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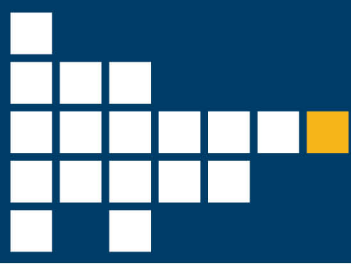## AUGUST 2019
ORACLE PRIMAVERA UNIFIER
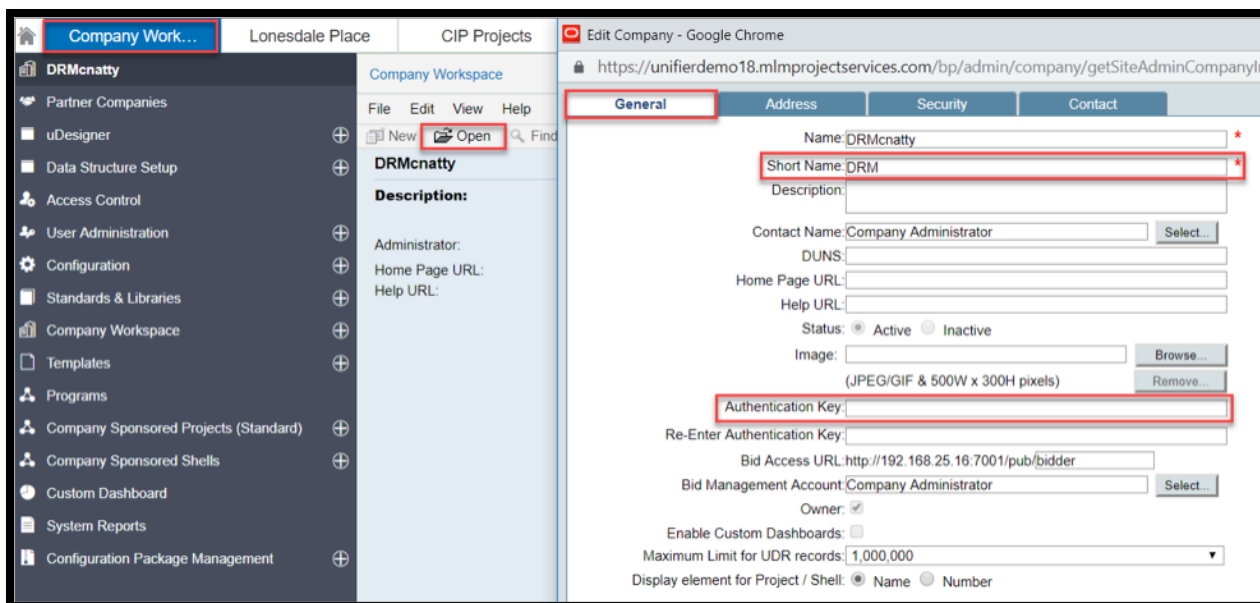## SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

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**

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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.

