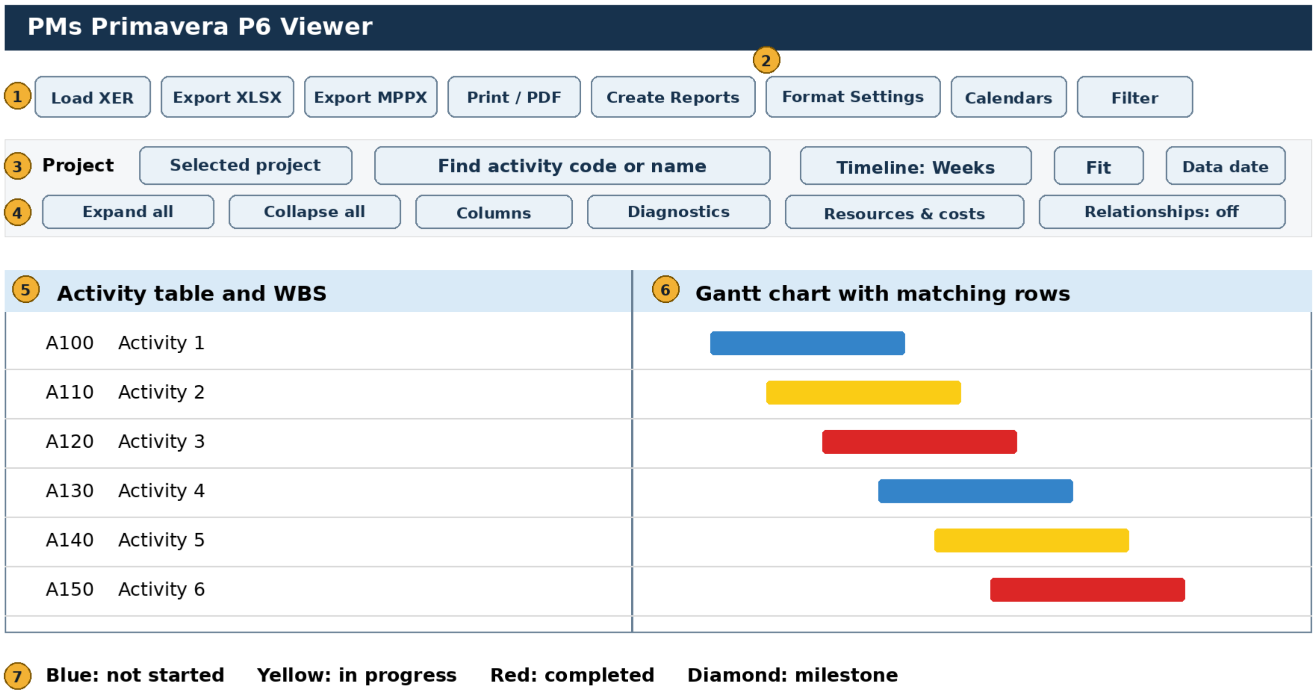
Primavera P6 Viewer First Time User Guide

Version 2.1.2

Opening an XER schedule, navigating the synchronized activity and Gantt panes, reviewing resources and costs, and exporting results



Quick start: Load XER → choose project → review schedule → filter and format → export

This edition covers the 19 schedule reports and wider two-condition Filter dialog. Interface figures are annotated diagrams; report rows shown in Figure 5 are examples.

1 Getting started

The PMS Primavera P6 Viewer opens P6 XER files directly in a web browser. It reads and displays exported schedule values; it does not recalculate dates, logic, resource leveling, or the critical path. The supplied application parses your selected XER in the browser; it does not upload the file to a server.

Minimum workflow

1. Open the viewer — Use a current desktop browser. A wide screen is recommended for the split schedule view.

2. Load a schedule — Select Load XER and choose a .xer file, or select a bundled sample project.

3. Choose the project — If the XER contains more than one project, use the Project list. The project with the most activities opens by default.

4. Check diagnostics — Open Diagnostics and review warnings before relying on the display or exports.

5. Review and export — Use the table and Gantt together, then export the current view or the complete selected project as appropriate.

Loading an XER file

1. Choose the encoding first when necessary — Use Turkish Windows 1254 for older Turkish exports. Automatic decoding tries UTF 8 and then Windows 1252.

