

# TECH TIP

## COPYING UNIFIER AND P6 PROJECTS AND TROUBLESHOOTING ERRORS ORACLE PRIMAVERA UNIFIER/P6

This topic will cover three areas related to Unifier and P6 projects that are integrated:

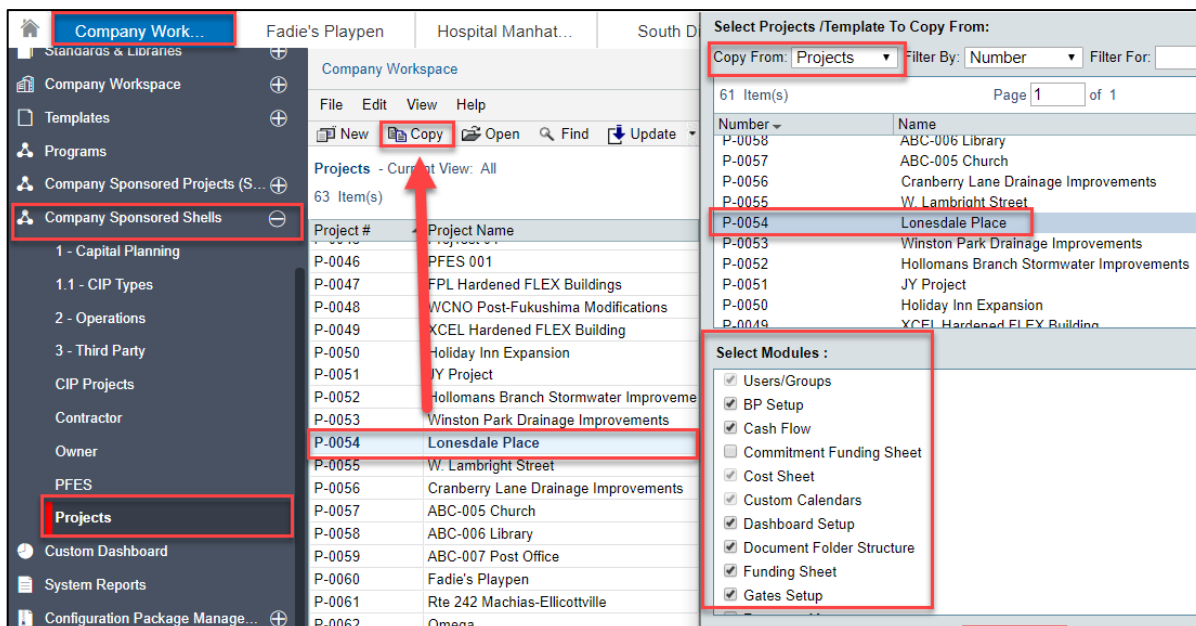
- How to copy projects in both P6 and Unifier and then how to make the connection.
- How to send P6 data to the Unifier schedule sheet from P6.
- Troubleshooting errors that might arise.

### Copy the Unifier & P6 Projects

In this section we'll outline how you copy projects in both Unifier and P6, and then how to properly set them to be linked correctly.

#### Unifier Shell Copy

Navigate in Unifier to Company Workspace > Admin mode > click on Company Sponsored Shells > Projects > select the project you want to copy Click on Copy > Choose Copy from Projects and Select the Project to copy > and select the Modules you wish to copy > click OK



# COPYING UNIFIER AND P6 PROJECTS AND TROUBLESHOOTING ERRORS

## P6 EPPM Schedule Copy

Navigate to P6 EPPM login & go to the Projects Tab

Within the User interface, navigate to EPS > Click on the Project you want to Copy >

