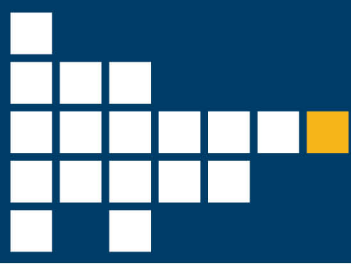




TECH TIP



AUGUST 2019 ORACLE PRIMAVERA UNIFIER SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

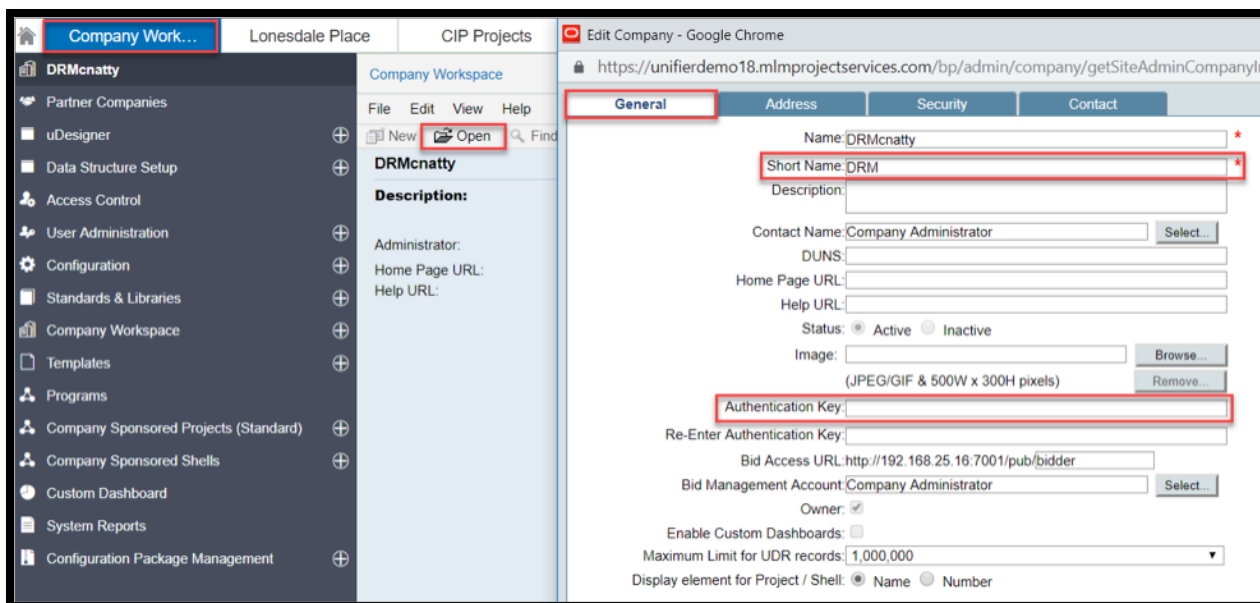
As a Unifier administrator or developer, you may have the following questions in system design:

- How do I connect Unifier and P6 out of the box configurations?
- How do I create a Schedule Sheet in Unifier?
- How do I Send P6 Schedule Data to the Unifier Schedule Sheet from P6?

In today's topic, we are going to explore these items and give you recommendations on how, where & when to use these design features in Unifier development and design.

Set Up the Unifier & P6 Connections

In Unifier navigate to **Company Workspace > Admin mode > click on Open > On the General tab > record the Short Name and Authentication Key**



SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

Navigate to P6 EPPM login & go to the Administration Tab

Within the User interface, navigate to **Administration > General**

- Enter in your P6 URL, Primavera Unifier URL, Company Short Name from Unifier & Authentication Code from Unifier > click "Save and Close" when finished.

The screenshot shows the P6 EPPM Administration interface. The 'Administration' tab is selected in the top navigation. The 'General' section is active in the left sidebar. The 'General' settings include: Starting Day of Week (Sunday), Activity Duration (5.0d), Codes (Code separator character: -), Industry Selection, and Password Policy (Enabled). The 'Document Management' section has a 'P6 URL' field. The 'Unifier' section has fields for 'Primavera Unifier URL', 'Company Short Name' (with a note 'At most 255 characters long'), and 'Authentication Code'. The 'Save and Close' button is highlighted with a red box.

In P6 EPPM go to the Projects Tab

Within the User P6 EPS, navigate to **Your P6 Project > General Tab >** and Copy your Unique **Project ID**

The screenshot shows the P6 EPS Enterprise Project Structure page. The 'Projects' tab is selected in the top navigation. The 'Enterprise Project Structure' table is visible, with the 'KANSAVE' project highlighted. The 'General' tab is selected for the project details. The 'Project ID' field is highlighted with a red box and contains the value 'KANSAVE'. Other fields include Project Name (Kansas Avenue Grade Separation), Project Status (Active), Location, Responsible Manager (Energy), and Planned Dates (Anticipated Start, Anticipated Finish, Project Planned Start).

SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

In Unifier Navigate to **Your Project** > **User Mode** > click on **Details** > **General** tab > and input your **P6 Project ID** from Project ID in P6 > click **Apply & Ok**

The screenshot shows the Unifier Project Details form for the project 'Kansas Avenue Grade Separation'. The 'General' tab is selected. The 'P6 Project ID' field is highlighted with a red box and contains the value 'KANSAVE'. Other fields include Project Name, Project Number, Status, Administrator, Hierarchy Path, Sections Phase I, Project Start Date, Project End Date, Estimated Budget, and Schedule Type. The 'Apply' and 'OK' buttons are also highlighted with red boxes.

In P6 EPPM > go to the **Projects** Tab > Navigate to your "Project" > Select **Set Project Preferences**

The screenshot shows the P6 EPPM Projects tab. The 'Kansas Avenue Grade Separation' project is selected and highlighted with a red box. The 'Set Project Preferences' option is highlighted in the context menu. The project details table is visible, showing the project name, start date, and data date.

ID	Name	Start	Data Date
GAMA	Project Gama	20-May-19 A	04-Jan-21
GAMA - B1	Project Gama - Base Cost Loaded	20-May-19	20-May-19
DELTA	Project Delta	20-May-19	20-May-19
HAYWARD	Hayward Maintenance Complex	20-May-19	20-May-19
TRANSBAY	Transbay Corridor Core Capacity	20-May-19	20-May-19
AMERAVE	American Avenue Grade Separation	08-Jan-18 A	01-Aug-19
KENAVE	Kent Avenue Grade Separation	01-Jan-18 A	01-Aug-19
PONDVIA	Pond Road Viaduct	01-Nov-18	20-May-19
FRESTREN	Fresno Trench & State Route 180 Passageway	02-Jan-18 A	01-Aug-19
KANSAVE	Kansas Avenue Grade Separation	01-Aug-18	20-May-19

Sending the P6 Schedule Data to Unifier

**** Note This Integration assumes you have beforehand created in your Unifier Project a **Schedule Sheet** and a **Data Mapping Sheet**;**

**** If you have not completed this, jump to the next steps Under > Heading: **Creating the Unifier Schedule Sheet** and its **Data Mapping Sheet****

Go to the **Integrations** Tab > Click **Unifier** > Select **Link Project to a Primavera Unifier Project** > Select your **Project Name** > select your **Schedule Sheet** > Select your **Data Mapping** > click the Box “Delete activities no Longer in the P6 Schedule from Primavera Unifier” > Click **OK**

The screenshot shows the 'Project Preferences of Kansas Avenue Grade Separation' dialog box. The 'Integrations' tab is selected, and the 'Unifier' gateway is chosen. The 'Schedule Sheet Integration' section is active, with the following settings:

- Link project to a Primavera Unifier project
- Project Name:** Kansas Avenue Grade Separation
- Schedule Sheet:** Kansas P6 Schedule
- Data Mapping:** P6 Data Mapping
- Delete activities no longer in the P6 Schedule from Primavera Unifier
- Only send activities with CBS codes assigned

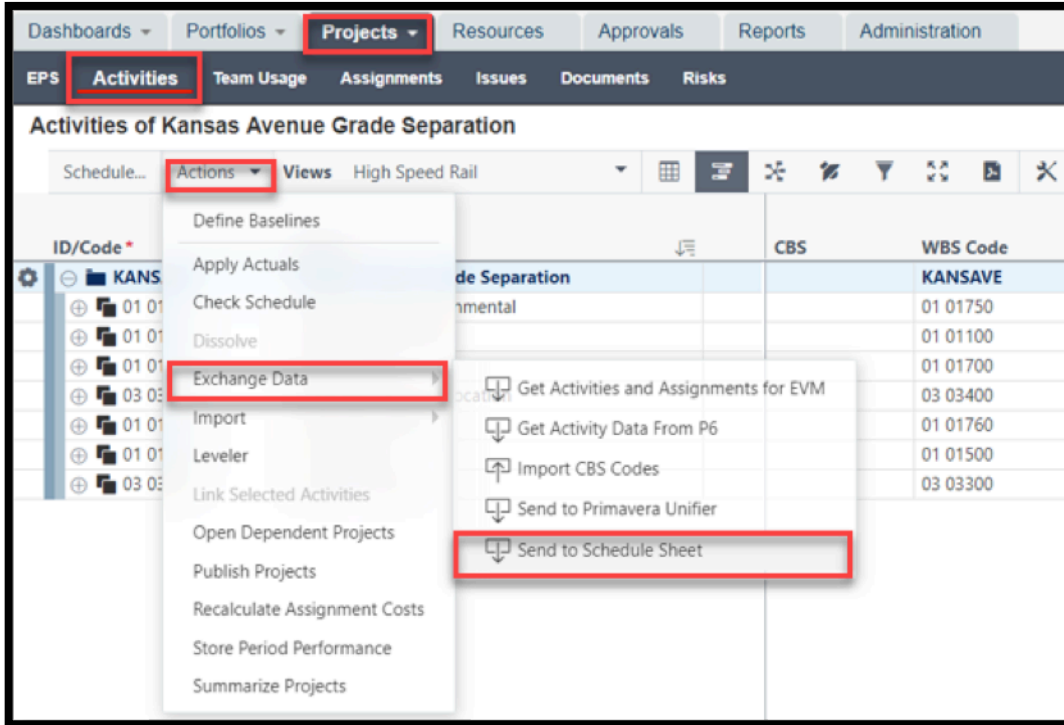
The 'Summary Sheet Integration' section is also visible, with the following settings:

- Schedule Type:** Cost Loaded
- Synchronize WBS Hierarchy
- Complete:** Complete

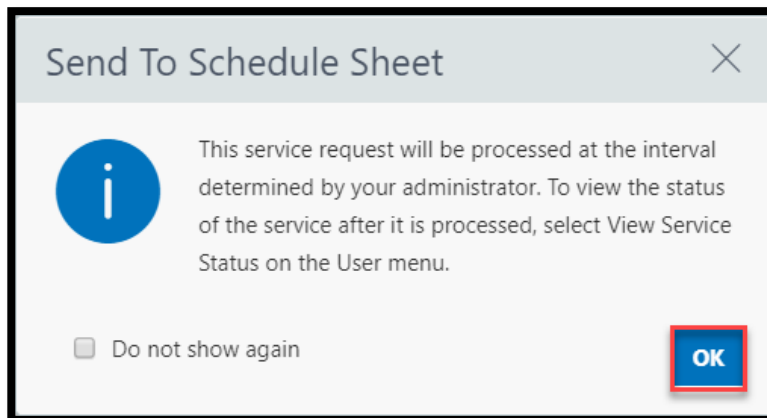
At the bottom right, there are 'Cancel' and 'OK' buttons.

SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

Next in P6 EPPM > With your “Project” Open > go to the **Activities** Tab > **Actions** > **Exchange Data** > **Send to Schedule Sheet**