2. Select Load XER — In the Load Project window, click the file chooser and select one XER file.

3. Wait for parsing to finish — The progress indicator closes when the schedule is ready.

4. Confirm the status line — Check the project name, number of displayed activities, data date, and diagnostic count.

If activity names contain incorrect Turkish characters, reload the same file after selecting Turkish Windows 1254.

2 Main schedule screen

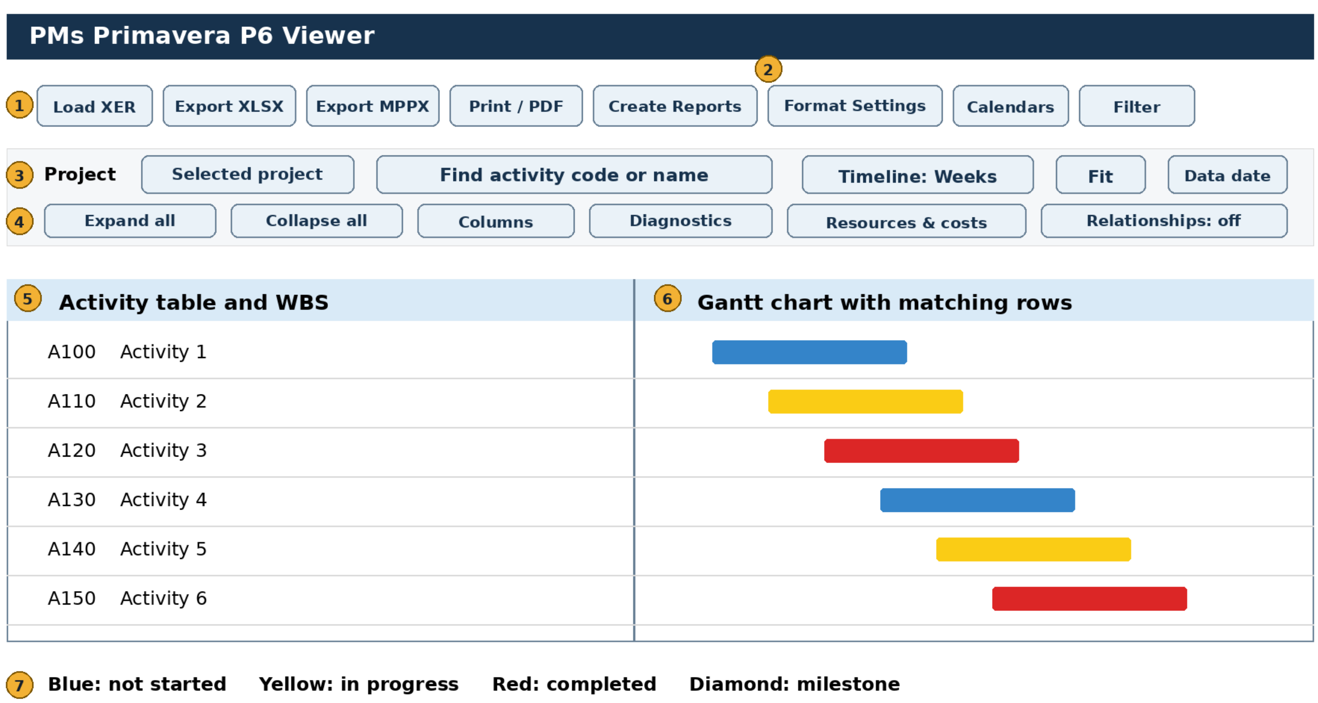


Figure 1 Main interface and principal controls

No	Area	What it does
1	Load XER and export menu	Loads an XER and provides XLSX, Project XML, PDF, report, calendar, filter, and format actions.
2	Format and review actions	Opens report creation, calendars, filters, and Format Settings.
3	Project and search controls	Selects a project in a multi project XER and searches by activity code or name.
4	Timeline and utility controls	Changes time scale, fits the schedule, centers the data date, selects columns, and opens diagnostics.
5	Activity table	Shows WBS and activity rows. Headers sort activities within their WBS group.
6	Gantt pane	Shows bars, milestones, data date, and optional relationship lines. Rows remain aligned with the table.
7	Legend and status	Explains bar status colors and displays schedule status information.

Navigating rows and time

1. Resize the two panes — Drag the center divider. Focus it and use Left or Right Arrow for small changes; Home restores the default table width.