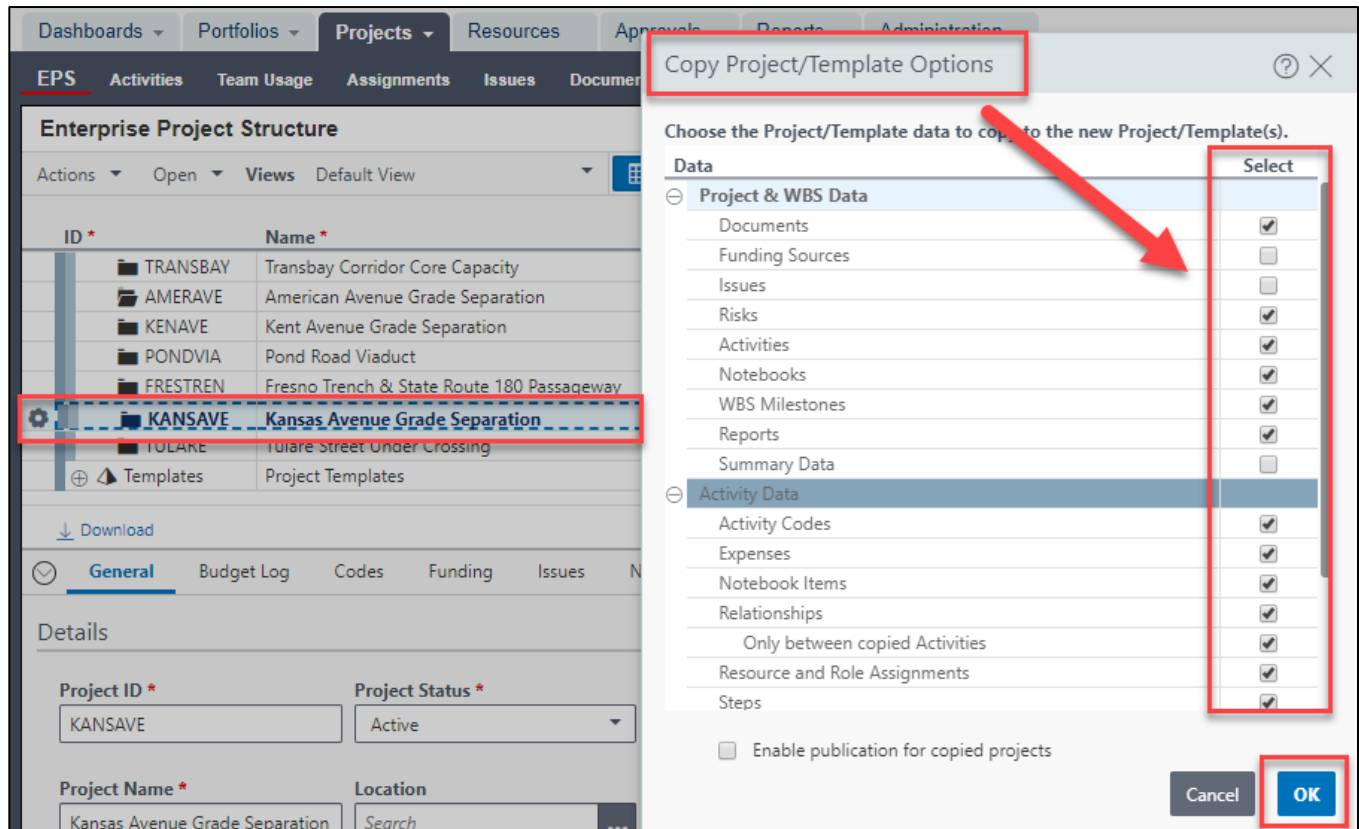
Select on the Gear Icon select Copy

The screenshot shows the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', 'Approvals', 'Reports', and 'Administration'. The 'Projects' tab is active, and the 'EPS' sub-tab is selected. The 'Enterprise Project Structure' table is displayed with columns: ID, Name, Start, Data Date, Project Owner, and Responsible Manager. The 'KANSAS' project is highlighted, and a context menu is open with the 'Copy' option selected. A red arrow points to the 'Copy' option in the menu.

