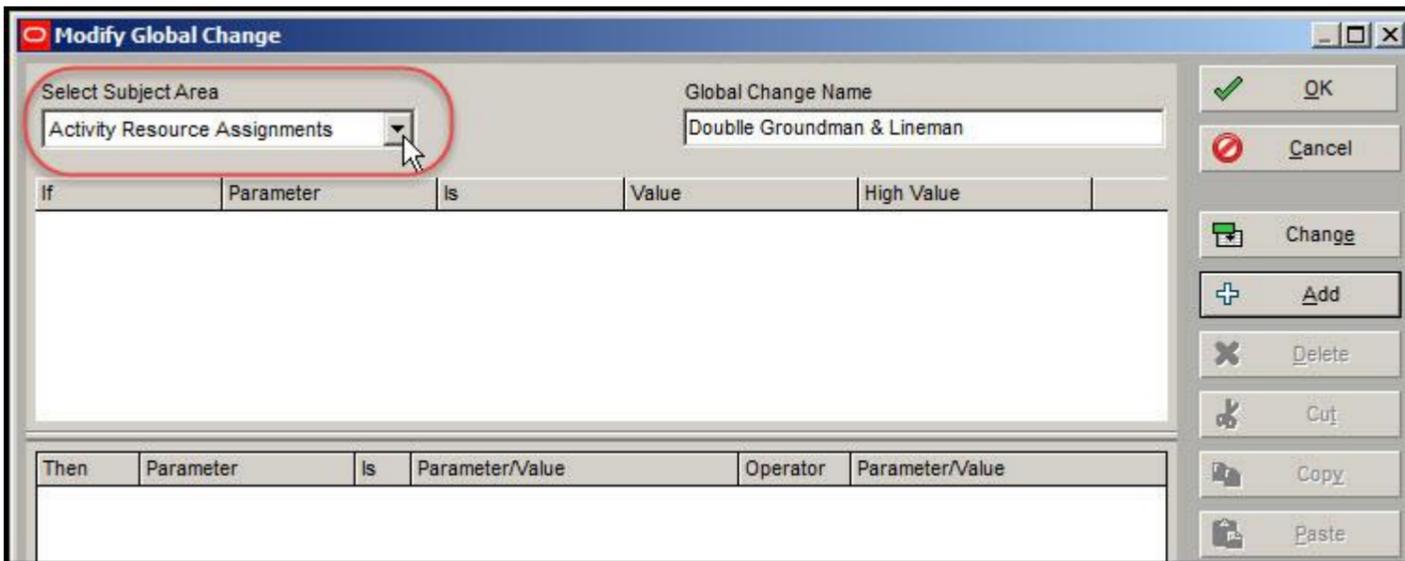

Figure 2

Notice in Figure 2 the breakout of the Modify Global Change dialog, which is 'If-Then-Else'. This may be interpreted as saying 'If' the defined condition is true 'then' make the following computational adjustments or 'else' make this other computational adjustment. Our demonstration only uses the 'If-Then' part of the relationship.

