



P6 8.3 to Unifier 9.13 Integration

Don McNatty, PSP
Lim Tan, Certified Unifier Specialist

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ORACLE® **Platinum
Partner**



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- Primavera P6 Implementation Specialists
- Primavera Contract Management Implementation Specialists
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- Contract Management Certified Trainers

***2013 Technical
Webinar Series***

Thank you for joining today's technical webinar

- Mute – all call in phones are automatically muted in order to preserve the quality of the audio for all attendees.
- Questions – during the session, questions can be submitted through the Questions Box on the right side of the screen . We will try to address your questions at the end of the presentation, time permitting.
- Follow up – all registrants will receive an Excel file listing all questions and responses along with a link to the recorded webinar.

Safe Harbor

- The statements made in this technical presentation are based on our current knowledge of the tools.
- Our statements should not be construed to be an official “Oracle perspective”, but are intended to be the sharing of technical and user knowledge gained as we explore new paths and technologies, usually in advance of our clients.
- Our statements should not be construed as in conflict with any Oracle statement, as the Oracle statement is likely made based on more current knowledge than is available to us.

Twenty-five + years experience with Primavera



- Oracle Primavera Software
- Oracle Primavera Certified Training & Implementation Specializations
- Project Support Services – administrators, schedulers, estimators



- Global, dedicated environment, hosting services
 - Primavera OPPM, P6 EPPM, P6 Pro, Primavera Unifier, Contract Management, BI Publisher, UCM/Sharepoint, P6 Risk, AutoVue and Analytics
 - Hard Dollar, Acumen Fuse, Ecosys, Prism G2, US Cost, Microsoft Dynamics...
 - Global Data Centers in USA, London, Singapore and Brisbane

Agenda

- The “Unifier Webinar Series”
- Overview of Primavera P6 + Unifier
- Fundamentals of P6 8.3 – Unifier 9.13 Integration
- Unifier Setup
- P6 EPPM Setup
- Software Demonstration
- Integration Issues and Observations
- Questions

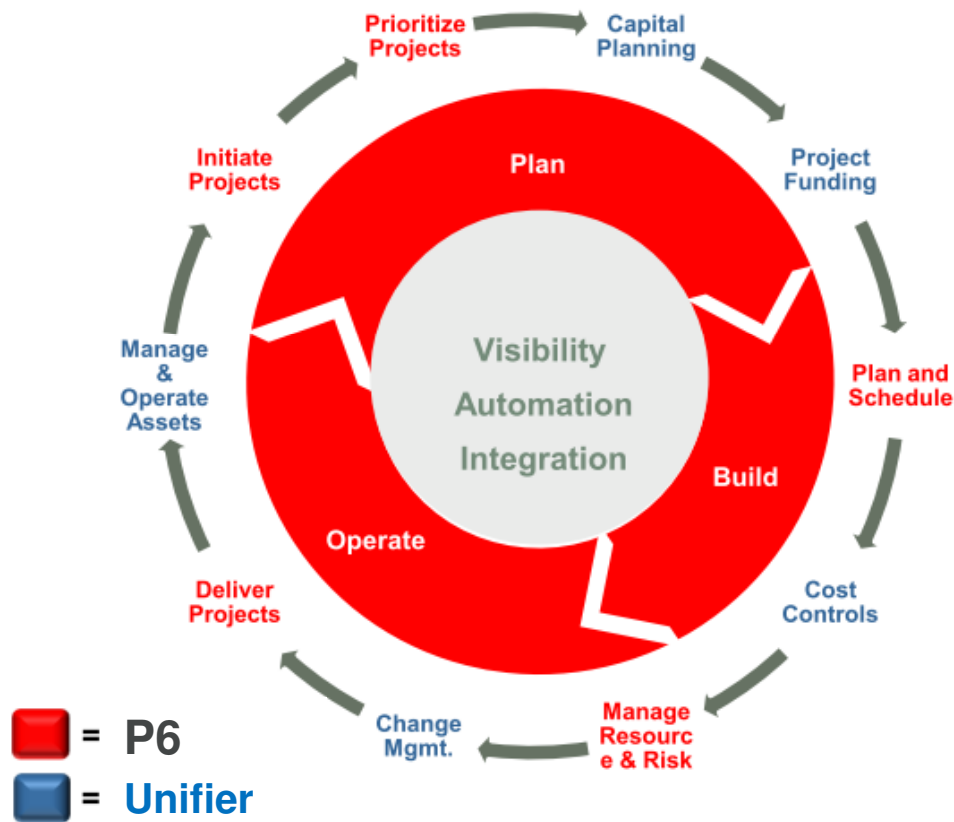
The “Unifier Webinar Series”

DRMcNatty is providing the following webinars on Unifier to help our clients better understand Unifier and how Unifier is Implemented.

- August – Overview of Oracle Primavera Unifier & Contract Management
- September – Migrating from Contract Management to Unifier
- October – Implementing Unifier in an Owner, CM or GC environment
- December – Unifier/P6 Cost and Schedule Integration
- January – Integrate Unifier with Webservice Utilities

Video of previous webinars are posted at
www.drmcnatty.com/Resources/Webinars/

Oracle Primavera P6 + Primavera Unifier



Control Across the Entire Lifecycle

- Complete governance over all project phases from planning and building to operations and maintenance

Automated Processes with Workflows

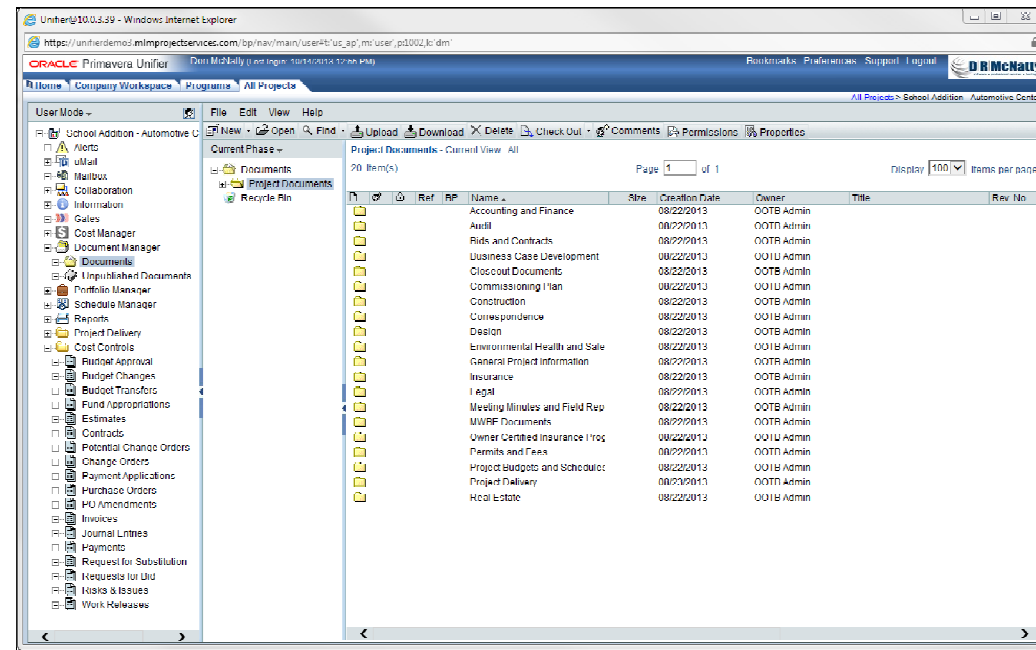
- Developed by industry veterans with focus on ease of use