ID *	Name *	Start	Data Date	Project Owner	Responsible Manager
TRANSBAY	Transbay Corridor Core Capacity	20-May-19	20-May-19		Enterprise
AMERAVE	American Avenue Grade Separation	08-Jan-18 A	01-Aug-19		Energy
KENAVE	Kent Avenue Grade Separation	01-Jan-18 A	01-Aug-19		Energy
PONDVIA	Pond Road Viaduct	01-Nov-18	20-May-19		Energy
FRESTREN	Fresno Trench & State Route 180 Passageway	02-Jan-18 A	01-Aug-19		Energy
KANSAS	Kansas Avenue Grade Separation	01-Aug-18	20-May-19		Energy
	Tulare Street Under Crossing	01-Aug-18	20-May-19		Energy
	Project Templates				Enterprise

# COPYING UNIFIER AND P6 PROJECTS AND TROUBLESHOOTING ERRORS

Select where you want to put the Project in the P6 EPS Hierarchy and click Paste,  
Select the Copy Project Options you want to copy > Click on OK



# COPYING UNIFIER AND P6 PROJECTS AND TROUBLESHOOTING ERRORS

## Linking the Unifier copied project to the P6 Copy

In Unifier go to the Project you just copied be sure to clear out the Unifier Project settings you copied in the Project Details tab.

To do this Navigate to Your Unifier Project > Details Tab > and change the Unique P6 Project ID then Copy your Unique P6 Project ID > Click Save

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar shows the project name 'Lonesdale Place' and other project names like 'Hospital Manhat...', 'South District', 'Major Neighbor...', and 'CIP Projects'. The left sidebar contains a list of modules including Alerts, Mailbox, Task Manager, Information, Document Manager, Portfolio Manager, Financial Transactions, Change Management, Financial Reporting, Submittal Manager, RFI Manager, Schedule Manager, Communication & Fo..., Ongoing Reporting, Project Closeout, and Reports. The main area shows the 'Details' tab for the 'Lonesdale Place' project. The 'General' section includes fields for Project Name (Lonesdale Place), Project Number (P-0054), P6 Project ID (LONDPLAC), Project Type (Sub-Project), Project Start Date (10/01/2013), Project End Date (11/28/2018), and Estimated Budget (0.00). The 'Status' is set to 'Active', and the 'Administrator' is 'Company Administrator'. The 'Hierarchy Path' is '/CIP Projects (Enterprise)/Public Works (PW)/Stor...'. The 'Schedule Type' is 'Cost Loaded'. The 'Cancel' and 'Save' buttons are at the bottom right. A red arrow points from the 'P6 Project ID' field to the 'Details' tab in the right sidebar.

# COPYING UNIFIER AND P6 PROJECTS AND TROUBLESHOOTING ERRORS

## Linking the P6 copied schedule to the Unifier Copy

In P6 EPPM go to the Projects Tab

Within the User P6 EPS, navigate to your new copied P6 Project > Projects Tab > EPS > General and copy your New Unique Project ID from Unifier into the Field. \*\* The case sensitive words must match exactly \*\* > Click Save

The screenshot displays the P6 EPPM interface. At the top, the 'Projects' tab is selected in the main navigation bar. Below this, the 'EPS' sub-tab is active. The 'Enterprise Project Structure' table lists various projects. The project 'LONDPLAC' (Lonesdale Place) is highlighted with a red box. Below the table, the 'General' tab is selected, showing fields for project configuration. The 'Project ID' field is highlighted with a red box and contains the value 'LONDPLAC'. Other fields include 'Project Status' (Active), 'Anticipated Start', 'Actual Start', 'Project Name' (Lonesdale Place), 'Location' (DRM Offices), 'Anticipated Finish', and 'Actual Finish'. A 'Save' button is visible in the top right corner of the interface.

