

# TECH TIP

## MAY 2020 BI PUBLISHER AND ORACLE PRIMAVERA P6 AVOIDING IMPORT OF RISK CATEGORIES

When using P6, a common task is the sharing of schedules to others using XER or XML export files. If the export is taken from a P6 instance that uses Risks, then XER files will automatically export ALL "Risk Categories" and gives you no option to exclude them.

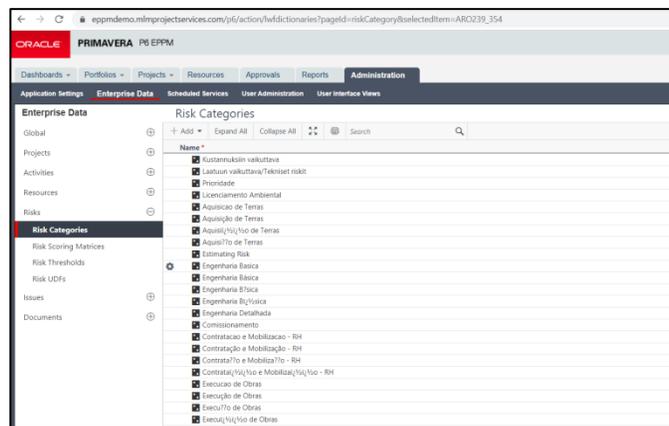
This creates two issues:

1. The XER file becomes much larger than it should be
2. The XER file will import all the Risk Categories into your database, polluting your database. These categories import even if the project exported has no risks, but the database it's from does. And of course, then if you export one of your projects, it will also spread these Risk Categories to others.

If you are using the P6 Professional interface and don't ever use Risks, this will have a low impact on your P6 usage. However, it can impact your performance in P6 EPPM, and certainly will impact you if you do use the Risks component.

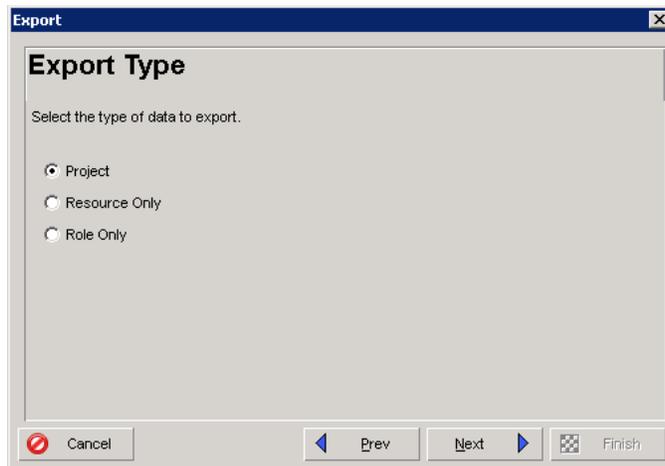
### Illustration of the issue

After importing a project XER from another user, the database is now populated with many spurious risk categories:

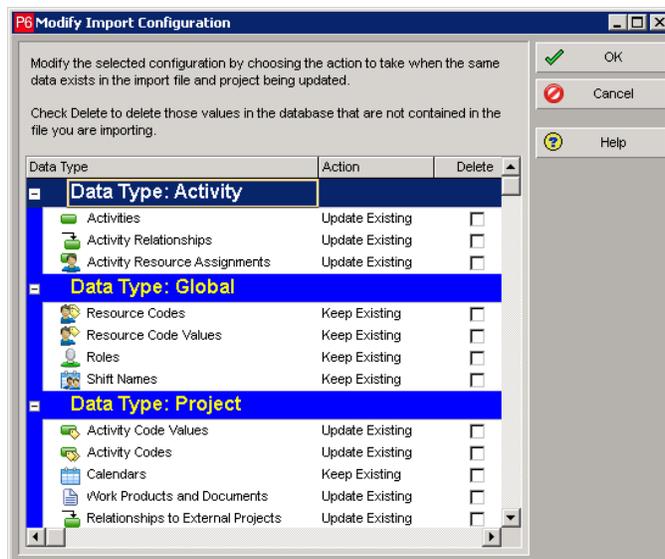


# AVOIDING IMPORT OF RISK CATEGORIES

There is no option during XER export to EXCLUDE Risk Categories (even with XML export there is no option to exclude certain items):