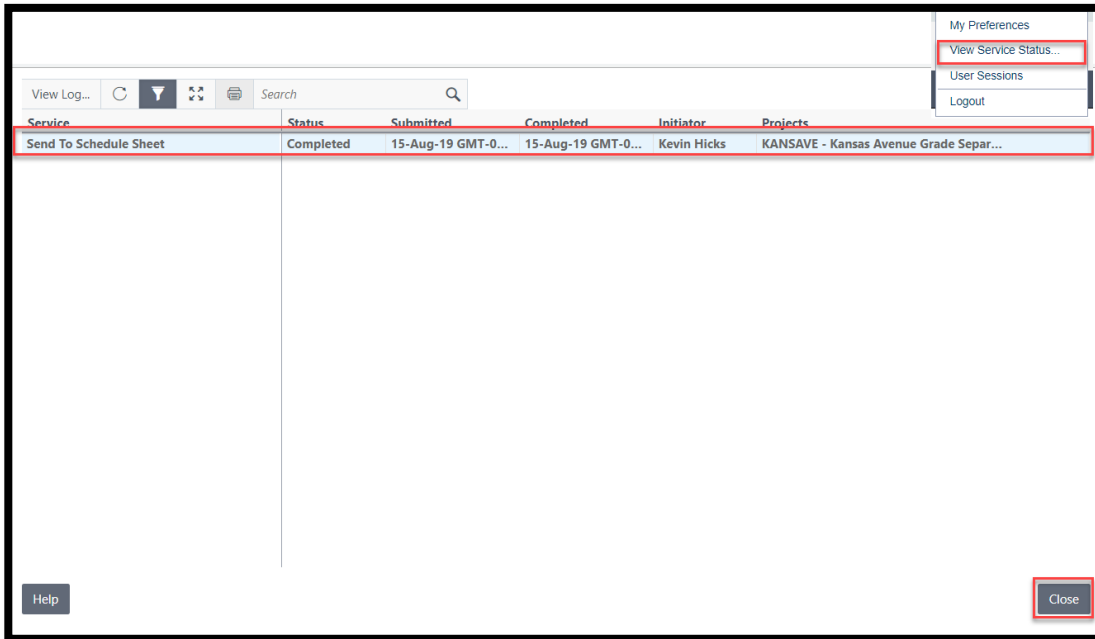


Click > OK

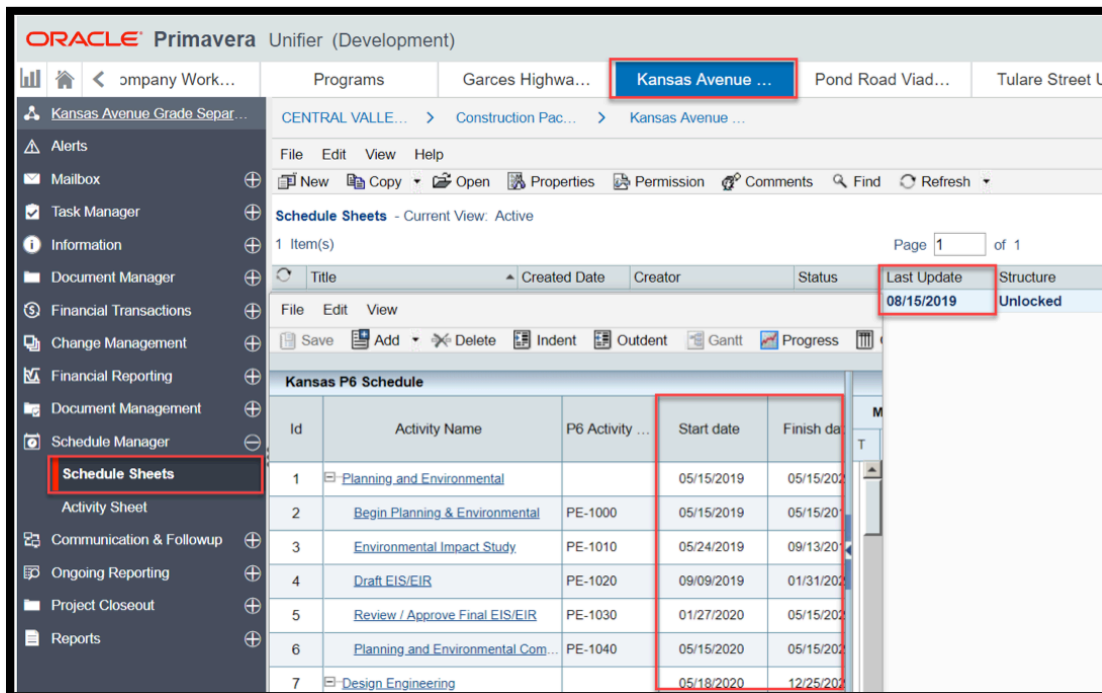


SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

Under Your Username > Select **View Service Status** > to see the completed Service > Click **Close**

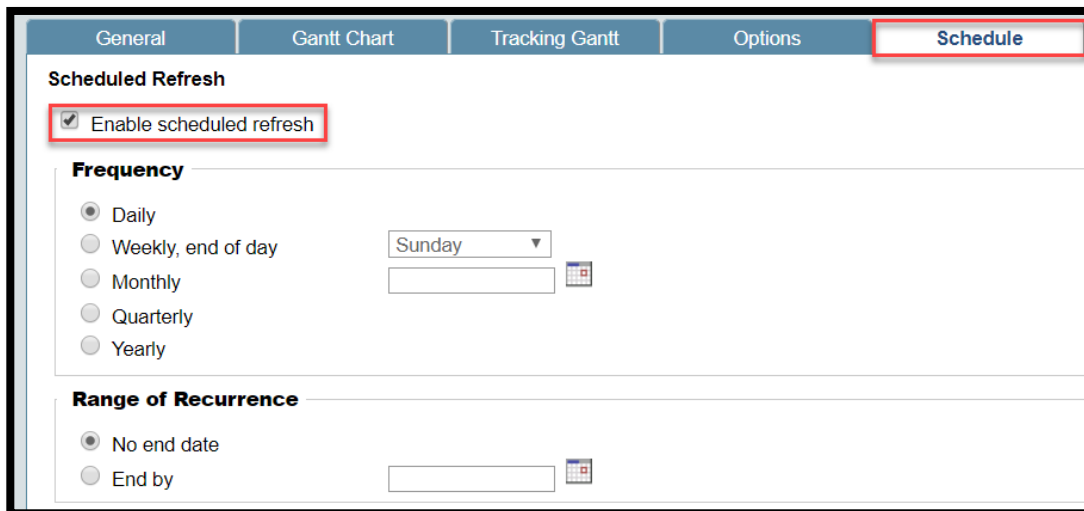
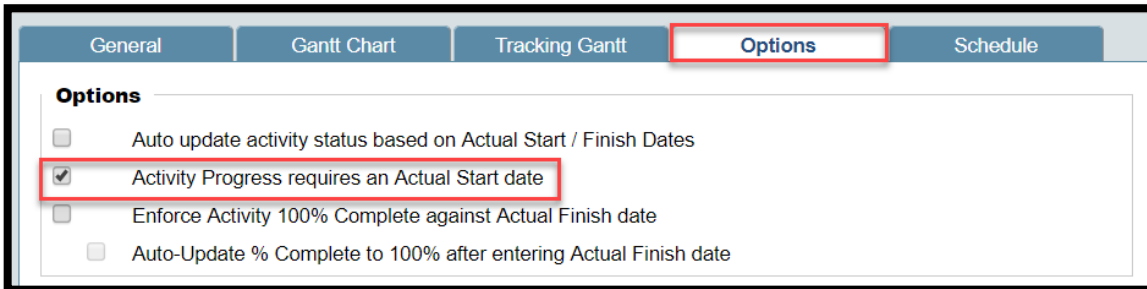
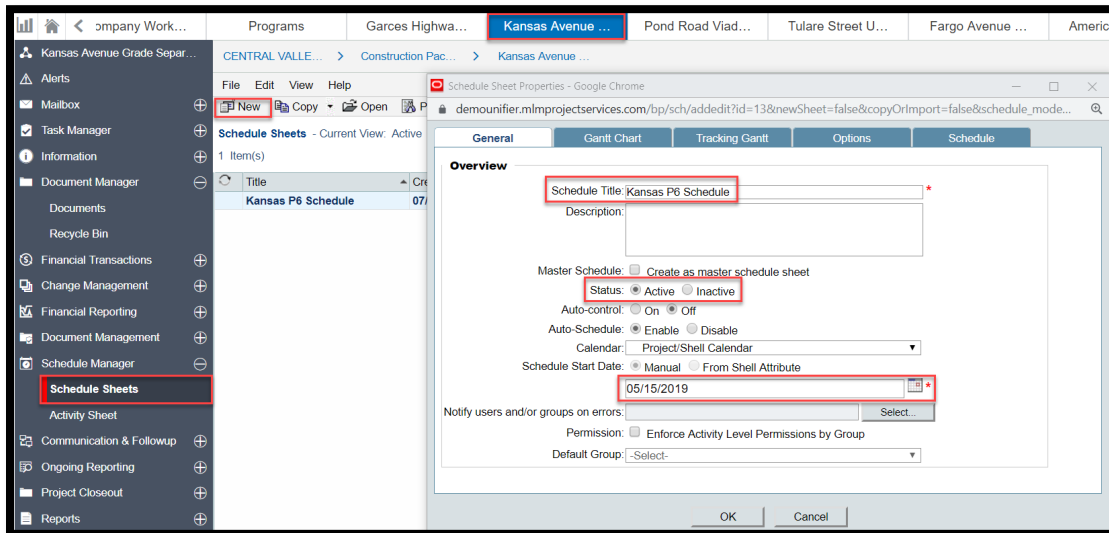