Integrated with Analytics and ERP

- Easily monitor, visualize and adjust plans according to actual financial forecasts
- Web services allows you to integrate with most web based systems

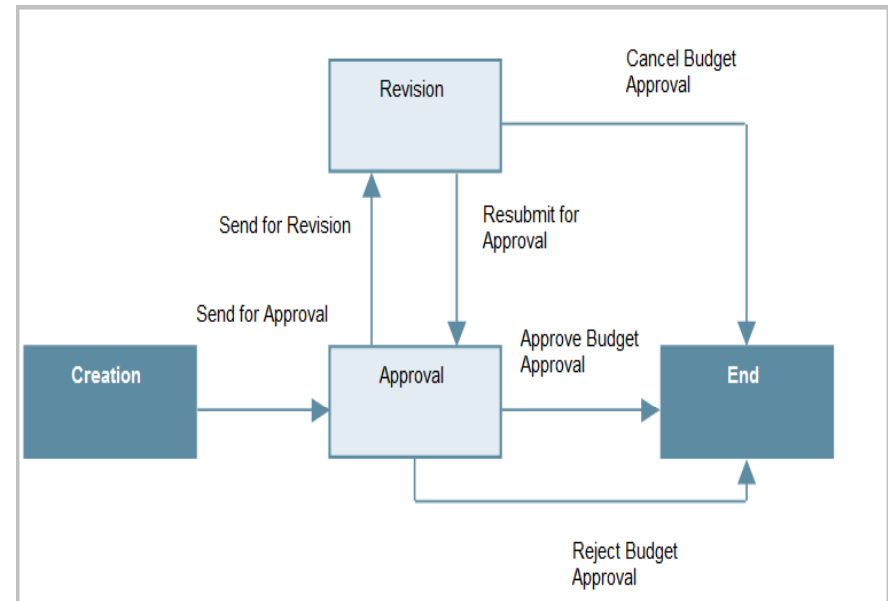
What is Primavera Unifier?

- Cloud-based Integrated Project Information Management solution



What is Primavera Unifier?

- Cloud-based Integrated Project Information Management solution
- Configurable Business Processes:
 - Automation to drive business rules, accountability and visibility



What is Primavera Unifier?

- Cloud-based Integrated Project Information Management solution
- Configurable Business Processes:
 - Automation to drive business rules, accountability and visibility
- Intuitive User Interface:
 - Increases user productivity and adoption
- Benefits
 - Real-time visibility to project data
 - Automation of Business Processes
 - Specific access levels to information
 - Complete audit trail of project events

The screenshot displays the Primavera Unifier software interface, specifically the 'Corrective WOs' form. The form is organized into several sections:

- Work Order Record Details:** This section contains fields for Record Number (CWO-0000009), Creator (Fred Kisner), Title (Air Conditioning Not Working), Lead Technician (Fred Kisner), Work Order Type (Repair), Status (Assigned), Creation Date (08/26/2012 05:45 PM Local (GMT-8)), PM Completion Due Date, Reference PM Work Order, and Labor Costs (180.00).
- Action Details:** This section includes a 'Send for Clarification' button and a 'Task Due' date of 08/31/2012.
- Labor Cost Details:** This section shows a table with 1 item(s) and a total amount of \$180.00.
- Materials Used:** This section is currently empty.

The interface also features a menu bar at the top with options like File, Edit, View, Actions, and Help. A toolbar below the menu bar includes buttons for Send, Save, Spelling, Add Attachment, Discussion, and Close Window. The bottom of the interface shows a status bar with links for Attachments (0), Linked Records (0), General Comments, and Linked Mail (0).