2. Scroll through activities — Scroll vertically in either pane. The other pane follows automatically.

3. Move across columns or time — Use each pane’s own horizontal scrollbar.

4. Expand or collapse WBS — Select the arrow beside a WBS row. Hidden activities are also omitted from visible relationship lines.

5. Select an activity — Click either its table row or Gantt bar; both sides highlight together.

6. Open activity details — Double click the activity row or bar to see dates, duration, float, constraints, predecessors, and notes.

Understanding bars and date marks

Display	Default meaning
Blue bar	Not started: no valid Actual Start.
Yellow bar	In progress: Actual Start exists and Actual Finish does not.
Red bar	Completed: both Actual Start and Actual Finish exist.
Diamond	Milestone.
Vertical data date line	The exported P6 project data date.
A after a date	The displayed value is an actual date. Early or late columns may show the corresponding actual date followed by A.

3 Finding and organizing activities

Search filter and sorting

1. Quick search — Type an activity code or name in Find activity code or name. Clear the field to restore the prior view.

2. Advanced Filter — Open Filter and set the first condition. Use AND or OR to activate the second condition, then select Apply Filter. Save Filter and Load Filter reuse definitions.

3. Reset filters — Use Reset Filters when the expected activities are missing.

4. Sort — Select a column heading. Sorting applies within each contiguous WBS activity group so the WBS structure remains readable.

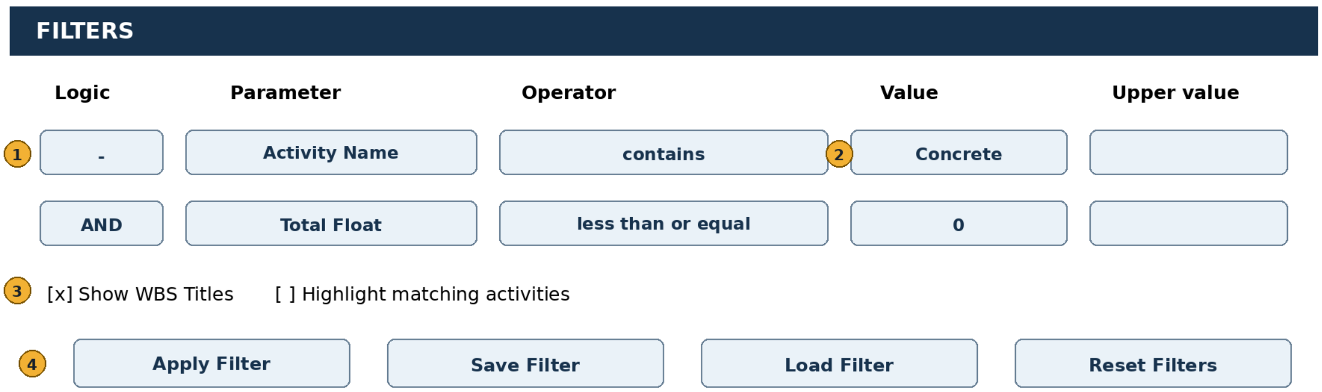


Figure 2 Wider Filter dialog with one condition per row

1 Set the first condition, then select AND or OR to use the second. Leave the second logic field as - to ignore it. 2 Enter the comparison value; use the upper value only for within Range or not within Range. 3 Show WBS Titles keeps the hierarchy; Highlight matching activities marks matches instead of restricting the list. 4 Apply Filter updates the schedule; Save Filter and Load Filter reuse your selections.

Example: Activity Name contains Concrete AND Total Float less than or equal 0 finds concrete activities with non-positive float. Float and duration inputs are in hours. The dialog expands to 1180 pixels on wide screens; on a smaller screen, scroll the condition area horizontally to reach every field. After Load Filter, choose Apply Filter.