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**

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**

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

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**

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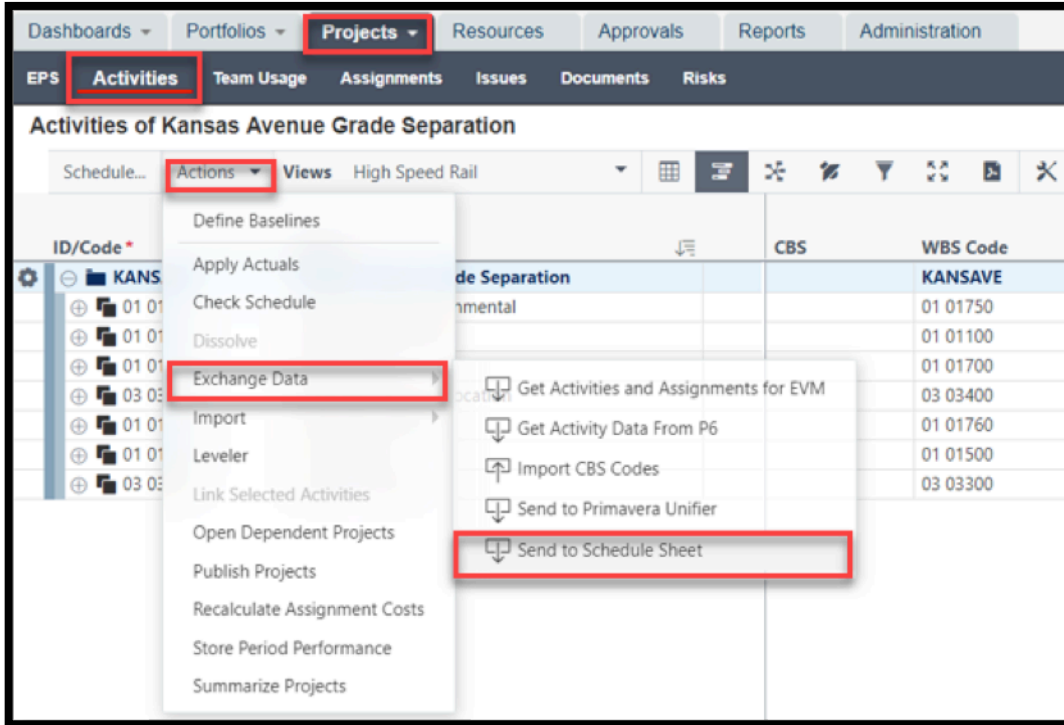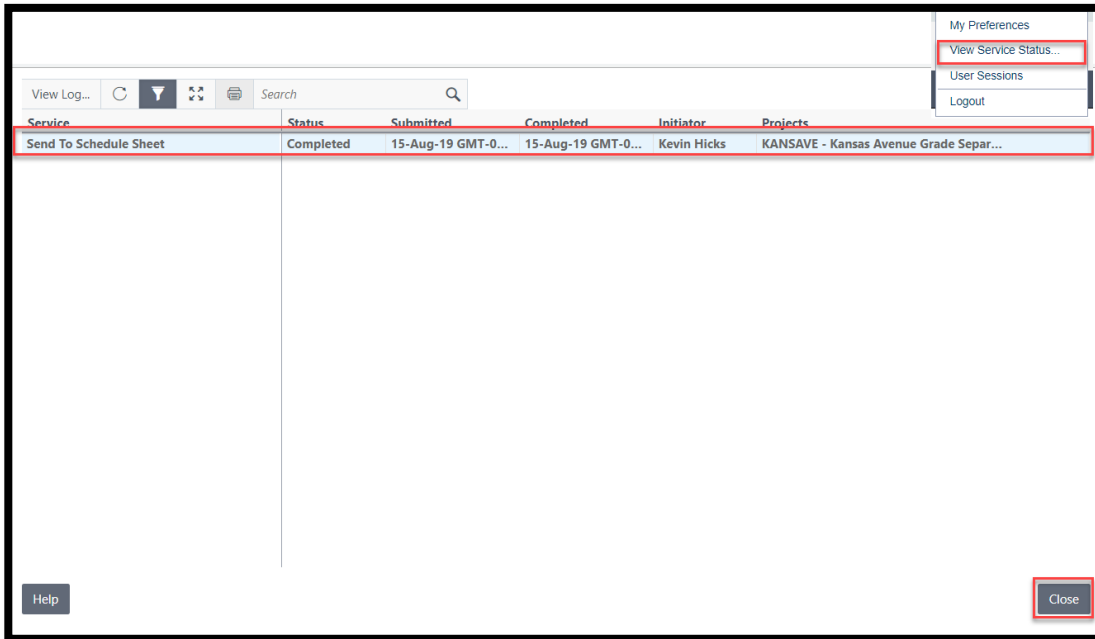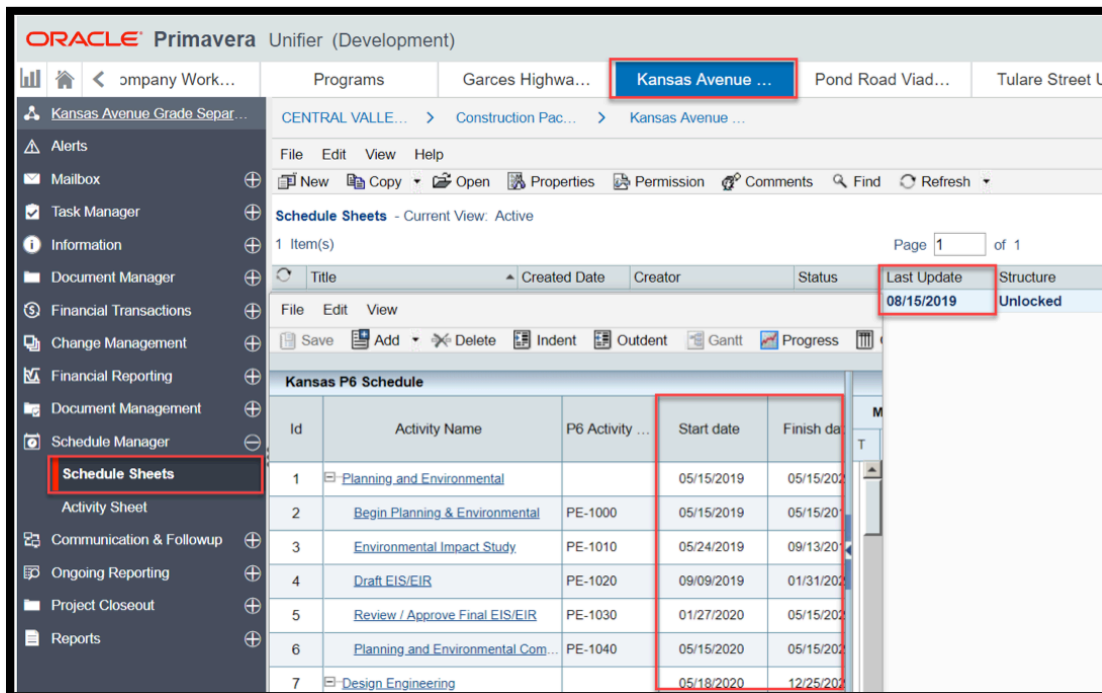