ID *	Name *	Start	Finish	Project Manager	Estimated Project Size
31021020	R4 G CAP NEW MAIN POKER, SAC	02-Jan-12 12:0...		Clark, A	
31023557	R4E 3RD AVENUE GPRP PART 2OF2, WOODLAND	31-Oct-12 12:0...		Clark, A	
31028263	R4 G ALDYL RPL LINCOLN DIMP 318	31-Oct-12 12:0...		Clark, A	
31029562	BR G 50A WALKER, SANTA ROSA	02-Jan-12 12:0...		Edgar, J	
31068578	R2Z SF G GPRP RPL SF CASITAS	31-Oct-12 12:0...		Betts, A	
LONDPLAC	Lonesdale Place	01-Jul-20 12:...			
VEN	Ventura County				
KERN	Kern County				
SD	San Diego County				
NA	No Access EPS Node				

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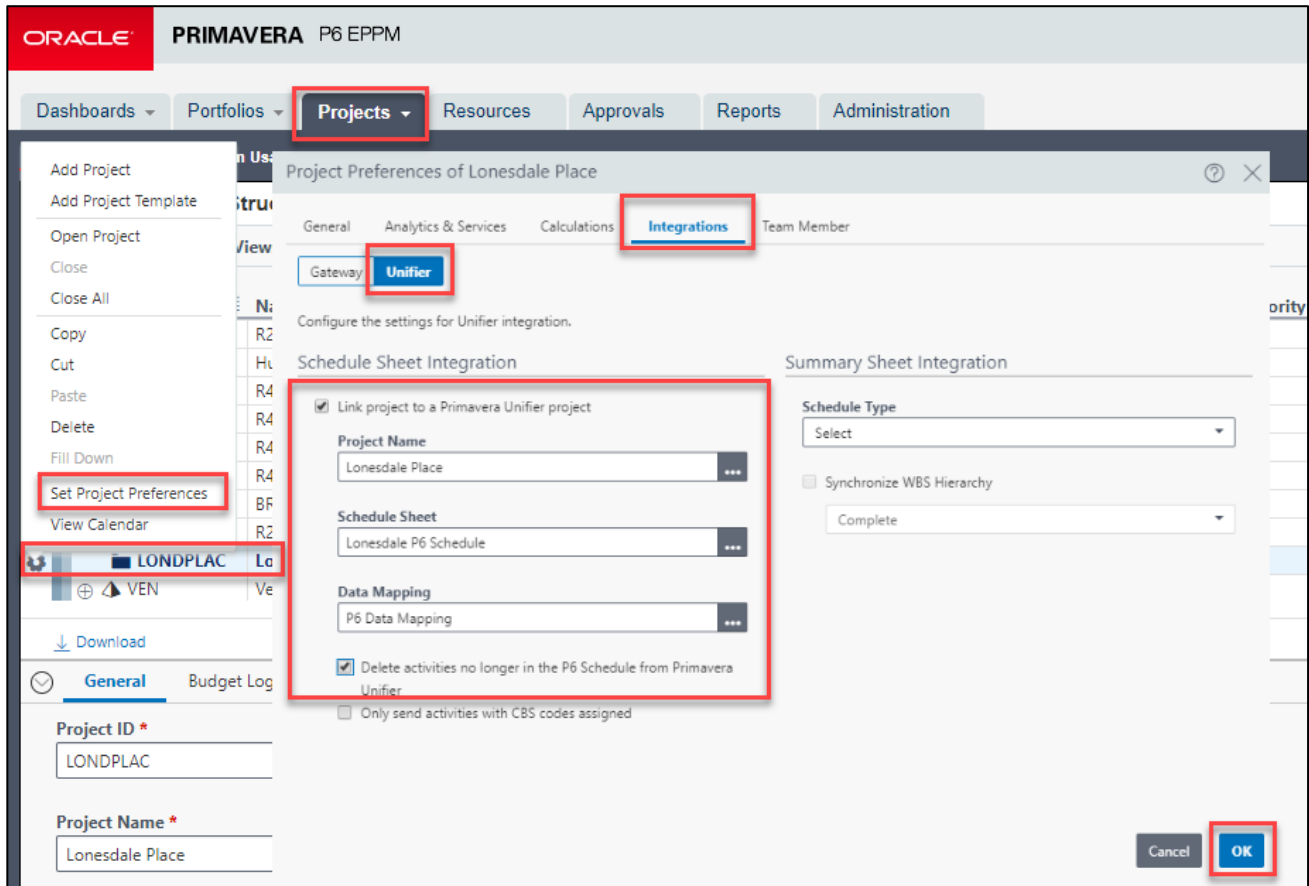
Project ID \* LONDPLAC Project Status \* Active Anticipated Start Actual Start