Choosing activity columns

1. Open Columns — The left list contains available fields; the right list contains displayed fields.

2. Add or remove — Select a field and use Add or Remove.

3. Reorder — Use Up or Down to change column order.

4. Apply — Select Apply. Headers and visible rows update immediately.

5. Restore — Select Default to restore the standard column set.

4 Format settings

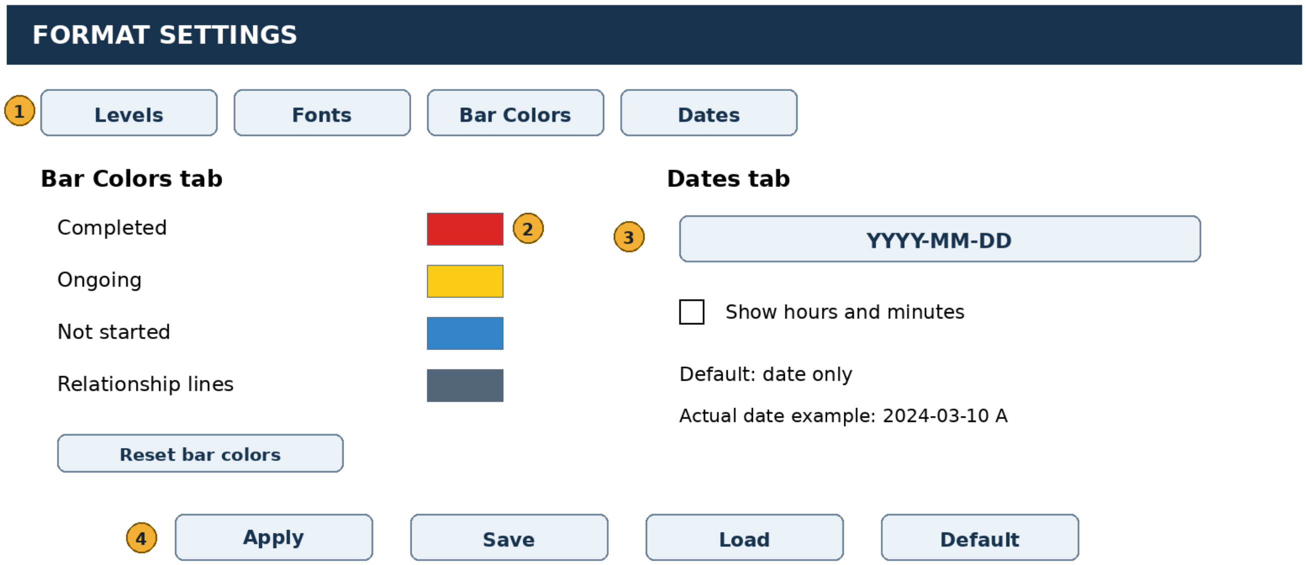


Figure 3 Format Settings tabs and shared action buttons

No	Control	Use
1	Settings tabs	Levels controls WBS appearance; Fonts controls text; Bar Colors controls schedule status and relationship colors; Dates controls date display.
2	Color controls	Choose colors for completed, in progress, not started, and relationship lines. Reset bar colors restores red, yellow, and blue in the controls.
3	Date controls	Select YYYY-MM-DD, DD/MM/YYYY, MM/DD/YYYY, or DD-MMM-YYYY. Hours and minutes are hidden by default.
4	Apply Save Load Default	Apply refreshes the current view. Save downloads settings. Load applies a saved file. Default immediately restores all format defaults.

After changing a color, select Apply to update the Gantt, legend, and applicable exports. Save the settings if the same configuration will be used again.

5 Gantt relationships

1. Turn the overlay on — Select Relationships off. The label changes to Relationships on.

2. Read the link endpoints — The viewer draws FS, SS, FF, and SF links between the corresponding activity start or finish points.

3. Change the color — Open Format Settings, select Bar Colors, choose Relationship lines, and select Apply.

4. Turn the overlay off — Select Relationships on when the chart becomes too dense.

Relationship lines appear only when both activities are visible and have valid dates. External or filtered activities are omitted. The overlay does not apply lag or change schedule dates.

6 Resources costs and cash flow

Figure 4 Resources and costs workspace

No	Area	Use
1	Workspace tabs	Switch among Resource sheet, Assignments, Usage and cash flow, and Stored actual periods.
2	Resource filter	Choose all resources or one resource. The tables, charts, and exports follow the selection.
3	Exports	Download a workbook, the current table as CSV, the chart as SVG, or print and save as PDF.
4	Chart	Review monthly or cumulative quantities and costs. Quantity units remain separate when they are incompatible.