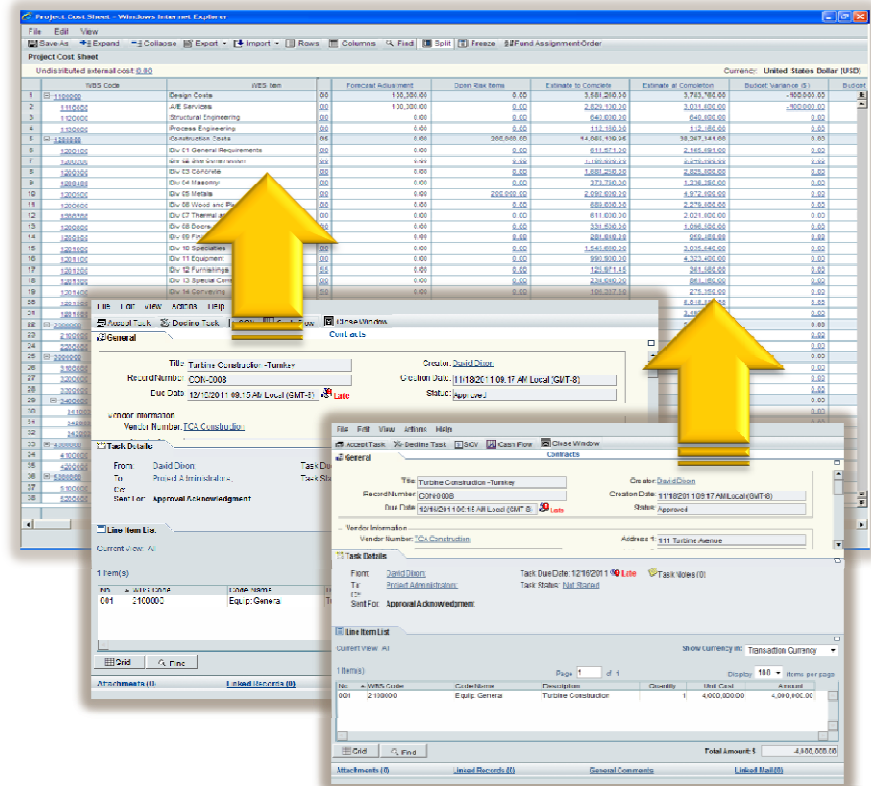
Available Pre-Configured Packages

R9.13 – Posted on eDelivery on 2 Aug 2013

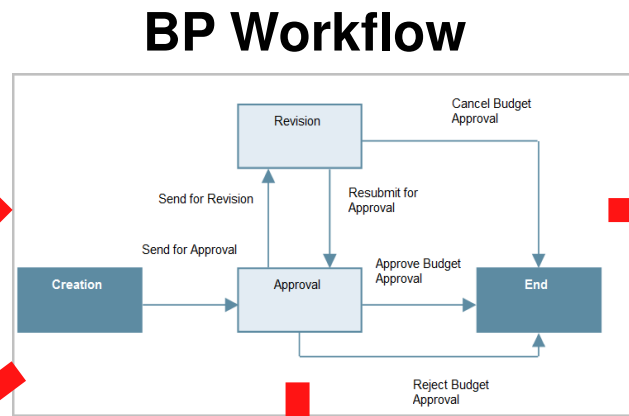
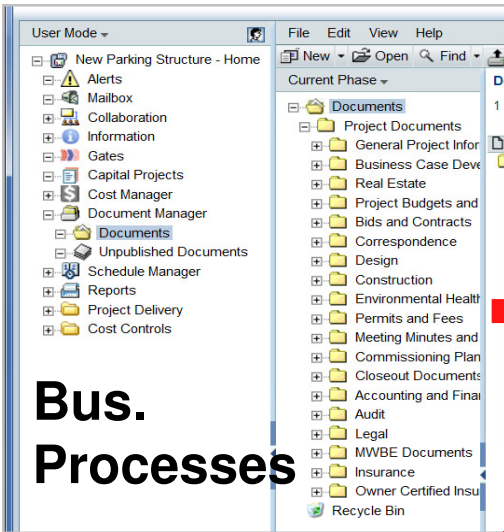
- Capital Project & Program Management (CPPM) packages
 - Primavera Unifier Capital Planning
 - Primavera Unifier Cost Controls
 - Primavera Unifier Project Delivery Management

Cost Controls

- **Real-time Cost Worksheets** - Budgets, Forecast, Commits, Changes, Spends
- **Comprehensive Workflow** based Contracts, Change Management, SOV, Invoices and Payment Applications
- **Configurable Cost Management** - support unique processes, cost codes
- **Integrated** with Cost Business Processes to route, revise and approve



Interactive Example



Cost Sheet

Cost Code	Code name	Estimates	Original Budget	Pending Budget
30	Division 3 — Concrete	5,000,000.00	4,000,000.00	
31	Basic Materials & Methods	5,000,000.00	4,000,000.00	
32	Concrete Forms & Accessories	0.00	0.00	
33	Concrete Reinforcement	0.00	0.00	
34	Cast-in-Place Concrete	0.00	0.00	
35	Precast Concrete	0.00	0.00	
36	Cementitious Decks & Underlayment	0.00	0.00	
37	Grouts	0.00	0.00	
38	Mass Concrete	0.00	0.00	
39	Concrete Restoration & Cleaning	0.00	0.00	
40	Division 4 — Masonry	0.00	0.00	
49	Division 5 — Metals	0.00	0.00	
51	Division 6 — Wood & Plastics	0.00	0.00	
55	Thermal & Moisture Protection	0.00	0.00	
80	Division 8 — Doors & Windows	0.00	0.00	
91	Division 9 — Finishes	0.00	0.00	
102	Division 10 — Specialties	0.00	0.00	
127	Division 11 — Equipment	0.00	0.00	
154	Division 12 — Furnishings	0.00	0.00	
174	Division 13 — Special Construction	0.00	0.00	
204	Division 14 — Conveying Systems	0.00	0.00	
214	Division 15 — Mechanical	0.00	0.00	
226	Division 16 — Electrical	0.00	0.00	
236	Contingencies	0.00	1,000,000.00	

Document

Carlson

REQUEST FOR INFORMATION
No. 00001

PROJECT Title Data Complex
TO: Attn: Beth Deason
Carlson Associates Inc.
839 Concord Street
Tulsa, MA 1701
Phone: 508-370-0100 Fax: 508-626-2390

DATE: 4/7/00
JOB: 10820000

Requested By: AM PENCE
Source: REQUESTED: 4/24/00

TITLE: Additional Pricing

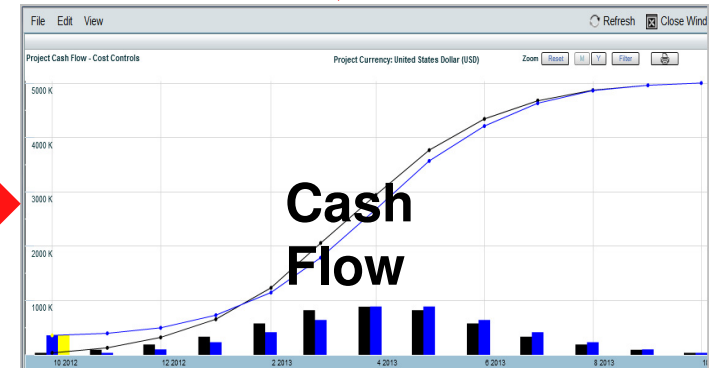
REQUIREMENT: Will additional pricing be required around the project off-site parking?

Requested By: Carlson Associates Inc. Associate
Stated: Bob Noyes

ANSWER: Yes, follow the specifications.