Project Name \* Lonesdale Place Location DRM Offices Anticipated Finish Actual Finish

# COPYING UNIFIER AND P6 PROJECTS AND TROUBLESHOOTING ERRORS

Navigate to P6 EPPM login & go to the Projects Tab

Within the User interface, navigate to EPS > Click on your copied Project > Select on the Gear Icon select > Set Project Preferences > 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



# COPYING UNIFIER AND P6 PROJECTS AND TROUBLESHOOTING ERRORS

## Sending the P6 Schedule Data to Unifier

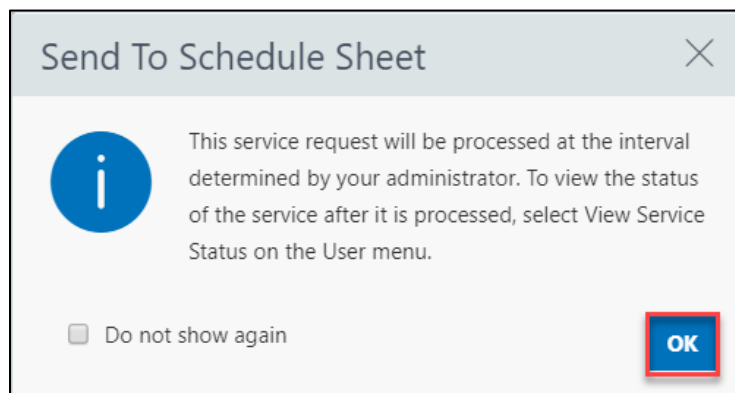
As a refresher, below are the steps to SEND P6 data over to the Unifier Schedule sheet.

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

The screenshot shows the Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', 'Approvals', 'Reports', and 'Administration'. The 'Projects' tab is selected. Below it, the 'Activities' sub-tab is active. The main area displays 'Activities of Lonesdale Place'. A context menu is open over the 'Activities' list, showing options like 'Define Baselines', 'Apply Actuals', 'Check Schedule', 'Dissolve', 'Exchange Data', 'Import', 'Leveler', 'Link Selected Activities', 'Open Dependent Projects', and 'Publish Projects'. The 'Exchange Data' option is highlighted, and a sub-menu is visible with the 'Send to Schedule Sheet' option. The bottom of the screen shows a summary table for the project 'Lonesdale Place'.

WBS Code *	WBS Name *	Anticipated Start	Anticipated Finish	Responsible Manager	Project Status
LONDPLAC	Lonesdale Place			ProjectStatus	Active

Click > OK



# COPYING UNIFIER AND P6 PROJECTS AND TROUBLESHOOTING ERRORS

Under your username > Select View Service Status > to see the completed service > Click Close

The screenshot shows the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', 'Approvals', 'Reports', and 'Administration'. The 'Activities of Lonesdale Place' table is displayed, showing a list of services and their status. A red box highlights the 'Send To Schedule Sheet' service, which is marked as 'Completed'. A red arrow points to the 'View Service Status...' option in the user menu, which is also highlighted with a red box.

ID/Code *	Service	Status	Submitted	Completed	Initiator	Projects
LOND.	Send To Schedule Sheet	Completed	17-Mar-20 02:19 P...	17-Mar-20 02:19 P...	Kevin Hicks	LONDPLAC - Lonesdale Place
A100C	Send To Schedule Sheet	Completed	17-Mar-20 02:17 PM...	17-Mar-20 02:18 PM...	Kevin Hicks	LONDPLAC - Lonesdale Place
7	Ongoing Project Administration					
1	Task 1: Project Administration					Task 1: Project Administration
2	Task 2: Requirements Verification					
3	Task 3: PMCS Delivery					
4	Task 4: User Acceptance Testing					
5	Task 5: County Implementation Team Tr...					
6	Task 6: Complete Implementation					