Next Navigate Back to Primavera Unifier > go to your "Project" > **Schedule Sheets** > Open and view your data and Verify your Project Schedule Sheet has been Updated



Creating the Unifier Schedule Sheet & Its Data Mapping

Follow these next Steps > In Unifier navigate to **Your Project > User Mode > click on Schedule Sheets > New > On General Tab enter in your Schedule Title > Set Status to Active > Select a Schedule Start Date > On Options Tab - Select Activity Progress requires and Actual Start Date > On Schedule Tab - Select Enable scheduled refresh > Click OK**



SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

Double Click on your Created Schedule Sheet > Click **File** > **Data Mapping**

The screenshot shows a web-based software interface. On the left is a navigation menu with 'Schedule Sheets' highlighted. The main area shows a 'Schedule Manager' window with a 'File' menu open, and 'Data Mapping' is selected. A table of schedule activities is visible in the background.

	P6 Activity ...	Start date	Finish date	
		05/15/2019	05/15/2020	
	ental PE-1000	05/15/2019	05/15/2019	
	y PE-1010	05/24/2019	09/13/2019	
	PE-1020	09/09/2019	01/31/2020	
	/EIR PE-1030	01/27/2020	05/15/2020	
	al Com... PE-1040	05/15/2020	05/15/2020	
		05/18/2020	12/25/2020	
	DE-2000	05/18/2020	05/18/2020	
9	30% Design Engineering	DE-2010	05/22/2020	07/17/2020
10	60% Design Engineering	DE-2020	07/13/2020	09/04/2020
11	90% Design Engineering	DE-2030	09/07/2020	10/30/2020
12	Final Review and Approval of De...	DE-2040	11/02/2020	12/25/2020

Click on **Add** > Name the Mapping File **"P6 Data Mapping"**

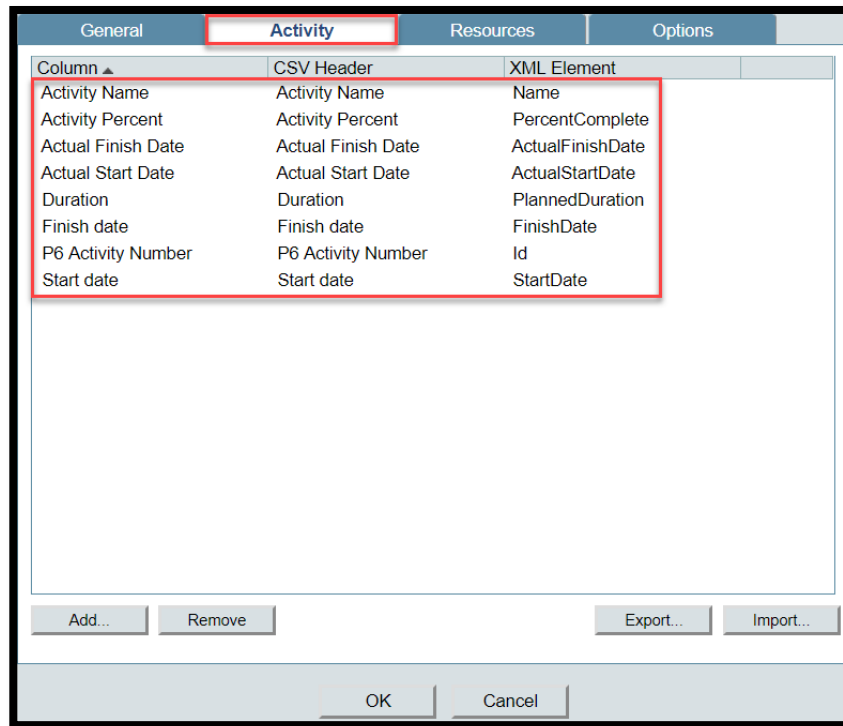
The 'Data Mappings' dialog box is shown. It has a table with two columns: 'Name' and 'Default Mapping'. The entry 'P6 Data Mapping' is present with a checked checkbox. Below the table are buttons for 'Add...', 'Modify...', and 'Remove'. The 'Add...' button is highlighted with a red box.

