

Document No: SB003-P3

Revision No:

Last Updated: April 18, 2003

Software Version: P3 – Version 3.0 and later

Author: Eric Chou

BRIEF

The previous version (before 3.0) of P3 can only spread actual data evenly from the actual start date to the data date. The 3.0 version has introduced the feature of Period Performance Data, which can store periodic actual and earned values per resource so that the historical actual cost and quantity for each resource can be accurately reported.

This bulletin will show you how the period performance is stored and can be edited to some extent.

SOLUTION

Rules for storing period performance successfully

Considering the following before storing period performance:

1. You can't change period performance data once you store them, you may want to create a backup copy of the project before executing the option.

Editor note: This is a statement from the P3 Manual. However, it is possible to modify some data. I will discuss them in detail later.

2. The time period for updating the schedule should be fixed such as week or month.
3. The Store Period Performance (**See Figure 1**) should be executed only after the previous performance data is finalized and before the next update period begins. As soon as you execute this option, the Actual This Period for resources will be reset to Zero and used for the next (current) period. For those people who always keep a copy of the historical period update, you execute this option in the schedule of the coming period as soon as it was copied from the previous period update.
4. Changing prices after closing out an update period may result in cost variance.
5. To store period performance (close out the period) successfully, the Actual Start date has to be recorded for the activity, which the Actual to Date for resources is great than Zero. Also, the Actual Finish date for the activity can't be later than the schedule Data Date.

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Editor Note: This may cause some problems in the practical world. For example, the Contractor often gets paid for a portion of the stored material without recording the Actual Start on the activities yet. Also, when the Contractor updates the schedule, they may also record some actual dates later than the data date for convenience since they occurred only within several days after the data date.

6. If P3 can't close out all resource assignments, it creates a log file called CLOSEOUT.OUT in your USERLOC folder listing assignment it could not process. (**See Figure 2**) P3 also create an audit file in the project folder name <Project Name>HST.OUT that contains a history of closeout dates for the project.
7. When you cut, copy or paste activities within or between projects, the period performance data are not copied over to the new activities.

Editor Note: The P3 Manual and Online Help stated otherwise. However, I can't reach the same results as I tested.

8. Exclusive Access to the project is required to store Period Performance.
9. When you close out at the project group level, P3 closes out each member project based on each project's respective data date. It is important that the data date at the project group should be set to the same or a later date than the data date in each of its member projects.

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Store, Review and Check the Period Performance Data