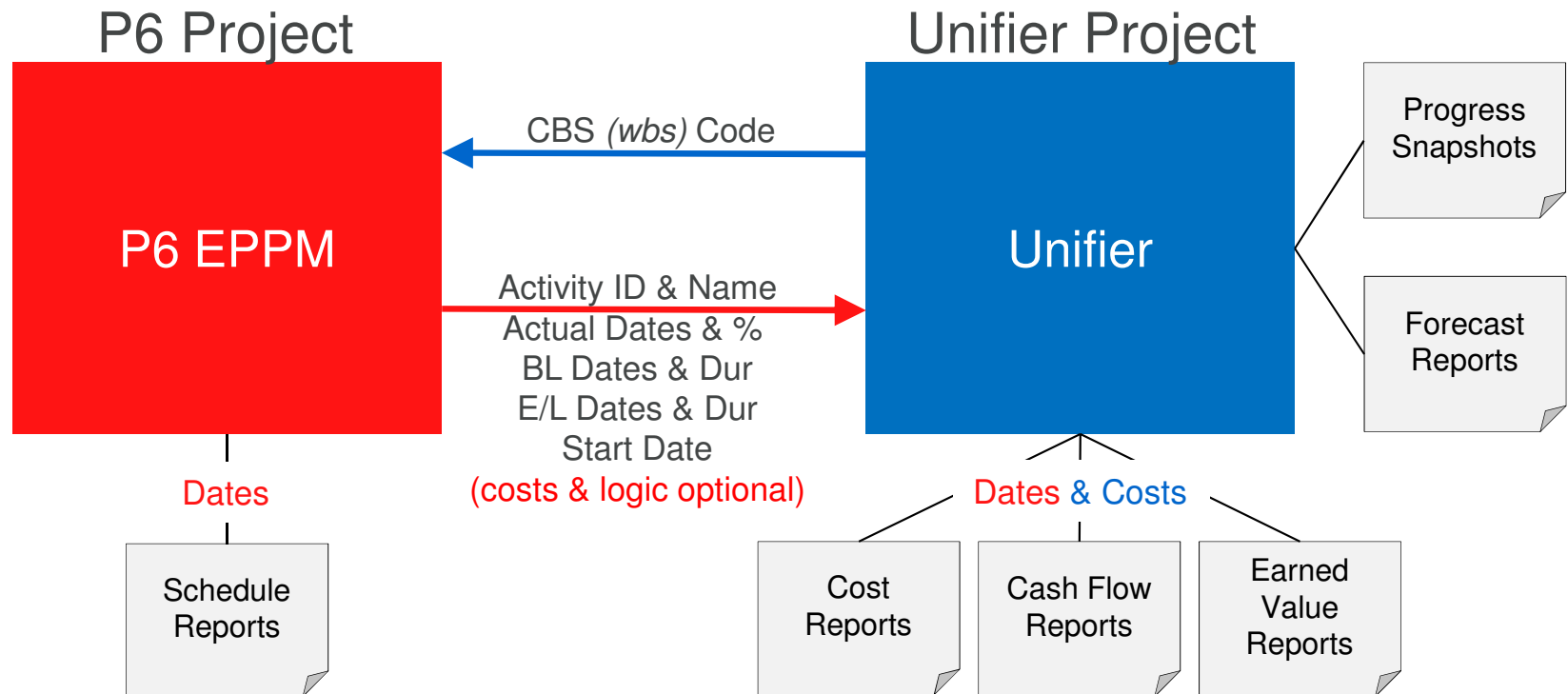
Schedule

Project Schedule Sheet					Mar 17, 2013							Mar 24, 2013							Mar 31, 2013																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																								
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Fundamentals of P6-Unifier Integration

Based on “Base Product” P6 EPPM 8.3 and Unifier 9.13 (8/2013)



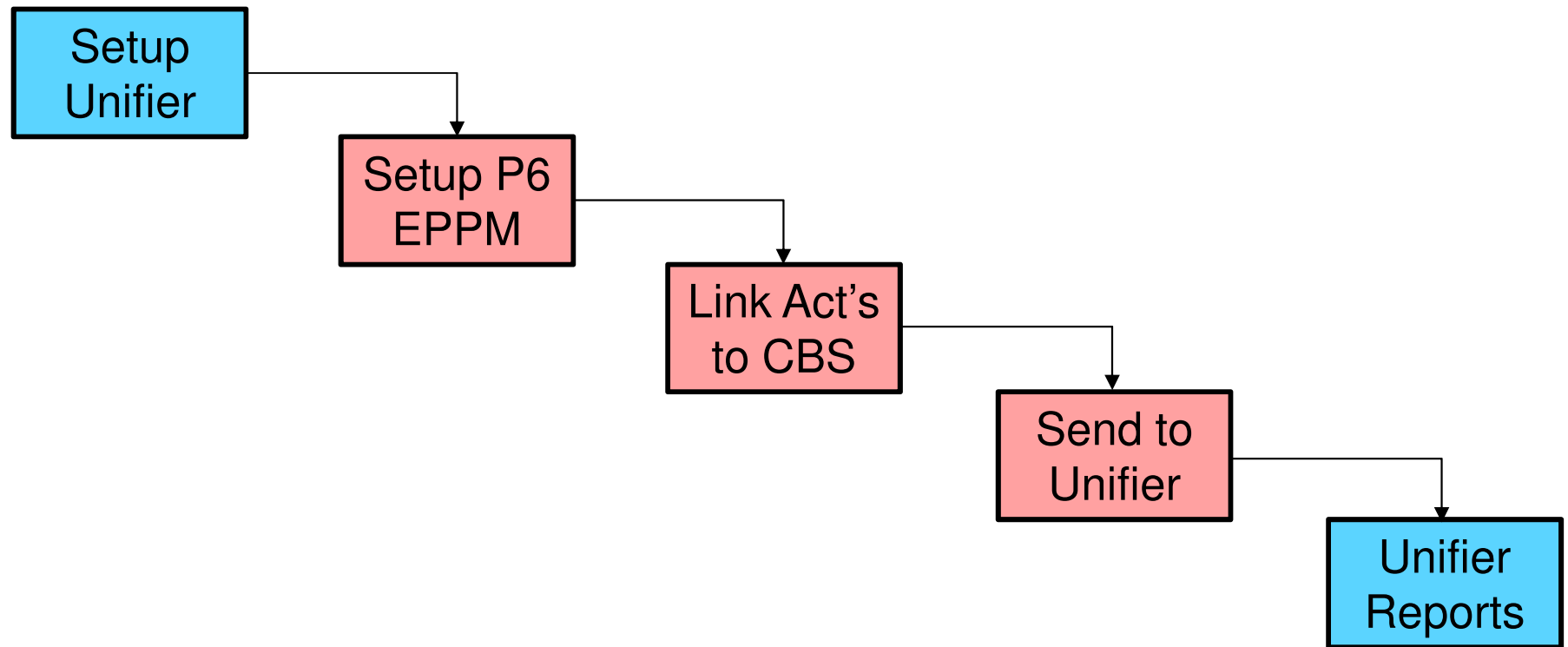
Why Link P6 and Unifier?

Cost Control application provides a way to manage budget, scope, and schedule:

- Establish & control all project costs in Unifier.
- Manage funding, estimates, budgets, commitments and changes.
- Pay commitments and track spending.
- Link to a project schedule and monitor project progress.
- Report on all aspects of the project.
- Retain and manage all project documents.
- Maintain an audit trail by using best practice business processes to manage costs.