WBS Code *	WBS Name *	Anticipated Start	Anticipated Finish	Responsible Manager	Project Status
LONDPLAC	Lonesdale Place			ProjectStatus	Active



# COPYING UNIFIER AND P6 PROJECTS AND TROUBLESHOOTING ERRORS

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

The screenshot displays the Primavera Unifier interface. The top navigation bar shows the project hierarchy: Company Work... > Lonesdale Place > Hospital Manhat... > South District > Major Neighbor... The sidebar on the left contains various navigation options, with 'Schedule Sheets' highlighted. The main content area shows the 'Schedule Sheets' section for 'Lonesdale Place'. A table lists the schedule data, with the 'Last Update' column highlighted. The table data is as follows:

Title	Created Date	Creator	Status	Last Update
Lonesdale P6 Schedule	08/14/2018	Kevin Hicks	Active	03/17/2020

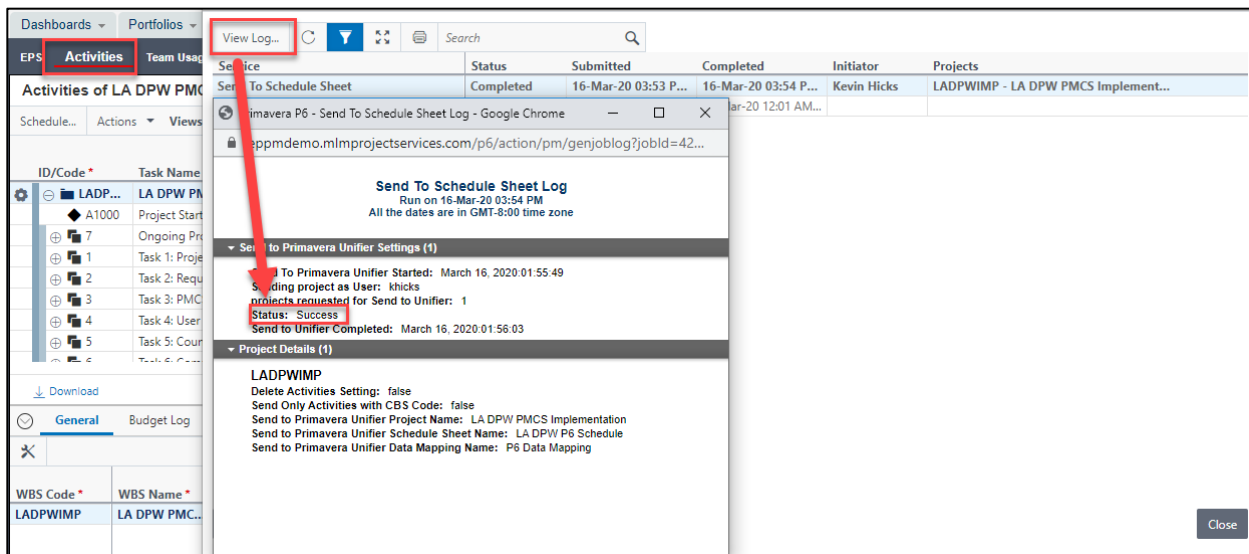
Id	Activity Name	P6 Activity ...	Start date	Finish date
2	Task 1: Project Administration		07/03/2020	08/03/2020
3	Project Initiation		07/03/2020	08/03/2020
4	Final Approval Implementation ...	A1050	08/03/2020	08/03/2020
5	Begin Project Initiation	A1005	07/03/2020	07/03/2020
6	Implementation Plan		07/06/2020	07/31/2020
7	Create Implementation Plan	A1010	07/06/2020	07/17/2020
8	Review and Approve Implem...	A1020	07/20/2020	07/24/2020
9	Modify Implementation Plan	A1025	07/27/2020	07/31/2020