Click > **OK**
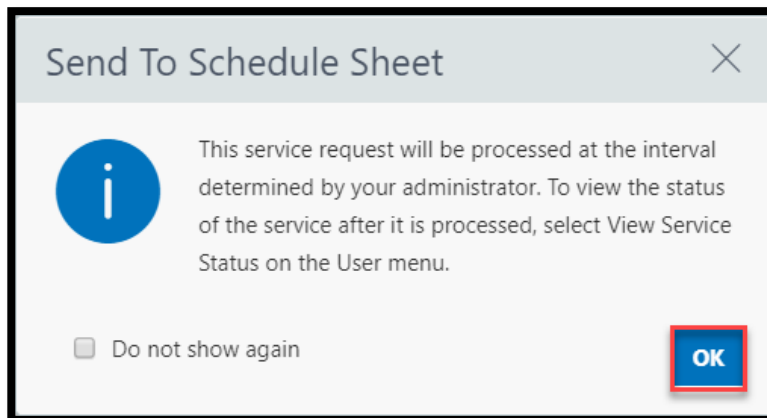
Under Your Username > Select **View Service Status** > to see the completed Service > Click **Close**
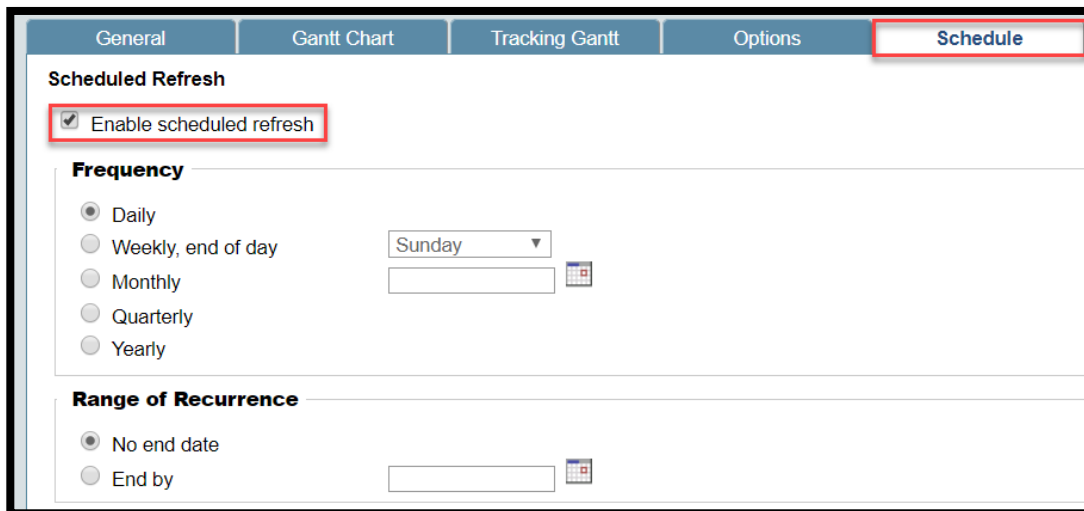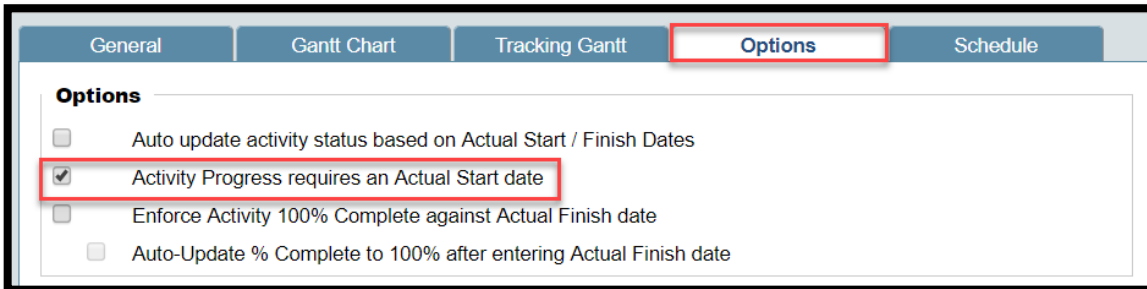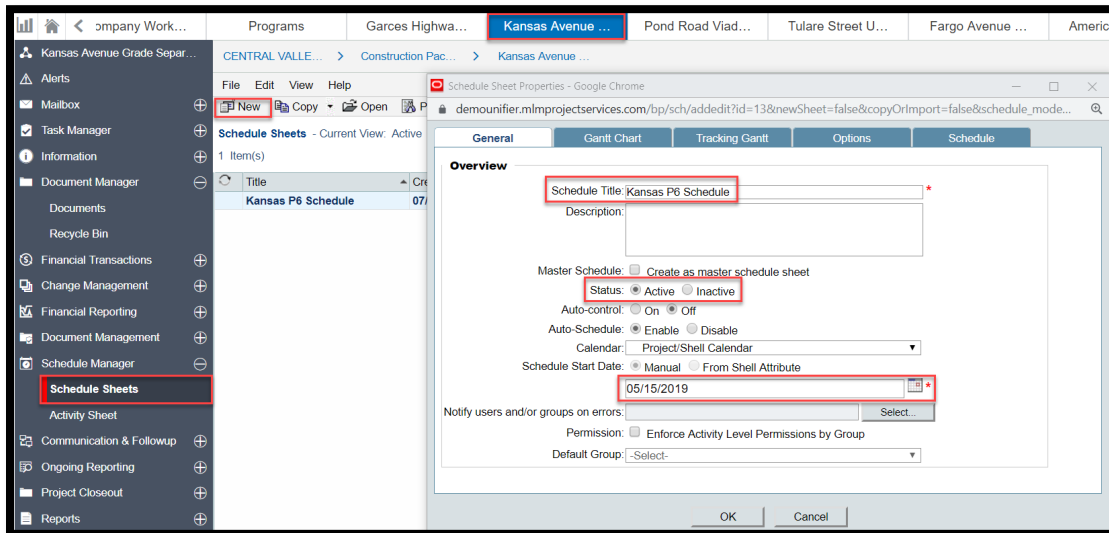