Integration Process

Based on “Base Product” P6 EPPM 8.3 and Unifier 9.13 (8/2013)



Unifier Setup

Based on “Base Product” P6 EPPM 8.3 and Unifier 9.13 (8/2013)

- Create and populate Cost Sheet
- Create Schedule Sheet
- Create Cash Flow(s)
- Default Budget and Progress Method
- Data Mapping – Activities
- Data Mapping – Resources
- Data Mapping Options

Unifier Schedule Manager

Default Budget and Progress Method Setup

Default Budget and Progress Method Setup

Activity Budget Distribution Profile

- ☒ Linear
- ☐ S-Curve
Sigma: Mu: %
- ☐ On Start and Finish
% budgeted on Start: % and Finish: %
- ☐ Import distribution data from external source
- ☐ Distribution profile based on resource

Default % Complete and Earned Progress

Entry Method:

Default % Complete Calculation Method

- ☐ Manual activity % complete and resource % complete
- ☒ Manual activity % complete - updates resource % complete
- ☐ Resource updates Activity - weighted avg. of resource costs
- ☐ Resource updates Activity - weighted avg. of resource hours

Default % Earned Calculation Method

- ☐ Manual activity % earned and resource % earned
- ☐ Manual activity % earned - updates resource % earned
- ☐ Resource updates Activity - weighted avg. of resource costs
- ☐ Update Activity and all resources on activity start and finish
% Earned on Actual Start: % and Actual Finish: % of budget

Additional Options

Work Package:

Reporting Period:

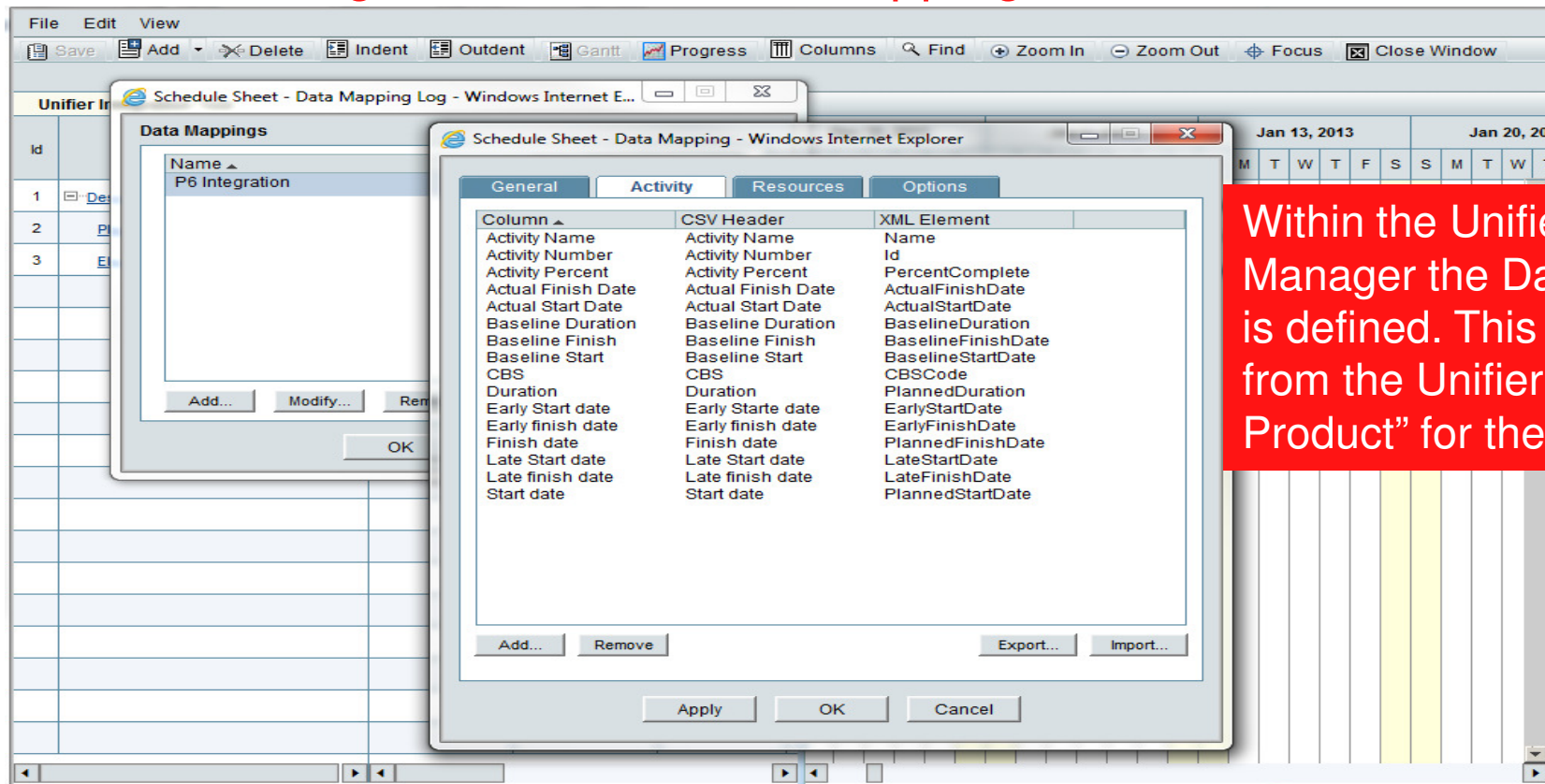
☐ Do not allow progress entry older than current period

☐ Allow editing of last progress, working days into current period

The Budget and Progress defaults are defined as such in the Unifier “Base Product” solution.