1. To store period performance, choose menu option Tools, Store Period Performance.

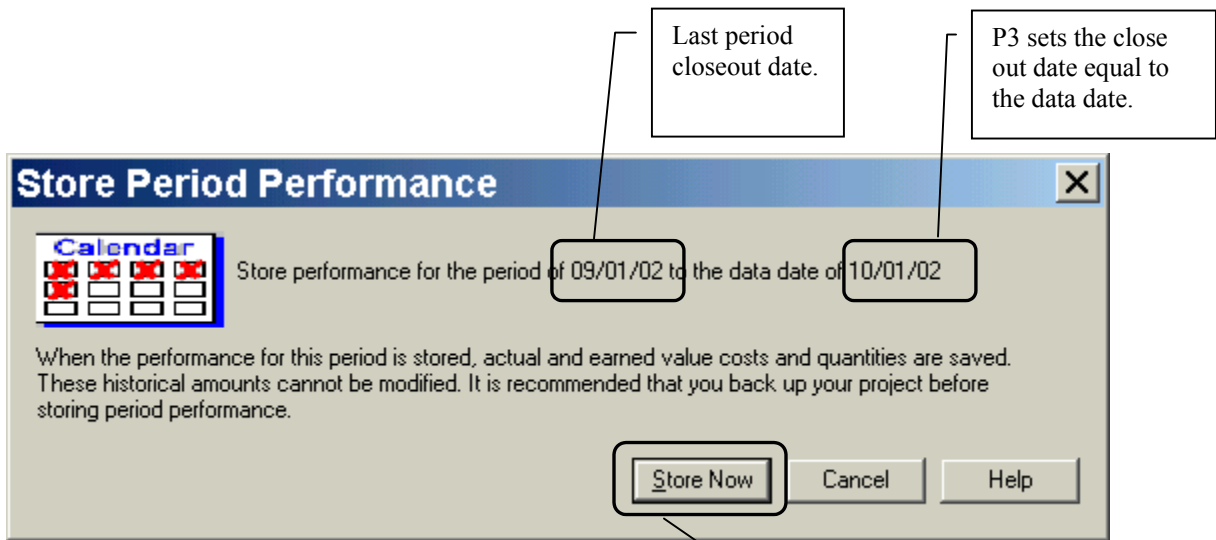


Figure 1

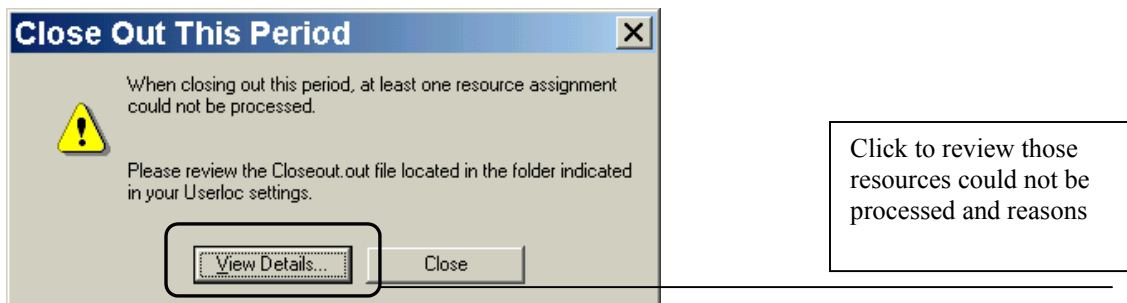


Figure 2

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- Once you store period performance without any error messages, you may review historical actual costs or quantities for resources in the Resource Table or Profile of the WYSIWYG layout (See Figure 3). You can also choose menu option – Edit, Period Performance. See the next section for details.

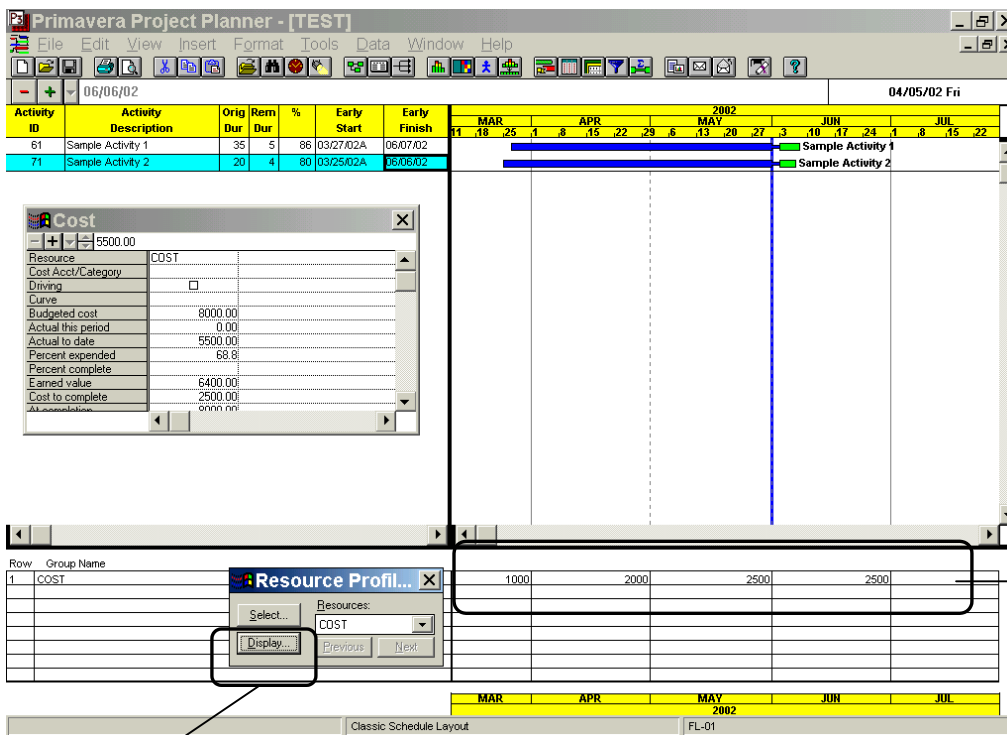


Figure 3

Note: To view the actual costs of individual activity, make sure to click on Activities, Selected in the Resource Table Display Option dialog window (See Figure 4). Click on Activities, All to show resource or cost information for all activities in current filter of the layout.