Name	Default Mapping
P6 Data Mapping	<input checked="" type="checkbox"/>

SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

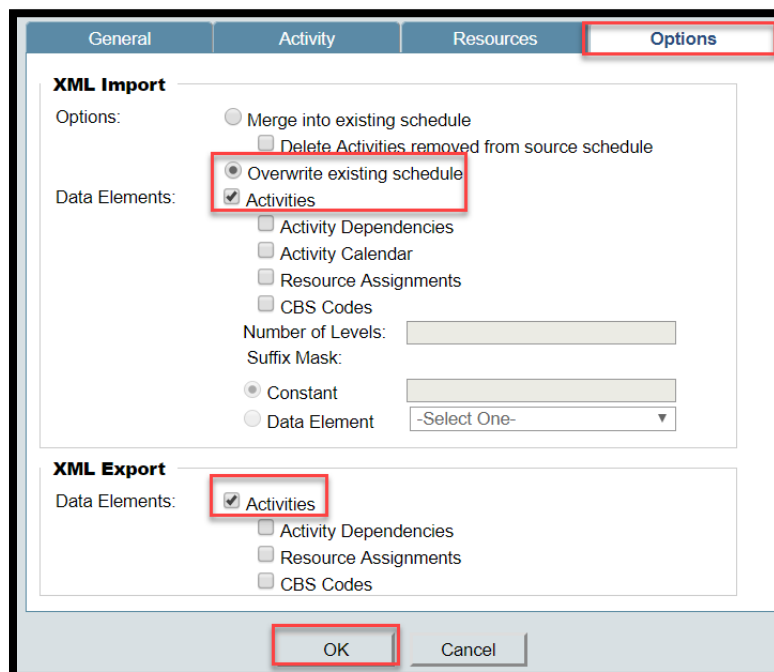
On the Activity Tab > Add these following Mapping Elements In the **CSV Header** and **XML Element** Columns

**** Pay close attention to the Case Sensitive text and word spacing**



Column	CSV Header	XML Element
Activity Name	Activity Name	Name
Activity Percent	Activity Percent	PercentComplete
Actual Finish Date	Actual Finish Date	ActualFinishDate
Actual Start Date	Actual Start Date	ActualStartDate
Duration	Duration	PlannedDuration
Finish date	Finish date	FinishDate
P6 Activity Number	P6 Activity Number	Id
Start date	Start date	StartDate

On **Options** Tab - Select Overwrite Existing Schedule and Activities Box in both places > Click **OK**



XML Import

Options:

- Merge into existing schedule
- Delete Activities removed from source schedule
- Overwrite existing schedule

Data Elements:

- Activities
- Activity Dependencies
- Activity Calendar
- Resource Assignments
- CBS Codes

Number of Levels:

Suffix Mask:

- Constant
- Data Element

XML Export

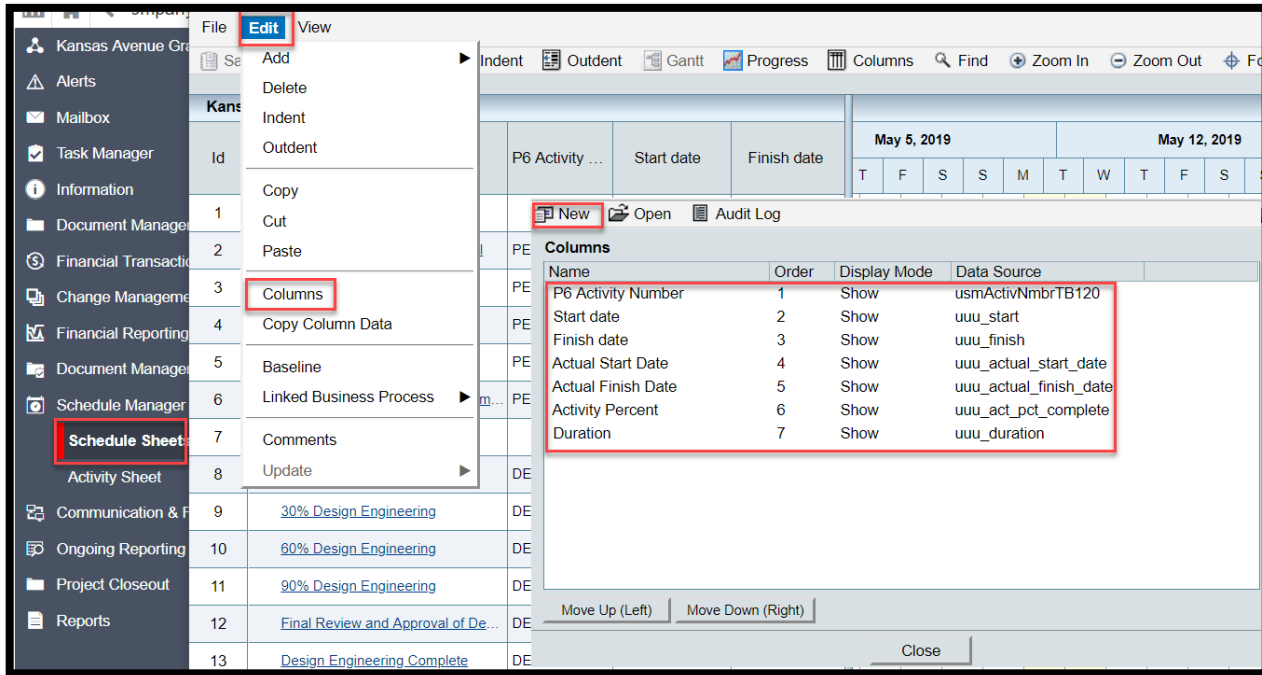
Data Elements:

- Activities
- Activity Dependencies
- Resource Assignments
- CBS Codes

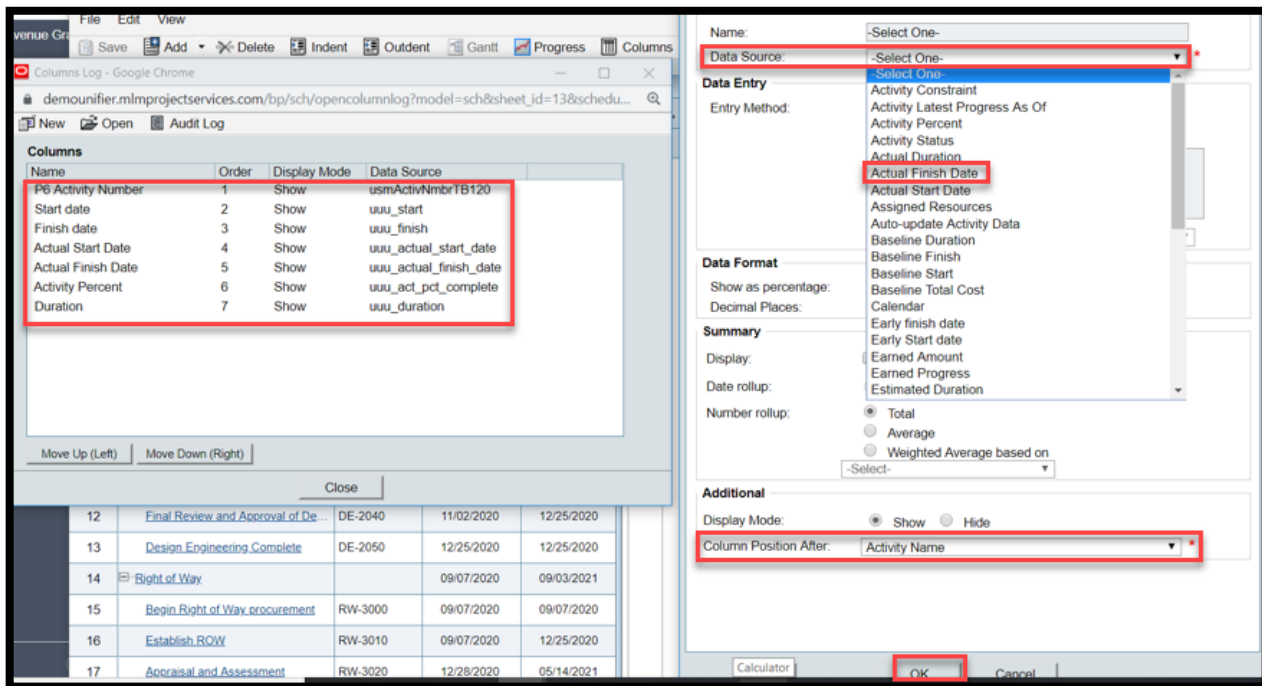
OK Cancel

SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

Next Open your P6 Schedule Sheet > Click **Edit** > Select **Columns** > Click **New** >