Unifier – Data Mapping - Activities

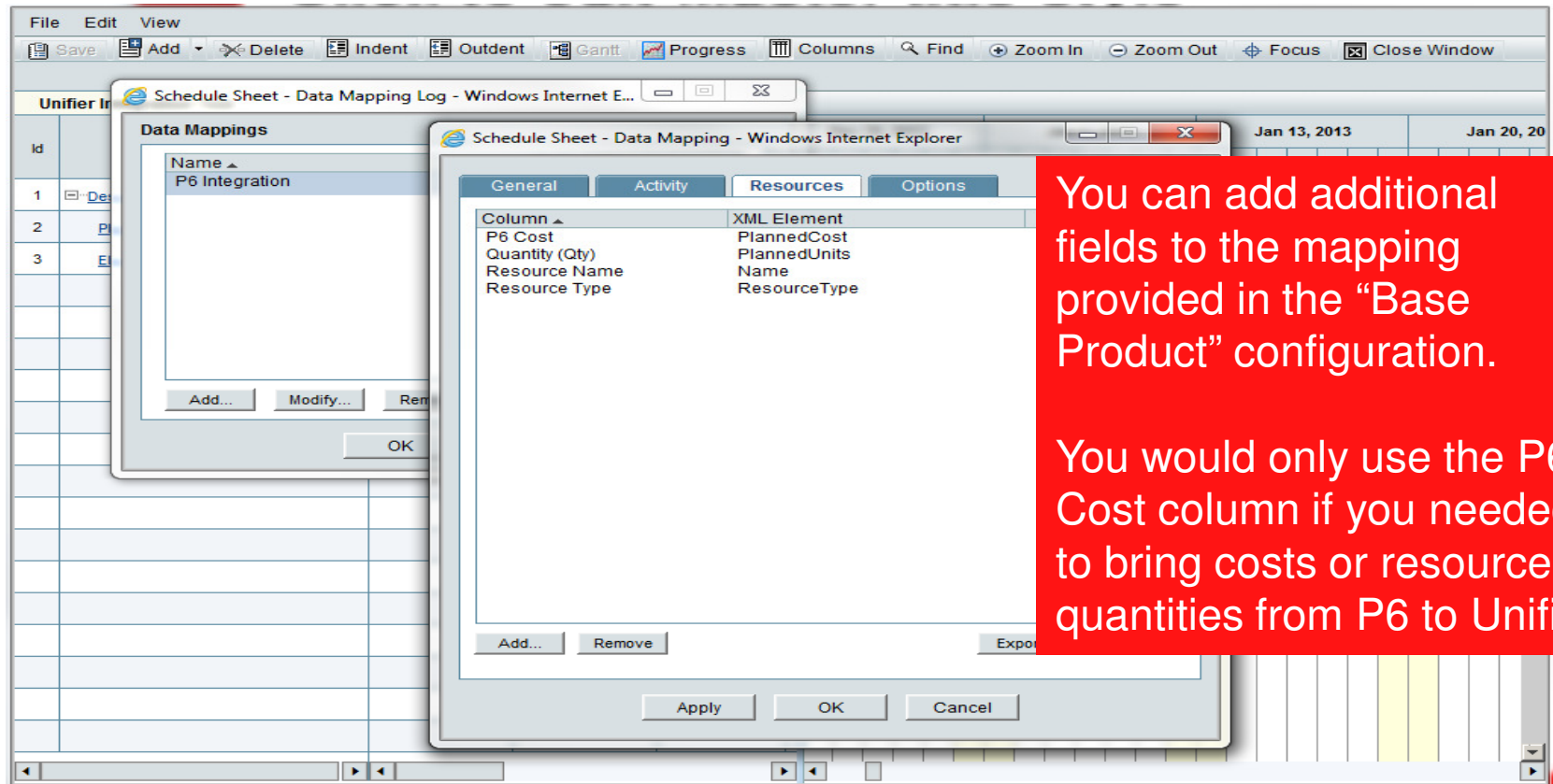
You can change the default data mapping



Within the Unifier Schedule Manager the Data Mapping is defined. This Mapping is from the Unifier “Base Product” for the Activities.

Unifier – Data Mapping - Resources

P6 Resources not managed by “Unifier Resource Manager”



P6 EPPM Setup

Based on “Base Product” P6 EPPM 8.3 and Unifier 9.13 (8/2013)

- P6 Application Settings
- Create Project Schedule
- Project Preferences
- Link Unifier CBS (*wbs*) Code to Activities
- Send to Unifier from EPS or Activity Screen

P6 Application Settings

Must be set in P6 EPPM Administration

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Welcome, admin Administer Print Help Logout

Dashboards Portfolios Projects Resources

Application Settings

- Data Limits
- Earned Value
- General**
- ID Lengths
- Reports
- Services
- Timesheets
- Time Periods

General

Starting Day of Week
First day of week for calendars
Sunday

Activity Duration
Default duration for new activities
5.0d

Document Management
Enter the P6 URL to enable users to view content repository documents in the P6 Prof

Contract Management
Enter the Contract Management URL to enable access to Contract Management from F

Primavera Unifier
Enter the Primavera Unifier URL and credentials to enable Primavera Unifier link to P6

Primavera Unifier URL

Company Short Name

Authentication Code

Online Help
Enter the Online Help URL for the P6 Professional module.
http://docs.oracle.com/cd/E35157_01/client_help/

☐ Always launch Online Help for the F1 shortcut key and context-sensitive help

Save Save and Close Cancel

Provide the URL to the Unifier instance, the Company Short Name and Authentication Code. These are required for the web services.

Project Preferences

Only available in P6 EPPM

The screenshot shows the Oracle Primavera P6 interface. The 'Project Preferences' dialog box is open for 'Ray's Test Project'. The 'Primavera Unifier' tab is selected, and the 'Link project to a Primavera Unifier project' checkbox is checked. The 'Project Name' field is set to 'Ray's Test'. The 'Schedule Sheet' field is set to 'Project Schedule Sheet'. The 'Data Mapping' field is set to 'P6 Integration'. The 'Delete activities no longer in the P6 Schedule from Primavera Unifier' checkbox is checked. The 'Only send activities with CBS codes assigned' checkbox is unchecked. A red box highlights the 'Primavera Unifier' tab and the 'Link project to a Primavera Unifier project' checkbox. A red arrow points from the text box to the 'Project Name' field.

Project Preferences of Ray's Test Project

Primavera Unifier

- ☒ Link project to a Primavera Unifier project
- Project Name: Ray's Test
- Schedule Sheet: Project Schedule Sheet
- Data Mapping: P6 Integration
- ☒ Delete activities no longer in the P6 Schedule from Primavera Unifier
- ☐ Only send activities with CBS codes assigned

Project Owner	Current Phase	Project Score
		62
		0
		0
		0
		0
		0
		67
		0
Jeff Young	Development	78
Jeff Young	Development	72
Vendy Resner	Design	80
Vendy Resner	Design	84
Paul Kim	Initiation	77
Paul Kim	Initiation	75
		71
		80

You can now select the related Unifier Project, Schedule Sheet and Data Mapping to be used for the integration. The Data Mapping is defined in Unifier.

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Project Activities

Unifier integration links P6 activities to a Unifier Cost element.

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Dashboards Portfolios Projects Resources

Activities EPS Workspace Team Usage Issues Risks Documents

Activities of Ray's Test Project

WBS / Activity Activity ID Planned Start Planned Finish Planned Duration CBS Actual Start Actual Finish Actual Duration

WBS / Activity	Activity ID	Planned Start	Planned Finish	Planned Duration	CBS	Actual Start	Actual Finish	Actual Duration
Ray's Test Project		02-Jan-13 08:00	26-Mar-13 04:00	60.0d		02-Jan-13 08:00		21.0d
Design		02-Jan-13 08:00	26-Mar-13 04:00	60.0d		02-Jan-13 08:00		21.0d
Electrical Requirements	DES-002	02-Jan-13 08:00	26-Feb-13 04:00	25.0d	03~~03.01	02-Jan-13 08:00		21.0d
Plumbing Definition	DES-0001	16-Jan-13 08:00	26-Mar-13 04:00	50.0d	01~~01.01	16-Jan-13 08:00		11.0d

With the link to the Unifier Project you can now add the CBS Code to the columns and select the related Unifier CBS Code for the activity. (Note that the CBS code is only available on the columns)

Select CBS

Search

- 01 - General Requirements
 - 01.01 - Requirements Definition
- 03 - Concrete
 - 03.01 - Forms
 - 03.02 - Concrete Pour
- 04 - Masonry

Linking does not expose Unifier cost data in P6.