Next Navigate Back to Primavera Unifier > go to your "Project" > **Schedule Sheets** > Open and view your data and Verify your Project Schedule Sheet has been Updated

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**

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

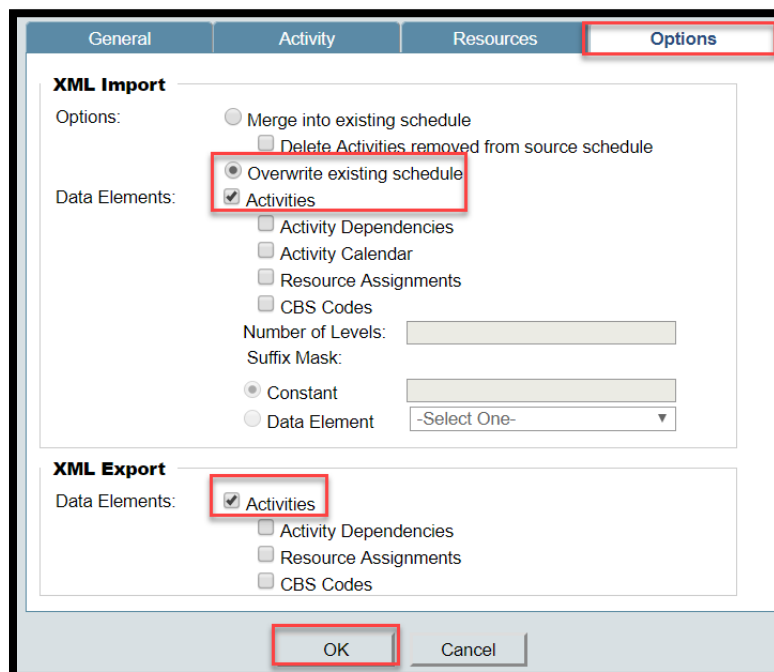Click on **Add >** Name the Mapping File **"P6 Data Mapping"**
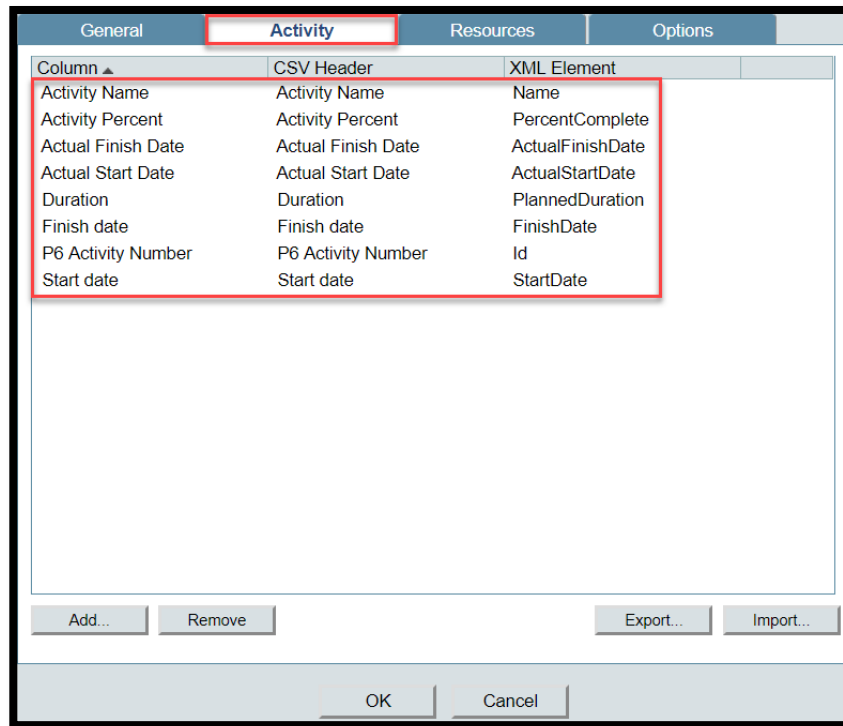
On the Activity Tab > Add these following Mapping Elements In the **CVS Header** and **XML Element** Columns
** Pay close attention to the Case Sensitive text and word spacing