In our demonstration we want to multiply the budgeted units/time of all Lineman and Groundman resources by a factor of two. This will double the daily effort of these resources on all the associated activities. To begin our computational definition we start with the 'If' conditional statement. Set the parameter to 'Any of the following', Figure 3.
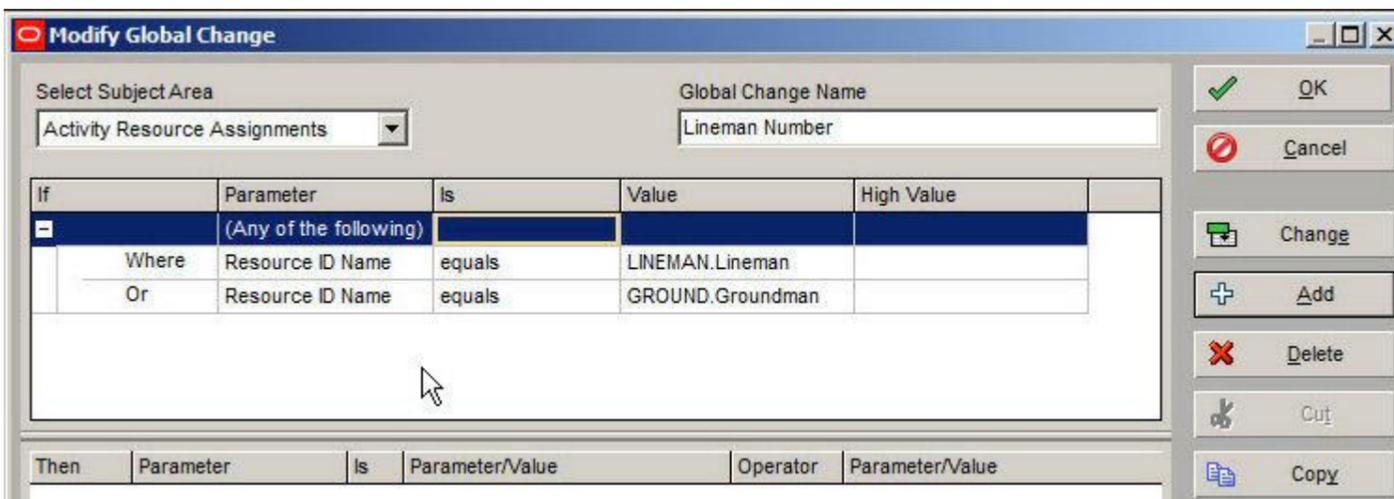
This will place an 'or' between the following associated statements. The first parameter is Resource ID Name, the equivalency is equals, and the value is Lineman, again, Figure 3. The next line of the conditional statement begins with 'or', and the parameter is Resource ID Name, equivalency is equals, and the value is Groundman, Figure 3. If either one of these conditional statements is true then Global Change will perform the following associated computation.