There is no option to EXCLUDE Risk Categories in P6 Professional:



## HOW TO FIX THIS

There are a couple of different options you can use to fix this:

1. Use a special P6 login account that has only "Project Superuser" but no Global Privileges when Importing projects. This also prevents any other Global data changes from happening (global calendars, resources, project/resource/global activity codes, etc). The problem with this is people never remember to use the special P6 login when they are importing. They usually import as an Admin Superuser.

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## 2. Hand-edit the XER file one of two ways.

### XER Parser Tool

You can do this using an XER parser. The one that Oracle provides in their knowledgebase stopped working some versions ago. A consulting firm Aegis has updated it to work in newer versions. You can find it here:

<https://www.consultaegis.com/technology/free-utilities/>

It uses Macro-Enabled Excel to read an XER and takes each data type and puts them on separate Excel worktabs. You can then edit them (making sure not to break unique identifiers) and then re-export it XER. The advantage of this is being able to decide exactly what you want in the XER file.

### Manual Hand Edit to XER using Notepad++

Or you can do this manually using Notepad++ to edit because it has a lot more options than regular Notepad.

You would open the .XER and then search for RISKTYPE. You could then manually remove all the Risk Categories that get included in the file. This would be all the %R lines below the %T and %F lines (you can remove the %T and %F lines as well, but removing all the %R lines only until the next %T line also works.)

```
31 NR 104 2 441 General & Accounting
32 NR 107 10004 PEPS Personal Time
33 NT 085
34 NF obs_id parent_obs_id guid seq_num obs_name obs_desc
35 NR 565 0 Enterprise <RTEL><BODY></BODY></RTEL>
36 NR 1567 563 <RTEL><BODY></BODY></RTEL> 411 Transportation
37 NT 836777
38 NF risk_type_id seq_num risk_type parent_risk_type_id
39 NR 102 10005 Requirement Changes
40 NR 105 10005 Schedule
41 NR 121 75006 System Performance
42 NR 122 10003 Public Relations
43 NR 123 10004 Project Facilities
44 NR 147 75016 Weather/Environmental Hazards
45 NR 150 10006 Personnel
46 NR 151 20005 Staffing
47 NR 182 10000 Funding
48 NR 183 10002 Government/Regulatory Compliance
49 NR 155 10001 Budget
50 NR 156 75106 Safety
51 NR 144 75206 Building Permits 153
52 NR 145 75106 Environmental Permits 153
53 NR 174 30006 Support & Funding
54 NR 177 50006 Technology Integration
55 NR 178 10002 New Requirements
56 NR 182 20005 Supplier
57 NR 194 20000 Financial
58 NR 187 76011 Prioritization
59 NR 188 50001 Estimating
60 NR 189 75501 Technology
61 NR 190 75601 Performance & Reliability
62 NR 191 76001 Requirements
63 NR 192 40001 Project Dependencies
64 NR 194 75511 Complexity & Interfaces
65 NR 195 76411 Subcontractors & Suppliers
66 NR 194 76001 Weather
67 NR 197 75101 Quality
68 NR 198 76211 Regulatory
69 NR 199 75201 Budget
70 NR 200 30001 Customer
71 NB 761 76001 Blanket
```

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## Another Alternative

The XML export format appears to exclude Risk Categories if none are assigned to the project. This is best done in the P6 EPPM (P6 Web) interface as the latest P6 Pro version redirects you to download the XML file from P6 Web anyways. Therefore, requesting the project backup file in XML format is a good alternative to using XER.

## Summary

Transferring/Sharing schedules is a very powerful option in P6, but care must be taken when sharing these files based on this issue with Risk Categories and the XER transfer format. Using the techniques outlined here will help you in keeping your P6 database clean and free of extra unwanted entries.