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

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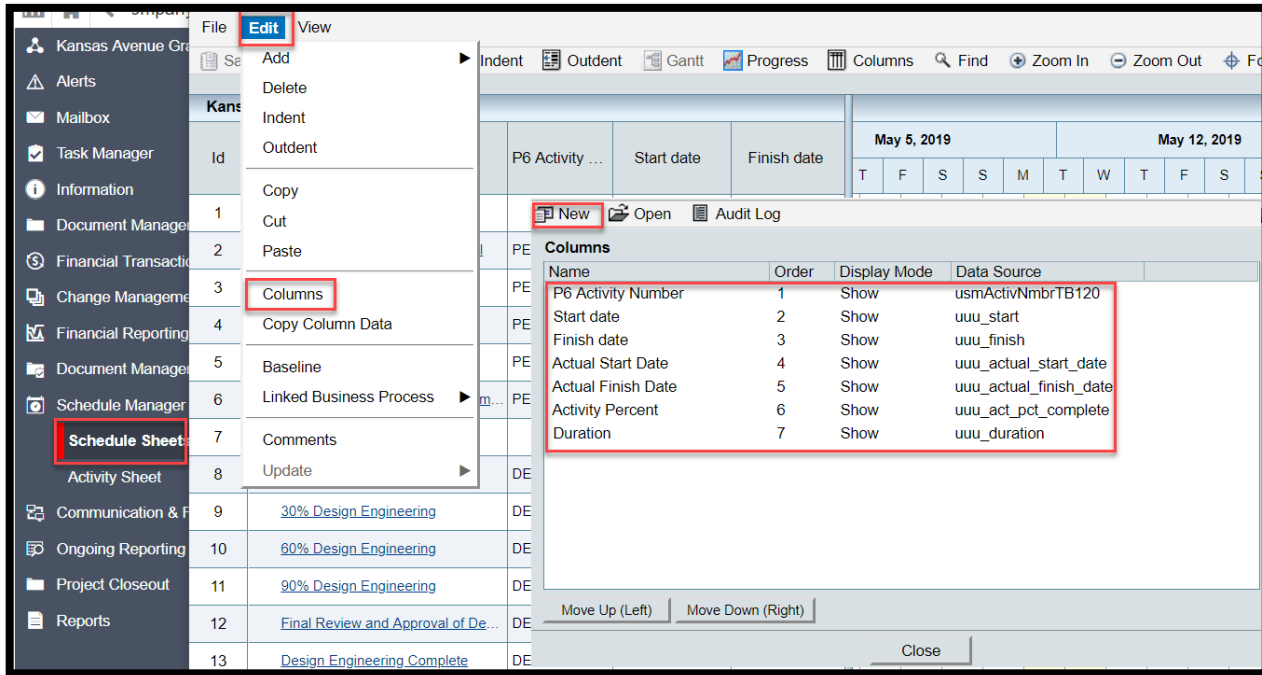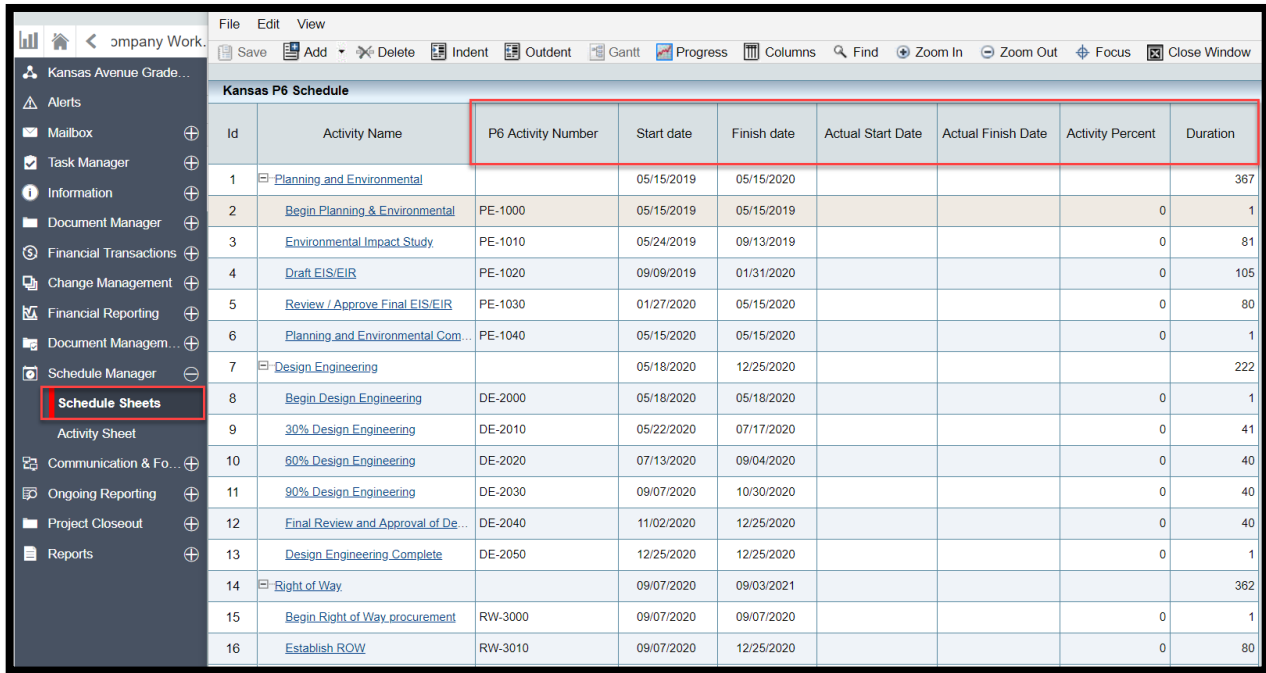