How to review resource information

1. Open Resources and costs — The button becomes available after a project is loaded.

2. Start with Resource sheet — Review planned, actual, remaining, and at completion quantities and costs by resource.

3. Open Assignments — Trace resource totals back to activities. Dates may be marked as activity date fallbacks.

4. Open Usage and cash flow — Choose quantity or cost and monthly or cumulative presentation.

5. Check Stored actual periods — Use this tab only when the XER contains financial period records.

6. Export — Select the workbook for the broadest output or export the current table or chart for a focused result.

Important: monthly planned and remaining profiles are linear elapsed calendar time estimates. They do not reproduce P6 resource curves, working calendars, leveling, invoices, or payment terms. Costs cover resource assignments and exclude TASKEXP expenses. Stored actual periods are shown separately and are not added again to assignment actual totals.

7 Exporting and reporting

Command	Scope	Best use
Export XLSX	Current filtered sorted and expanded row list, including off screen rows	Analysis and sharing in Excel.
Export Project XML	Complete selected project regardless of filter or collapse	Transfer snapshot to Microsoft Project; validate after import and recalculation.
Export PDF	Current row list through the browser print dialog	Review copy; select paper orientation and scaling in Print.
Create Reports	Full selected project with optional unfinished-only scope; all report rows	19 reports with CSV, Excel and Print / PDF exports.
Resource workbook	All resource sheets, assignments, stored actual periods, monthly costs, and unit specific usage sheets	Detailed resource and cost review.
Resource CSV SVG PDF	Current resource table or chart	Focused downstream use or presentation.

8 Schedule reports

Create Reports opens a selectable report window. Use it to review missing links, constraints, float, durations, status and resource loading before sharing a schedule. Every report inspects the full selected project, including activities hidden by Gantt search, filters or collapsed WBS branches.

Figure 5 Report selection scope export buttons and paging

1. Select the report — Open Create Reports and use Report to choose one of the 19 entries. Results update immediately.

2. Set the scope — Unfinished only excludes records marked completed in P6 or having a valid Actual Finish. Leave it unchecked to include all activities. It can make Completed activities return no rows.

3. Set a threshold when available — High total float and Long original duration show Threshold (hours). Enter a non-negative number; results must exceed it. The initial value is 352 h. Project summary uses 352 h for these two counts, independently of changes made in the detailed reports.

4. Review every page — The preview shows 100 rows per page. Previous and Next change the page. No matching activities means no rows meet the rule; an unavailable message means required data is missing.

5. Export the results — Export CSV, Export Excel and Print / PDF include every result row, not just the preview page. The output includes the report rule and scope. Report Excel sheets retain numeric fields; dates are formatted text using the selected date settings.

Example review: choose Activities with no successors, inspect the listed activity codes, then switch to Constrained activities to see primary and secondary constraint codes and dates. A legitimate project finish milestone may have no successor; an open end is a review item, not automatically an error.

Report reference

Report	What is included
Project summary	Activity and status counts, report counts, WBS, relationships and diagnostics.
Activities with no successors	No outgoing link recorded in the XER.
Activities with no predecessors	No incoming link recorded in the XER.
Activities with no relationships	Neither incoming nor outgoing links recorded.
Constrained activities	Any primary or secondary constraint; both codes and dates are shown.
Mandatory constraints	Primary or secondary Mandatory Start or Mandatory Finish.
Unfinished activities with float ≤ 0	Unfinished activities with exported total float at or below zero hours.
Negative total float	Exported total float below zero hours.
High total float	Exported total float above the selected threshold in hours.
Long original duration	Exported original duration above the selected threshold in hours.
Milestones	Start and finish milestones.
Not-started activities	P6 status is Not started.
In-progress activities	P6 status is In progress.
Completed activities	P6 status is Completed.
Activities with positive relationship lag	Activities at either end of a link with lag greater than zero.
Activities with negative lag (leads)	Activities at either end of a link with negative lag.
Activities with non-FS relationships	Activities at either end of an SS, FF or SF link.
Activities without resource assignments	No assignment row recorded for the activity.
Actual dates after the data date	Actual Start or Actual Finish later than the exported data date.

Interpretation: blank or invalid numeric values are excluded from float and duration checks. Relationship reports count external links when they are present in the XER, unlike the visible Gantt overlay. Missing exported links cannot be reconstructed. Assignment omissions may reflect export settings, and future-actual checks require a valid data date. These reports read exported values; they do not recalculate a critical or longest path.

9 Frequently asked questions

Use these answers when the schedule or an export does not look as expected. Start with Diagnostics because it identifies missing references and import warnings.