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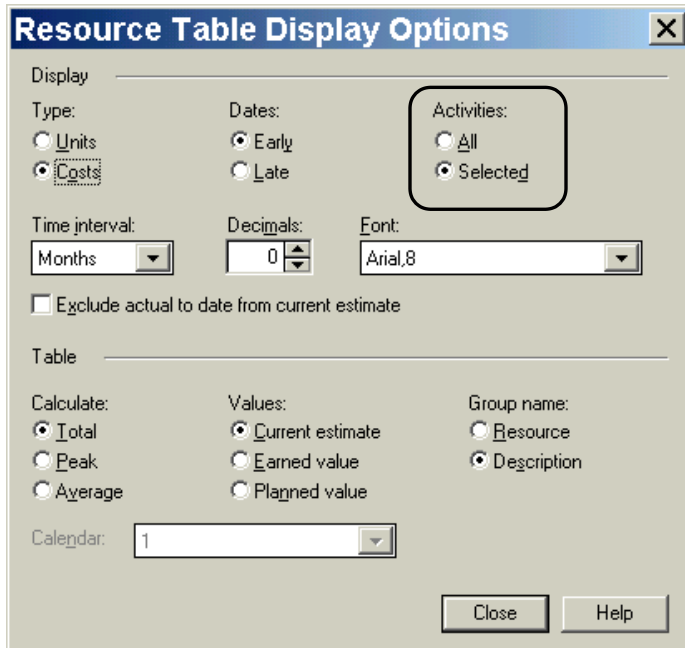


Figure 4

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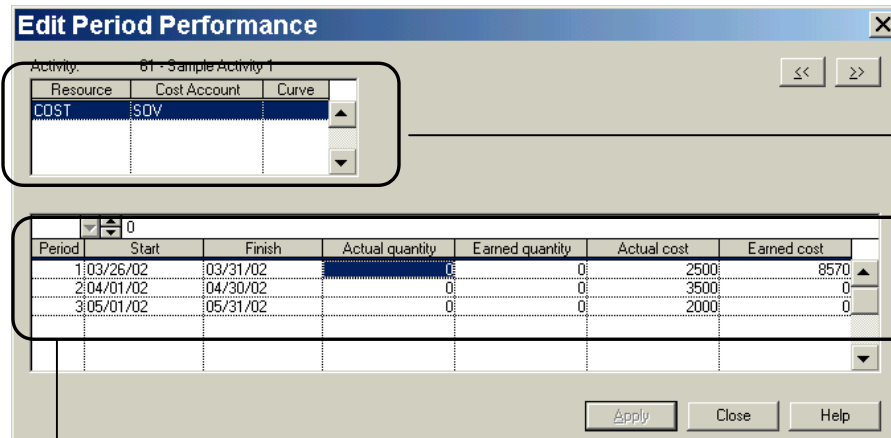
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Edit the Period Performance Data

1. To edit the period performance data, first, you select the activity that you want to view or edit. Then, choose menu option - Edit, Period Performance (**See Figure 5**).



This read-only table displays the resources, cost accounts, and curves assigned to the selected activity. Select individual resource first to display respective actual data at the bottom table.

Figure 5

Period: Lists each period stored in the PPA file.

Start/Finish: Display the start or finish dates of the period stored for the selected resource.

Actual quantity/cost: Display the actual quantity or cost of the period stored for the selected resource.

Earned quantity/cost: Display the earned quantity or cost of the period stored for the selected resource.

Note: Although you can only edit the values of Actual quantity, Actual cost, Earned quantity, and Earned cost. You can't add any new entry for the new period or the start/Finish dates in this window.

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2. If you really made some mistakes, such as the abnormality of the time period that can't be corrected by simply changing the values of the above mentioned fields. Don't be panic yet. Simply delete the resource and restore the historical data by repeating the cycles of the schedule update calculation and storing period performance. Based on my experience, I can always correct the problems without affecting the rest of activities.

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Print the Period Performance Data

1. To print the period performance data, first, you may print them out through the WYSIWYG layout, which has been explained already. Secondly, you may print them out through the traditional Tabular/Graphic reports. I often call them as “DOS” reports since they are carried over from the DOS version of P3.
2. You may use the Tabular report – Resource/Cost Loading reports by choosing menu option – Tools, Tabular Reports, Resource (or Cost), Loading to print out the tabular listing of resource or cost by time period for selected resources, and cost accounts. This printout will be similar to the look of Resource Table of WYSIWYG layout. See below for the example. If you are not familiar with the operations, please refer to P3 Reference Manual for more details.