Click on the 'Then' computational statement section and select the + Add button, Figure 4.
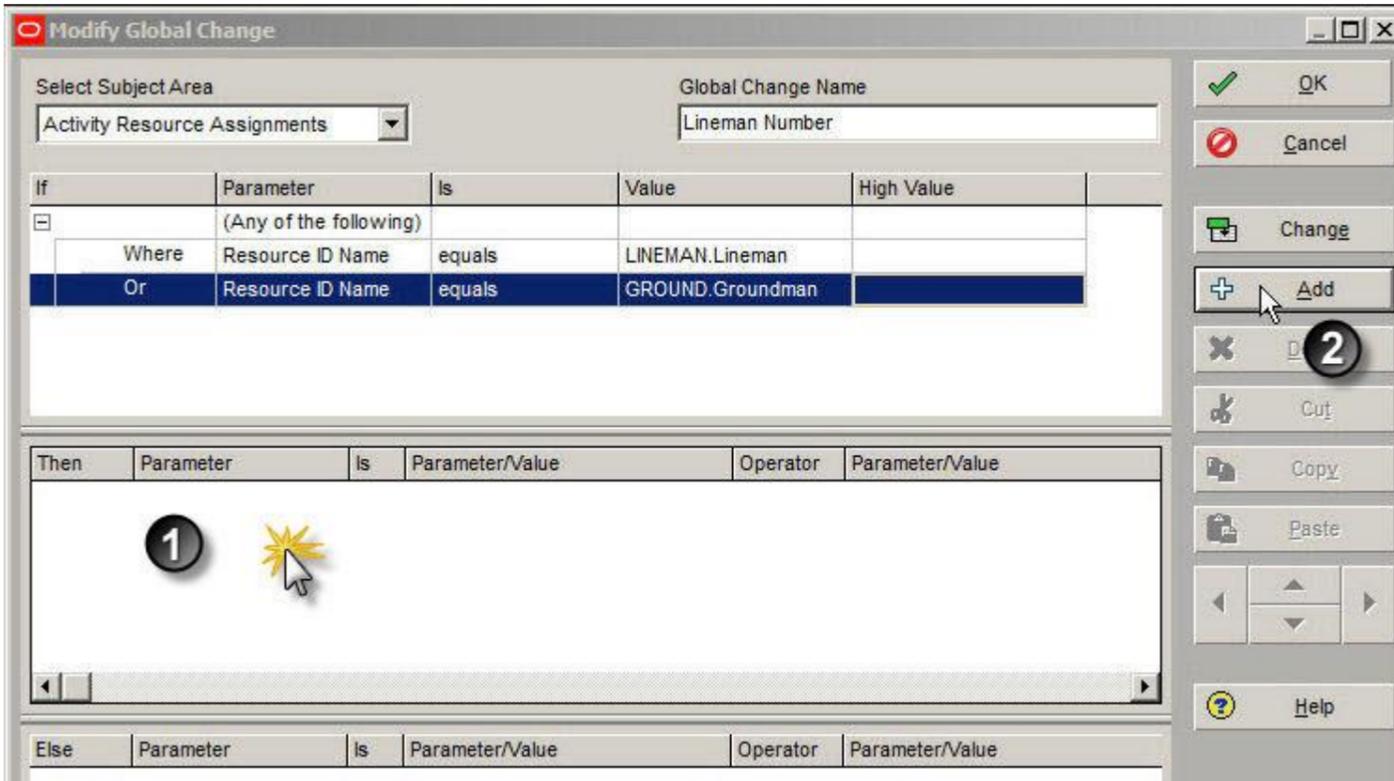
Set the parameter to Budgeted Units/Time. The equivalency defaults to '='. On the other side of the equation set the parameter/value to Budgeted Units/Time, Operator to multiplication '*', and the final parameter/value to 2, Figure 5.
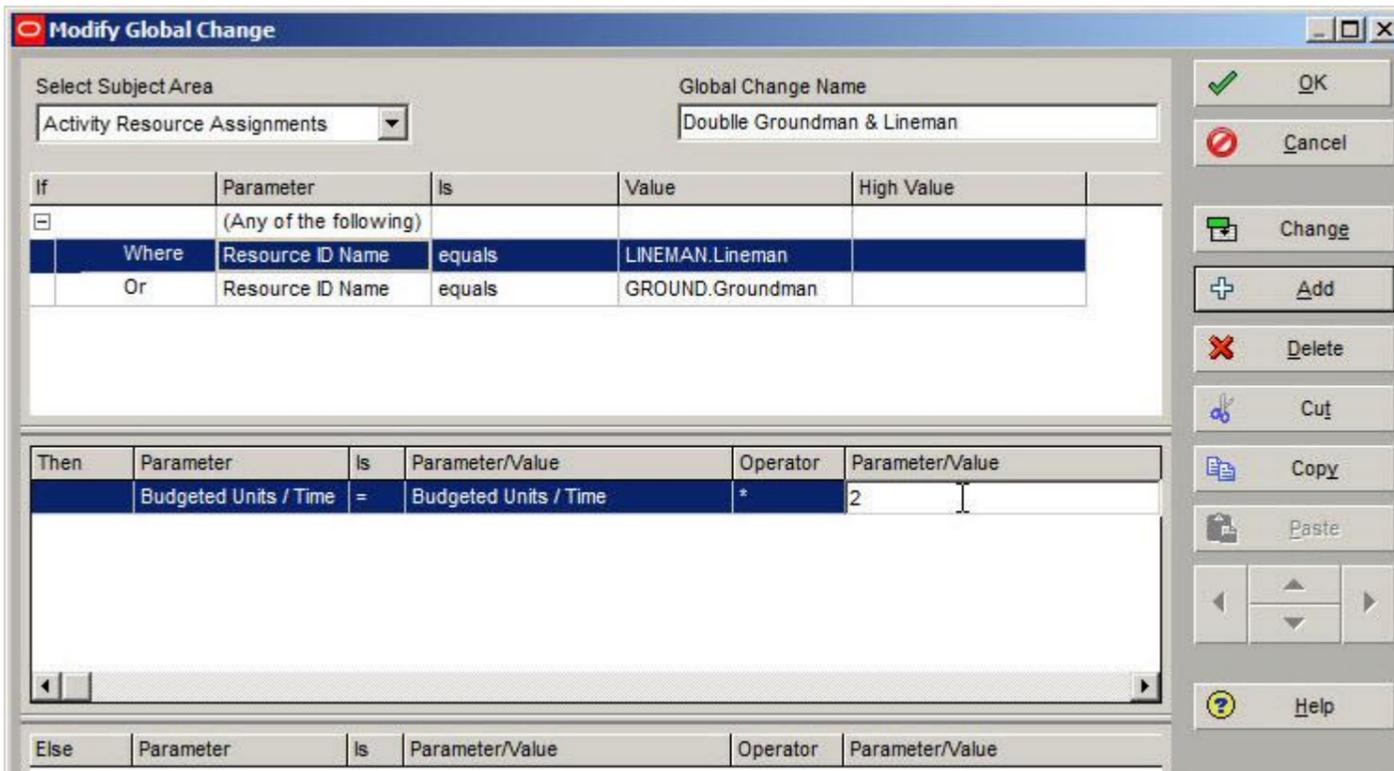
When you enter the value 2 the feature adds the identifier h/h making it 2h/h, which will simply double the resources. Now your conditional statement and related computational equation is ready.