# COPYING UNIFIER AND P6 PROJECTS AND TROUBLESHOOTING ERRORS

## Troubleshoot any errors that may arise

If you encounter errors when you attempt to send the P6 copied project schedule data to Unifier > they may include a most common error message > Navigate in P6 EPPM to your Project > With your "Project" Open > go to the Activities Tab > then Under Your Username > Select View Service Status > Click on View Log to see the completed Service > Click Close

If your schedule data transfer is successful you will see this message screen below



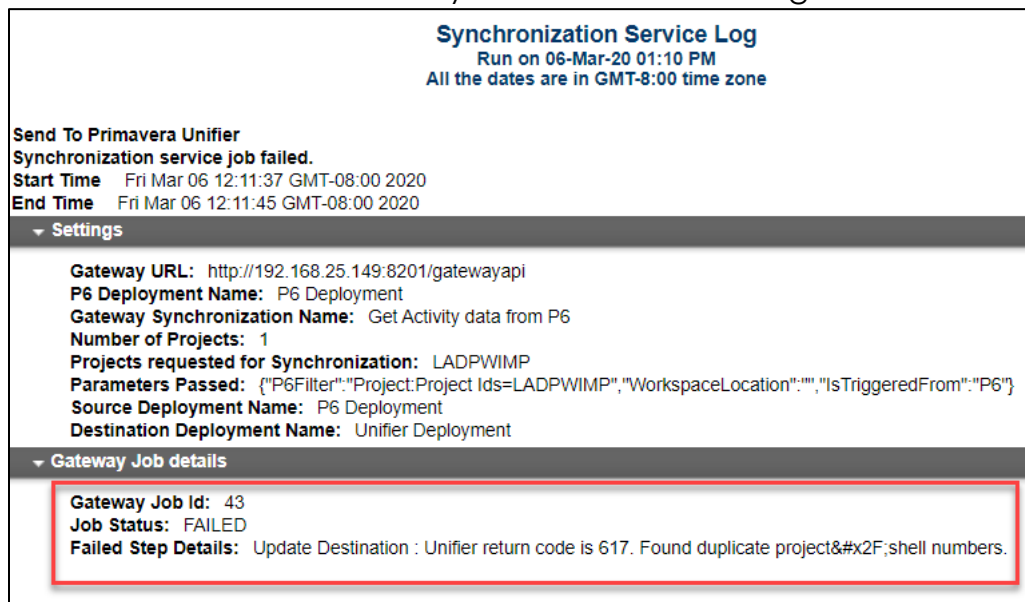
The screenshot shows the Primavera P6 EPPM interface. On the left, the 'Activities' tab is selected, and a list of activities is visible. On the right, a modal window titled 'Send To Schedule Sheet Log' is displayed. The window shows the following details:

- Service:** Send To Schedule Sheet
- Status:** Completed
- Submitted:** 16-Mar-20 03:53 P...
- Completed:** 16-Mar-20 03:54 P...
- Initiator:** Kevin Hicks
- Projects:** LADPWIMP - LA DPW PMCS Implement...

The main content of the modal window is titled 'Send To Schedule Sheet Log' and includes the following information:

- Run on 16-Mar-20 03:54 PM
- All the dates are in GMT-8:00 time zone
- Send To Primavera Unifier Settings (1)**
- Send To Primavera Unifier Started: March 16, 2020 01:55:49
- Sending project as User: khicks
- Projects requested for Send to Unifier: 1
- Status: Success** (highlighted with a red box)
- Send to Unifier Completed: March 16, 2020 01:56:03
- Project Details (1)**
- LADPWIMP
- Delete Activities Setting: false
- Send Only Activities with CBS Code: false
- Send to Primavera Unifier Project Name: LA DPW PMCS Implementation
- Send to Primavera Unifier Schedule Sheet Name: LA DPW P6 Schedule
- Send to Primavera Unifier Data Mapping Name: P6 Data Mapping

If your schedule data transfer is Failure you will see this message screen below



The screenshot shows a 'Synchronization Service Log' window. The log details the following information:

- Synchronization Service Log**
- Run on 06-Mar-20 01:10 PM
- All the dates are in GMT-8:00 time zone
- Send To Primavera Unifier**
- Synchronization service job failed.
- Start Time:** Fri Mar 06 12:11:37 GMT-08:00 2020
- End Time:** Fri Mar 06 12:11:45 GMT-08:00 2020
- Settings**
- Gateway URL: http://192.168.25.149:8201/gatewayapi
- P6 Deployment Name: P6 Deployment
- Gateway Synchronization Name: Get Activity data from P6
- Number of Projects: 1
- Projects requested for Synchronization: LADPWIMP
- Parameters Passed: {"P6Filter": "Project:Project Ids=LADPWIMP", "WorkspaceLocation": "", "IsTriggeredFrom": "P6"}
- Source Deployment Name: P6 Deployment
- Destination Deployment Name: Unifier Deployment
- Gateway Job details**
- Gateway Job Id: 43
- Job Status: FAILED
- Failed Step Details: Update Destination : Unifier return code is 617. Found duplicate project&#x2F;shell numbers.

# COPYING UNIFIER AND P6 PROJECTS AND TROUBLESHOOTING ERRORS

This error message means most likely you have duplicate Project ID Numbers on more than one Project in Unifier and or in P6 > Check both > it's highly possible it's the project that you made as Copy of earlier in Unifier

Navigate to your newly copied Unifier Project > Details Tab > and change/Double Check the Unique P6 Project ID > Click Save

The screenshot shows a 'Details' window with a 'General' tab selected. The form contains the following fields:

- Project Name \***: Lonesdale Place
- Project Number**: P-0054
- P6 Project ID**: LONDPLAC (highlighted with a red box)
- Project Type**: Sub-Project
- Project Start Date \***: 10/01/2013
- Estimated Budget**: 0.00
- Status \***: Active
- Administrator \***: Company Administrator
- Hierarchy Path \***: /CIP Projects (Enterprise)/Public Works (PW)/Stor...
- Schedule Type**: Cost Loaded
- Project End Date**: 11/28/2018

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

# COPYING UNIFIER AND P6 PROJECTS AND TROUBLESHOOTING ERRORS

Navigate back to P6 EPPM, navigate again to your new copied P6 Project > Projects Tab > EPS > General > and change/double check New Unique Project ID from Unifier that is in the field. \*\* The case sensitive words must match exactly \*\* > Click Save > and Re-Run your schedule integration

The screenshot displays the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', 'Approvals', 'Reports', and 'Administration'. The 'Projects' tab is selected, and the 'EPS' sub-tab is active. The 'Enterprise Project Structure' table is shown with columns for ID, Name, Start, Finish, Project Manager, Estimated Project Size, and Priority. A project named 'Lonesdale Place' is highlighted. Below the table, the 'General' tab is selected, showing fields for Project ID (LONDPLAC), Project Status (Active), Anticipated Start, Actual Start, Project Name (Lonesdale Place), Location (DRM Offices), Anticipated Finish, and Actual Finish.

ID *	Name *	Start	Finish	Project Manager	Estimated Project Size	Priority
3102...	R4 G ALDYL RPL LINCOLN DIM...	31-Oct-12 12:0...		Clark, A		
3102...	BR G 50A WALKER, SANTA ROSA	02-Jan-12 12:0...		Edgar, J		
3106...	R2Z SF G GPRP RPL SF CASITAS	31-Oct-12 12:0...		Betts, A		
LO...	Lonesdale Place	01-Jul-20 12:...				
VEN	Ventura County					
KERN	Kern County					
SD	San Diego County					
NA	No Access EPS Node					
LACMTA	ITS DEMO					

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Project ID \* LONDPLAC Project Status \* Active Anticipated Start Actual Start

Project Name \* Lonesdale Place Location DRM Offices Anticipated Finish Actual Finish

## 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 quickly duplicated & transferred to Unifier as long as you understand some of the aspects of its use and how it impacts your projects.