Q1 Why does nothing appear after I select a file?

Answer The file may still be parsing, may not be a valid XER export, or may contain records the viewer cannot associate with the selected project.

What to do

- Confirm that the filename ends in .xer.
- Wait for the parsing progress indicator to close.
- Open Diagnostics and review every warning.
- If the XER contains several projects, select the intended project.

Q2 Why are Turkish characters displayed incorrectly?

Answer The file was probably exported with a legacy Turkish character encoding instead of UTF 8.

What to do

- Select Turkish Windows 1254 in File encoding.
- Reload the same XER file.

Q3 Why are some activities missing?

Answer A search, filter, collapsed WBS branch, or different project selection can remove activities from the visible row list.

What to do

- Clear the quick search field.
- Open Filter and select Reset Filters.
- Expand the relevant WBS rows.
- Confirm the selected project and compare the displayed activity count with the status line.

Q4 Why can I not see relationship lines?

Answer Relationship lines are off by default and are drawn only when both linked activities are visible and have valid dates.

What to do

- Select Relationships off to change it to Relationships on.
- Clear filters and expand the relevant WBS branches.
- Check Diagnostics for missing or external relationship references.

Q5 Why is the Resources and costs window empty?

Answer The selected project may not contain resource assignments, or the XER may omit the required resource tables.

What to do

- Confirm that the correct project is selected.
- Open Diagnostics and check which resource records were loaded.
- If necessary, export a new XER from P6 with resource and assignment data included.

Q6 Why does the cash flow differ from Primavera P6?

Answer The viewer linearly phases planned and remaining assignment totals across elapsed calendar time. It does not reproduce P6 calendars, resource curves, leveling, invoices, or payment terms.

What to do

- Check whether assignment dates fell back to activity dates.
- Review quantity units and unphased amounts.
- Compare Stored actual periods separately.
- Remember that TASKEXP expenses are excluded from resource assignment costs.

Q7 Why is my PDF clipped or difficult to read?

Answer The PDF uses the browser print dialog, so the result depends on the selected paper, orientation, margins, and scale.

What to do

- Choose landscape orientation.
- Reduce the print scale or select Fit to page.
- Choose a larger paper size when the visible schedule is very wide.

Q8 Why does the Project XML look different after Microsoft Project imports it?

Answer Microsoft Project may recalculate the imported schedule and may interpret calendars, constraints, and unsupported P6 fields differently.

What to do

- Review the companion export notes.
- Compare calendars, constraints, relationship types, and omitted external links.
- Validate dates and logic after import and recalculation before using the result.

Q9 Why does a report list activities hidden in the Gantt?

Answer Reports inspect the full selected project independently of Gantt search, filters and WBS collapse.

What to do

- Confirm the Project selection and the report scope.
- Use Unfinished only if the review should exclude completed work.

Q10 Why does the report export contain more rows than the preview?

Answer The preview displays up to 100 rows per page. CSV, Excel and Print / PDF include all matching rows.

What to do

- Use Previous and Next to review the remaining pages.
- Check the matching activity count before exporting.

Q11 Does an activity without a successor always indicate an error?

Answer No. A project finish milestone can legitimately have no successor. Also, an XER can omit links that exist in the source schedule.

What to do

- Review whether the activity is an intended project endpoint.
- Check whether external links were included in the P6 export.

Q12 Why is a report empty or marked unavailable?

Answer No matching activities means the rule returned zero rows. Unavailable means the check needs data that was not exported, such as a valid data date.

What to do

- Check Unfinished only and any threshold value.
- For resource reports, check whether assignment rows were exported.
- Review the message beside the results before interpreting zero as a clean schedule.

Q13 Why do I still see the old Reports window?

Answer The browser may be using older files, or the v2.1.2 package may not yet have been uploaded to that installation.

What to do

- Ask the site administrator to install the complete v2.1.2 package.
- Reload with Ctrl+F5 after deployment.

10 Recommended first review checklist

- Correct project selected
- Data date is plausible
- Diagnostics reviewed
- WBS and activity count checked
- Date format and hours preference set
- Status colors understood
- Filters cleared or intentionally applied
- Relationship overlay set as needed
- Resource totals and phasing notes reviewed when applicable
- Schedule reports reviewed and thresholds checked
- Report scope and unfinished-only setting confirmed
- Export scope matches the intended use