Click OK, and highlight your Global Change statement. Make the conditional computational statement available to all users. Note you may also copy and paste your Global Change statement within the Global Change dialog. Also, you can Export and/or Import your Global Change statement.

Select Apply Changes, Figure 6.

This generates a report of the computations effect on each activity and resource that matches the conditional statement. Review the report, and if the computations look correct click the Commit Changes button in the lower right hand corner of the Global Change Report dialog.


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===============================================================================
Primavera P6 Professional R15.1

Global Change:        Increase Resource Assignments
Projects:             Wellmont Substation
Date:                 Friday, June 12, 2015
===============================================================================

Activity ID       Resource ID       Field                   Old Value           New Value
-----------       -----------       -----                   ---------           ---------
W1040             LINEMAN           Budgeted Units / Time   20.0h/d             40.0h/d

W1040             GROUND            Budgeted Units / Time   20.0h/d             40.0h/d

W1070             LINEMAN           Budgeted Units / Time   20.0h/d             40.0h/d

W1070             GROUND            Budgeted Units / Time   2.9h/d              5.7h/d

W1080             LINEMAN           Budgeted Units / Time   20.0h/d             40.0h/d

W1080             GROUND            Budgeted Units / Time   20.0h/d             40.0h/d

W1090             LINEMAN           Budgeted Units / Time   20.0h/d             40.0h/d

W1090             GROUND            Budgeted Units / Time   20.0h/d             40.0h/d

W1100             LINEMAN           Budgeted Units / Time   20.0h/d             40.0h/d

W1100             GROUND            Budgeted Units / Time   20.0h/d             40.0h/d

W1110             LINEMAN           Budgeted Units / Time   20.0h/d             40.0h/d

W1110             GROUND            Budgeted Units / Time   20.0h/d             40.0h/d

W1120             LINEMAN           Budgeted Units / Time   20.0h/d             40.0h/d

W1120             GROUND            Budgeted Units / Time   20.0h/d             40.0h/d

W1130             LINEMAN           Budgeted Units / Time   20.0h/d             40.0h/d

W1130             GROUND            Budgeted Units / Time   20.0h/d             40.0h/d

W1150             LINEMAN           Budgeted Units / Time   20.0h/d             40.0h/d