PRIMAVERA PROJECT PLANNER							
REPORT DATE 15APR03 26MAR02	RUN NO. 91 FIN DATE 28JUN02	COST LOADING REPORT				START DATE	
13:03						DATA DATE	
01JUN02		TOTAL USAGE FOR MONTH				PAGE NO. 1	
Cost Loading - Summary by Cost Account							
ACT ID	DESC	TOTAL	MAR 2002	APR 2002	MAY 2002	JUN 2002	JUL 2002
COST - ()							
61	Sample Activity 1	10000	2500	3500	2000	2000	
71	Sample Activity 2	8000	1000	2000	2500	2500	
TOTAL	COST	18000	3500	5500	4500	4500	
	REPORT TOTAL	18000	3500	5500	4500	4500	

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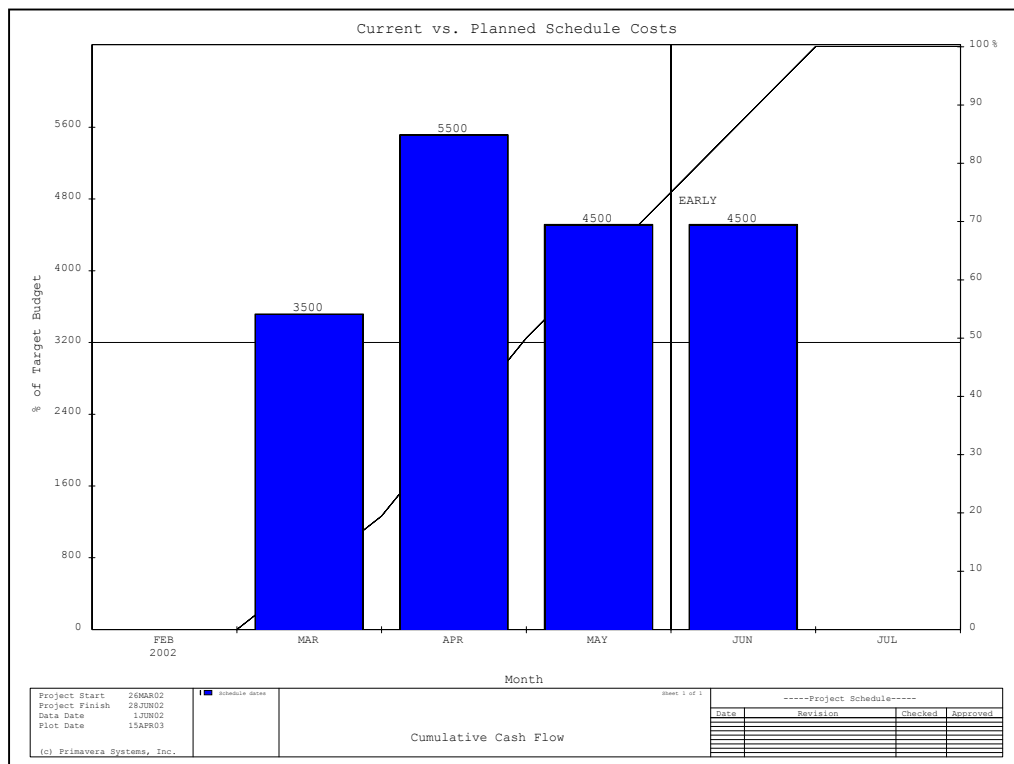
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- You may use the Graphic report – Resource/Cost Graphics by choosing menu option – Tools, Graphic Reports, Resource/Cost Graphics to print out the profiles and histograms of resource or cost by time period for selected resources, and cost accounts. This printout will be similar to the look of Resource Profile of WYSIWYG layout. See below for the example. If you are not familiar with the operations, please refer to P3 Reference Manual for more details.



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Final Words

1. To store period performance successfully every time throughout the course of the project required great attentions to each detail. However, when there is a need to review the historical actual data, all the efforts can be very rewarding.
2. The feature of the Store Period Performance is very useful in helping the Contractor to compile the Payment Request. Store Period Performance Data can freeze the actual cost to the last pay period. However, in the practical world, the cycles of approving contractor's pay request and schedule updates may not be synchronized enough to take advantage of the feature of Store Period Performance. In that case, the old method of Import/Export is still an alternative way to manage the task, which exports approved Cost to Date data from the previous schedule to an Custom Data Item (served as Actual cost to the last pay period) of the current schedule, and executes a Global Change to calculate the Actual This Period data.