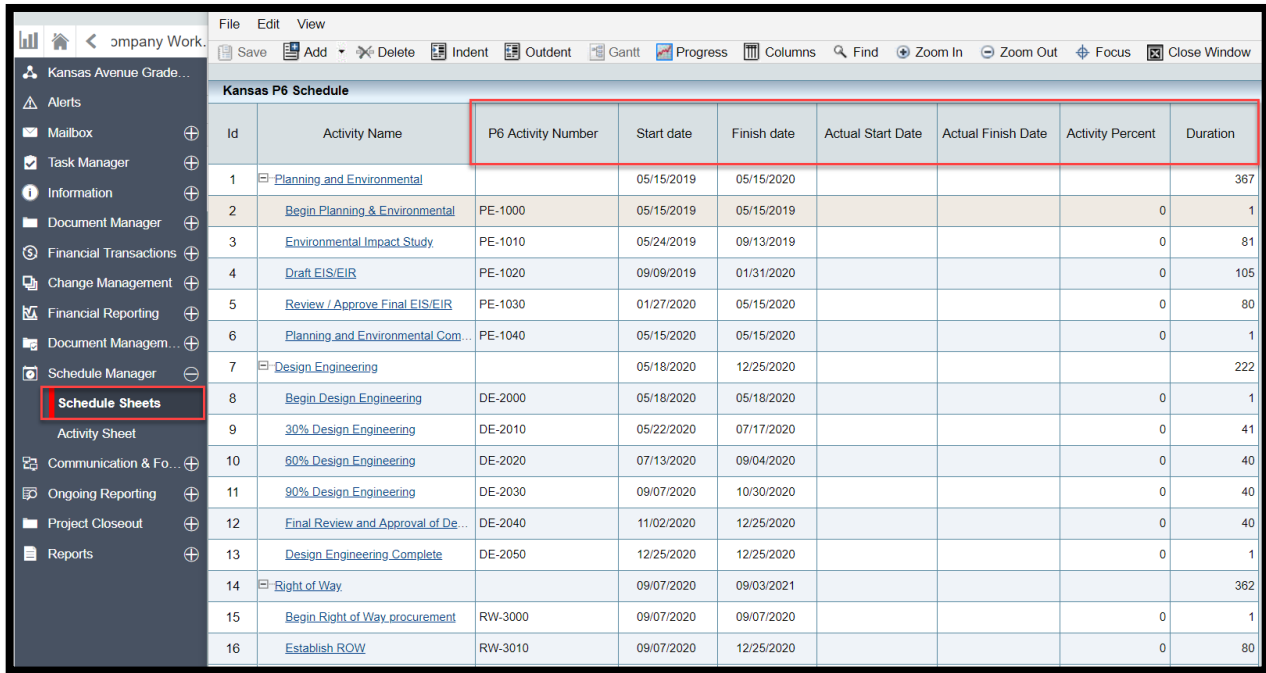


Select Your Column **Data Source** from the Dropdown Menu > Set the **Column Position After** > All columns in the Screen Shot > when finished click **OK**



SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

When you return to the Schedule Sheet, you will now see your columns mapped to P6 data in your Unifier Schedule Sheet.



Id	Activity Name	P6 Activity Number	Start date	Finish date	Actual Start Date	Actual Finish Date	Activity Percent	Duration
1	Planning and Environmental		05/15/2019	05/15/2020				367
2	Begin Planning & Environmental	PE-1000	05/15/2019	05/15/2019			0	1
3	Environmental Impact Study	PE-1010	05/24/2019	09/13/2019			0	81
4	Draft EIS/EIR	PE-1020	09/09/2019	01/31/2020			0	105
5	Review / Approve Final EIS/EIR	PE-1030	01/27/2020	05/15/2020			0	80
6	Planning and Environmental Com...	PE-1040	05/15/2020	05/15/2020			0	1
7	Design Engineering		05/18/2020	12/25/2020				222
8	Begin Design Engineering	DE-2000	05/18/2020	05/18/2020			0	1
9	30% Design Engineering	DE-2010	05/22/2020	07/17/2020			0	41
10	60% Design Engineering	DE-2020	07/13/2020	09/04/2020			0	40
11	90% Design Engineering	DE-2030	09/07/2020	10/30/2020			0	40
12	Final Review and Approval of De...	DE-2040	11/02/2020	12/25/2020			0	40
13	Design Engineering Complete	DE-2050	12/25/2020	12/25/2020			0	1
14	Right of Way		09/07/2020	09/03/2021				362
15	Begin Right of Way procurement	RW-3000	09/07/2020	09/07/2020			0	1
16	Establish ROW	RW-3010	09/07/2020	12/25/2020			0	80

Summary

Using Unifier's out-of-the-box built in integration to P6 is one of the most efficient ways to manage and provide schedule visibility to users working in Unifier projects with P6 schedule components/needs. Schedule data being updated in P6 can be transferred to Unifier as long as you understand some of the aspects of its use and how it impacts your projects.