W1150             GROUND            Budgeted Units / Time   20.0h/d             40.0h/d
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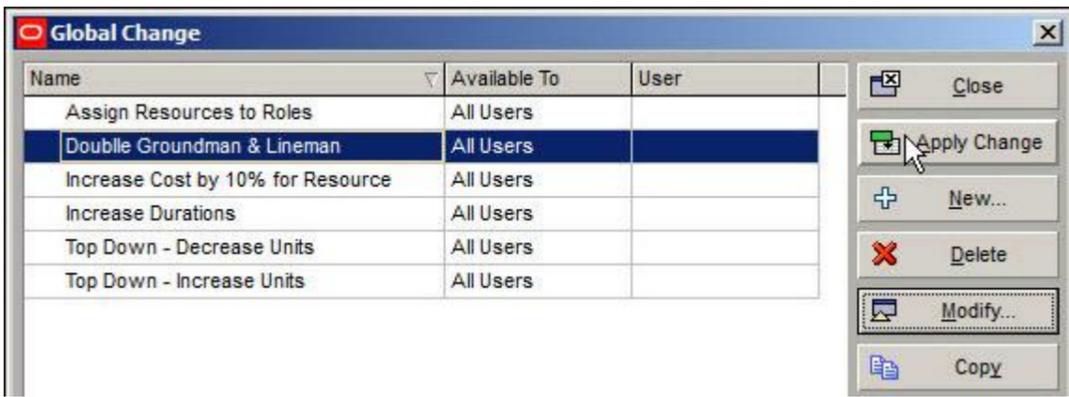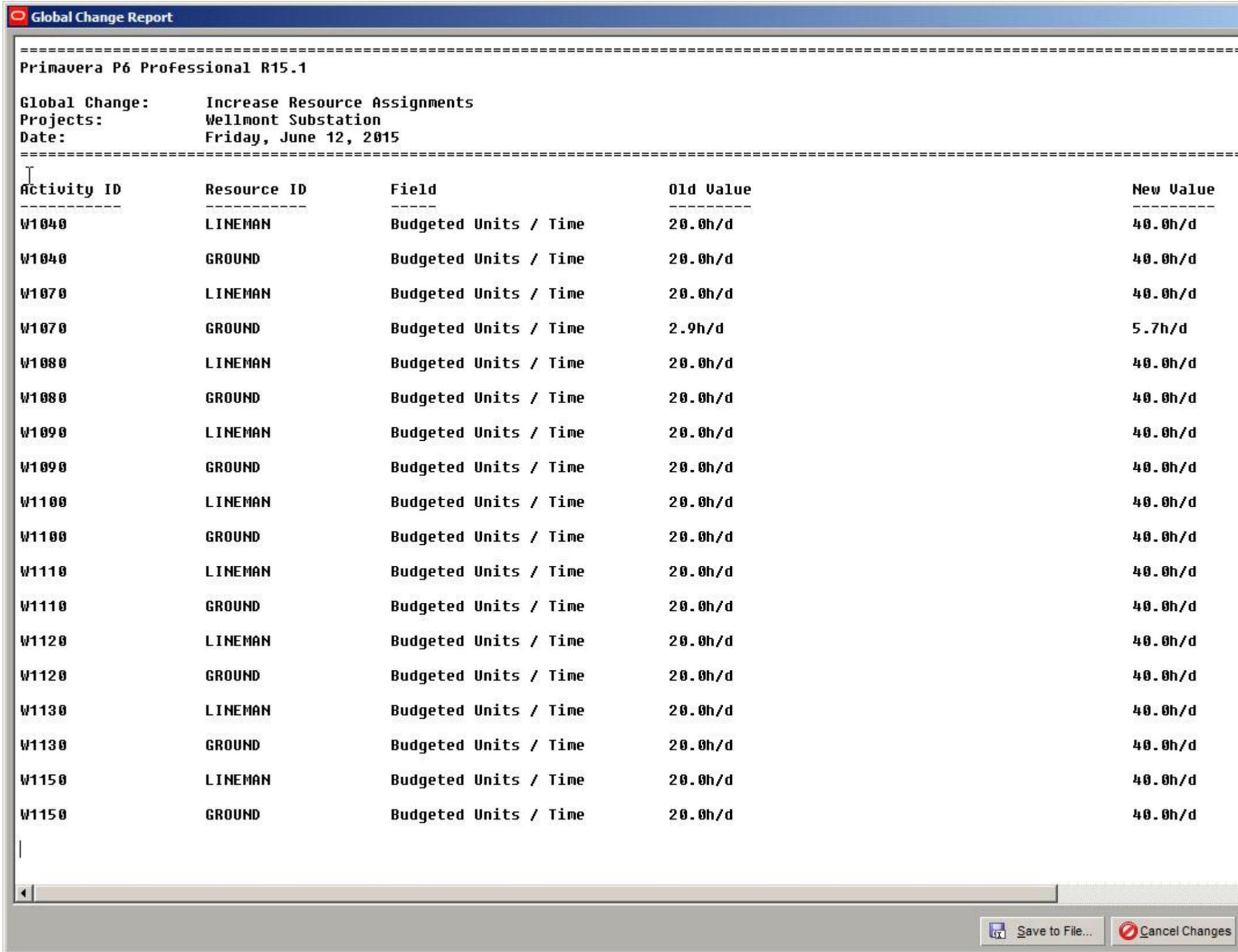
You may also save the Change Report as a text file on the operating system.

Summary

The Global Change feature is a powerful tool in Primavera P6 that allows for the definition of conditional statements and associated computational statements. The subject areas for the statements are activities, activity resource assignments, and project expenses.

The logic of the Modify Global Change feature follows the 'If-Then-Else' logic available to most software programming languages. This demonstration serves as an introduction to the Primavera P6 Global Change feature. You are encouraged to experiment with this feature, as it is flexible and may serve many useful functions that require a familiarity in order to utilize.

The Global Change feature is very useful when Primavera P6 will not permit you to import certain fields, such as an expected finish date. The trick here is, to create a UDF and make the format of the field the same as the P6 field that an Excel import will not let you change. Then you can populate the UDF in Excel and import it into P6, then run a global change to set the P6 field equal to the UDF.