Select Your Column **Data Source** from the Dropdown Menu **>** Set the **Column Position After** > All columns in the Screen Shot > when finished click **OK**
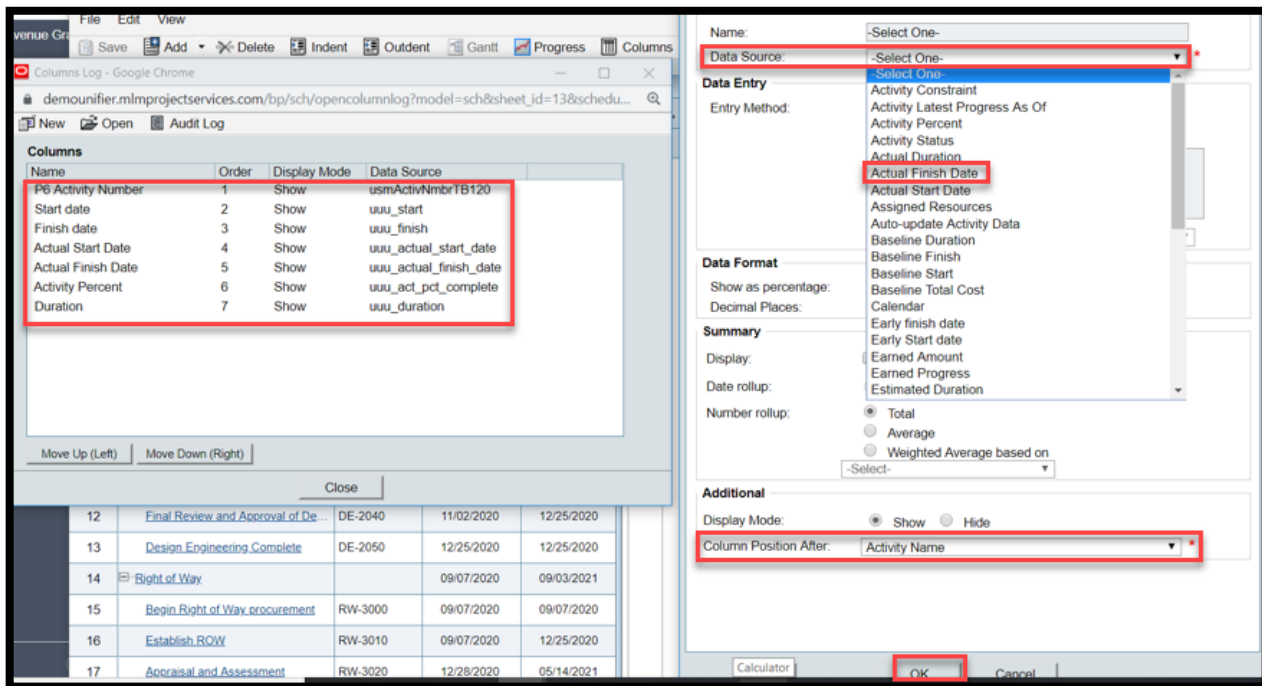
When you return to the Schedule Sheet, you will now see your columns mapped to P6 data in your Unifier Schedule Sheet.

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.