Assignments Codes Documents Expenses Feedback General Issues Notebooks Predecessors Risks Steps Successors Trace Logic

Send to Unifier from the EPS Screen

“Send to Unifier” populates Unifier based on the Data Map

ORACLE Primavera P6

Welcome, admin Administrator Print Help Logout

Dashboards Portfolios Projects Resources

Activities EPS Workspace Team Usage Issues Risks Documents

Enterprise Project Structure

Actions Edit View

Save Ctrl-S
Cancel Escape
Add
Delete Delete
Open
Release Exclusive Lock
Close All
Define Baselines...
Set Project Preferences...
View Calendar...
Summarize Projects
Publish Projects
Print Ctrl-P
Print Preview...
Page Setup

Import/Export
Energy Services
Sunset Gorge - Routine Mainten

Export to Excel
XML Project Import/Export...
Send to Primavera Unifier

Project ID	Enable Publication	Last Published On	Location	Location	Planned Start Date	Data Date	Project Owner	Current Phase	Project Score
Milestone Pr...	<input checked="" type="checkbox"/>				01-Jul-10 08:...	08-Jun-11 09:...			62
RAY-0001	<input checked="" type="checkbox"/>				31-Jan-13 12:...				0
UI-1	<input checked="" type="checkbox"/>				02-Jan-13 12:...				0
UI-2	<input checked="" type="checkbox"/>				01-Feb-13 12:...				0
UIN-1	<input checked="" type="checkbox"/>				02-Jan-13 12:...				0
nicole	<input checked="" type="checkbox"/>				18-Feb-13 12:...				0
Maria Project	<input checked="" type="checkbox"/>								0
AUser Project	<input checked="" type="checkbox"/>								67
EC00501	<input checked="" type="checkbox"/>		China	SANYA					78
EC00610	<input checked="" type="checkbox"/>		Australia	Perth					72
EC00515	<input checked="" type="checkbox"/>		Europe	Paris					80
EC00620	<input checked="" type="checkbox"/>		Latin America	Lima					84
	<input checked="" type="checkbox"/>		North America	Philad					77
	<input checked="" type="checkbox"/>			New D					75
	<input checked="" type="checkbox"/>		Brazil	SAO P					72
	<input checked="" type="checkbox"/>		North America	Baltim					71
	<input checked="" type="checkbox"/>								80

Risks

ID	Name	Owner	Category	Type	Status	Project ID	Project Name	Cost
----	------	-------	----------	------	--------	------------	--------------	------

Codes Description Funding General Issues Notebooks Risks

Send to Unifier from the Activities Screen

“Send to Unifier” also works from the Activities screen

The screenshot displays the Oracle Primavera P6 interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', and 'Resources'. The 'Activities' tab is selected, showing a table of activities for 'Ray's Test Project'. The table has columns for ID, Planned Start, Planned Finish, Planned Duration, CBS, Actual Start, Actual Finish, and Actual Duration. A Gantt chart is visible on the right side of the screen.

The 'Activities of Ray's Test Project' table shows the following data:

ID	Planned Start	Planned Finish	Planned Duration	CBS	Actual Start	Actual Finish	Actual Duration
02	02-Jan-13 08:...	26-Mar-13 04:...	60.0d		02-Jan-13 08:...		
02	02-Jan-13 08:...	26-Mar-13 04:...	60.0d		02-Jan-13 08:...		21.0d
02	02-Jan-13 08:...	26-Feb-13 04:...	40.0d	03~03.01	02-Jan-13 08:...		21.0d
001	16-Jan-13 08:...	26-Mar-13 04:...	50.0d	01~01.01	16-Jan-13 08:...		11.0d

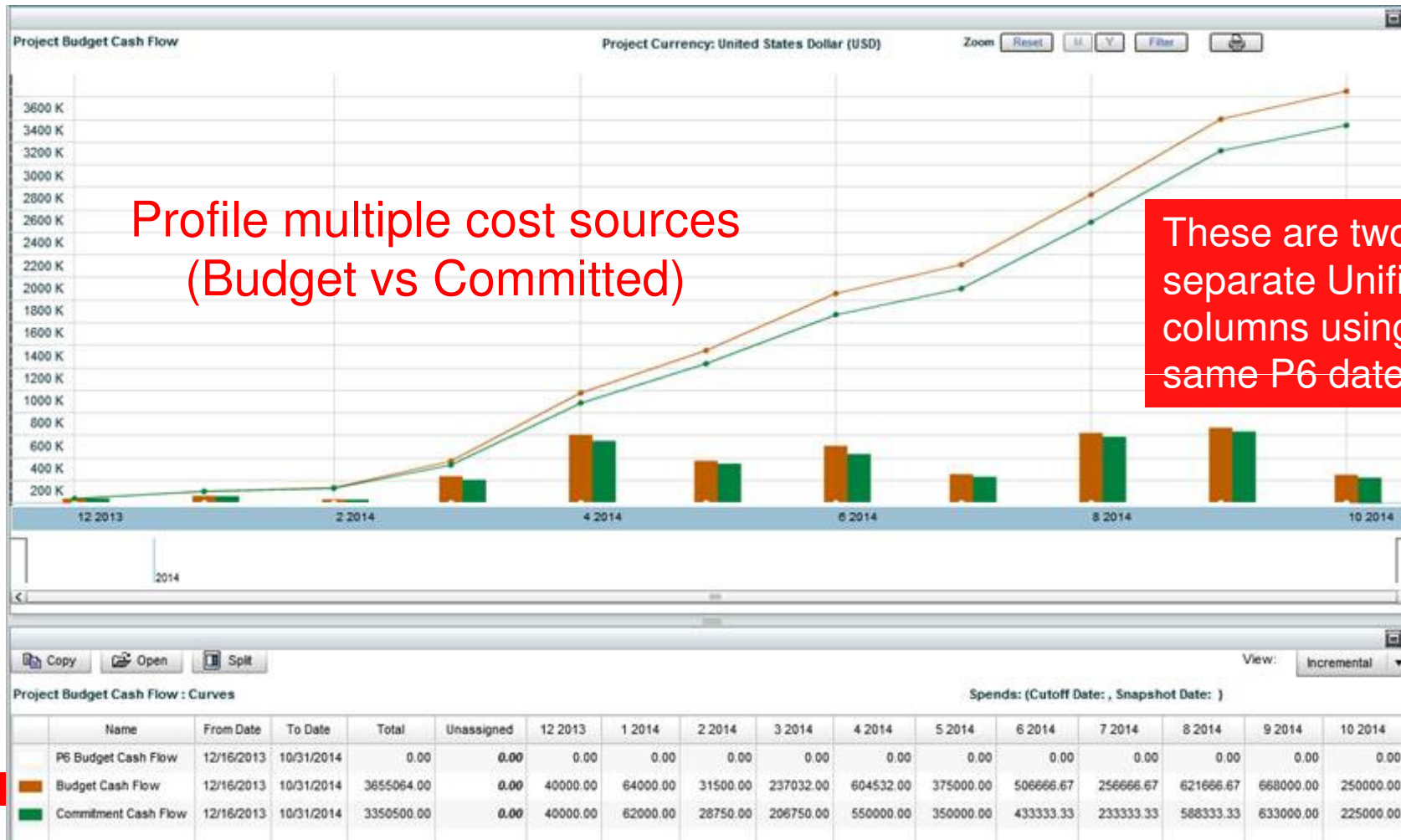
The 'Import/Export' menu is open, showing options: 'Import from Excel...', 'Export to Excel', 'Create Import Template', 'Send to Primavera Unifier', and 'Send to ERP...'. The 'Send to Primavera Unifier' option is highlighted with a red box.

Software Demonstration

Lim Tan running Unifier 9.13 and P6 EPPM/Pro 8.3 deployed in MLM Project Services hosted data center

- Unifier Setup
- P6 EPPM Setup
- Send P6 data to Unifier
- Execute a Unifier Cash Flow
 - The “Base Product” integration does not link P6 dates to Unifier costs in Unifier. Lim will demonstrate a technique to add P6 dates to any Unifier Cash Flow profile.

Unifier Cash Flow



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Other Integration Capabilities

Manually import schedules from following formats

Data Format	Data mapping requirements
CSV	Requires mapping: you can select the mapping when you upload the file.
MPP	Mapping is not required. Import limited to Start & Finish Date, Duration.
Primavera XML	Requires default data mapping.
MS Project SML	Requires mapping: you can select the mapping when you upload the file.

Integration Issues & Observations

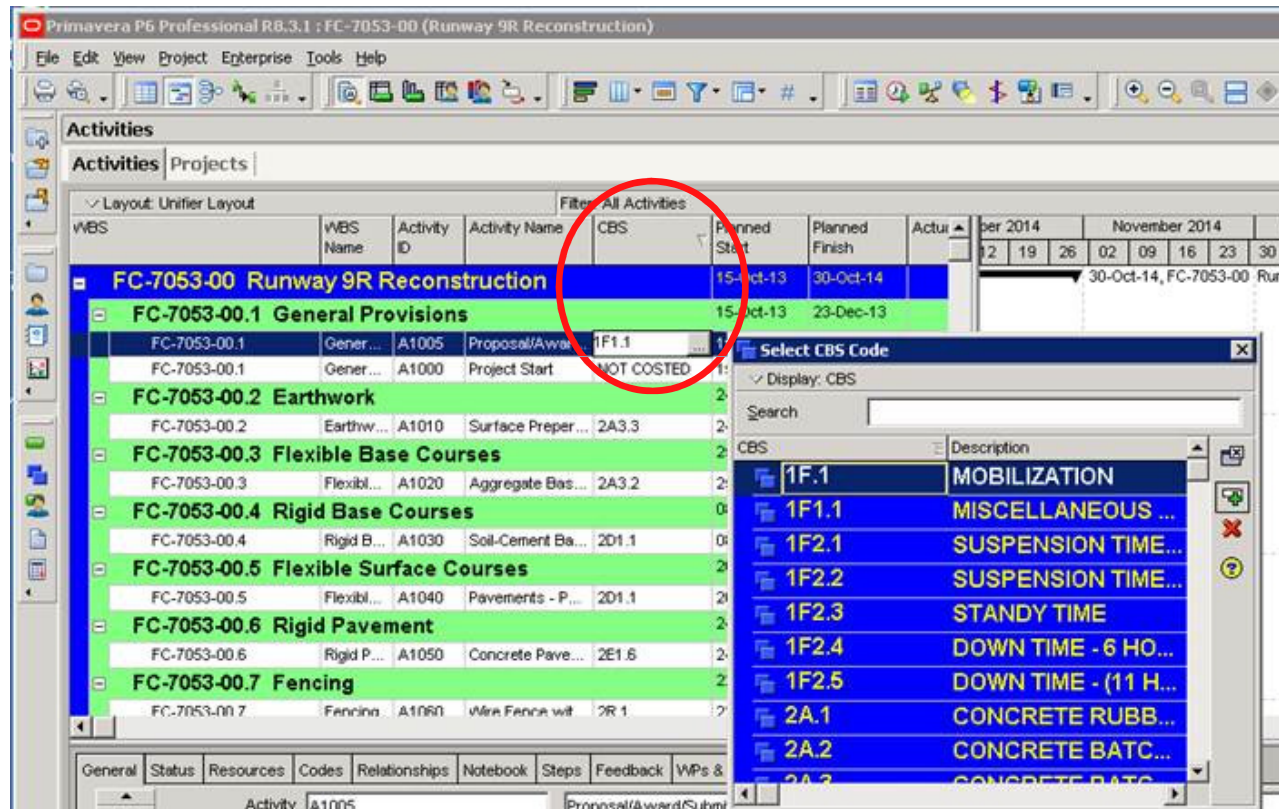
Getting the cost transfer to work the way we wanted it to required a manual step in the process

- Integration setup in P6 EPPM (web) but can “push” from P6 Pro.
- Unifier “costs” do not “import” to P6, you can only link an activity to a Unifier “CBS Code” (Cost Breakdown Structure)
- “P6 Send to Unifier” can include costs, resources and relationships.
- Used a simple export/import technique to align P6 dates with Unifier Budget & Committed Cost once the built in integration imported the P6 dates into Unifier.

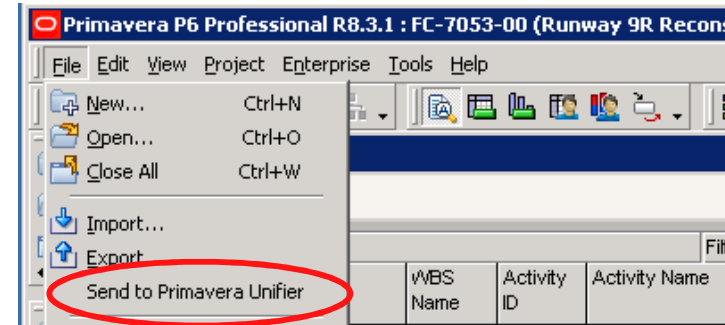
Next Month – Unifier Web-services integration.

Access CBS Column from P6 Pro

Unifier DB will connect to multiple P6 EPPM DB's



- Must be linked in P6 EPPM first
- P6 Pro must be connected to the P6 EPPM DB
- Unifier costs are not visible in P6.



- Can send from P6 Pro

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Questions

All questions are gathered into a master sheet, answered and distributed to all registrants as well as posted on our website.

- Answers are based on our own experiences using the various software products related to your questions.



Thank you for participating

- Don McNatty – dmcnatty@drmcnatty.com
- Lim Tan – ltan@drmcnatty.com

UPCOMING EVENTS



The DRM/MLM team is participating in these upcoming events.

Hope to see you there!

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events and upcoming webinars.
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Click on "News"