



PROJECT MANAGEMENT SOLUTIONS THAT *SIMPLY WORK* SINCE 1989.

## UNIFIER & P6

HOW INTEGRATION OF BOTH SYSTEMS CAN IMPROVE YOUR ORGANIZATION

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December 19, 2018

[www.drmcnatty.com](http://www.drmcnatty.com)



# Thank you for joining today's 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 “Vendor 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.
- You need to make your own judgments as to the application of our shared ideas in your own, unique environment.

# Products and Services

- Project Controls System Implementation
- Cloud Based, Global Managed Hosting Services
- Software Training Services
- Integration, Analytics, Dashboards, Risk and Role-based User Access Tools
- Program and Project System Support Services and Partnering
- Mentored and Supported SB/DVBE Project Staffing Resources

# Tool Matrix

Business Process	 ORACLE PRIMAVERA	 ARES PRISM	 Deltak   ACUMEN	 ORACLE + aconex	 ProjectStatus
Portfolio Management	P6, Unifier			Aconex	View
Planning & Budgeting	Unifier	G2		Aconex	Collaborate
Estimating		Estimating		Aconex	
CPM Scheduling	P6	Scheduling	Fuse		Status
Cost Management & Reporting	P6, Unifier	G2	Fuse	Aconex	Collaborate
Document Management	Unifier	Prism Docs		Aconex	
Change Management	Unifier	G2		Aconex	
Engineering Forms	Unifier	G2		Aconex	
BIM/Schedule Integration				Aconex	
Risk Analysis	P6 Risk		Risk		Collaborate
Risk Management & Mitigation	P6		Risk	Aconex	Collaborate
Role Based Cloud Dashboard	Dashboard	Dashboard		Aconex	View
Earned Value	P6	Earned Value		Aconex	
Claims Support & Analysis	P6		Fuse	Aconex	
Facility Management/Work Orders	Unifier			Aconex	
Mobile online/offline support	Mobile			Aconex	Browser
Integration with Finance/ERP	Gateway	Integrator		Aconex	Gateway

DRMcNatty supports these project controls tools as an authorized partner, trainer and implementer as well as providing trained and supported project staffing resources.

# Abstract

There are many reasons and benefits to integrating P6 and Unifier together. You are able to utilize the best of both systems. P6 dates can be captured within Unifier. With P6 Pro and P6 EPPM you are able to relate an activity to the CBS (WBS) code in Unifier. You can then set up to have your Unifier Cost Sheet and Cashflow be driven by a P6 schedule. In doing this you will have the ability to continually update and report on this data using it to make actionable informed decisions. With your time phased data your Organization can expect to generate progress snapshots and forecast reports that hold the complete picture. In this webinar we will be looking at this integration and discussing some of these benefits.

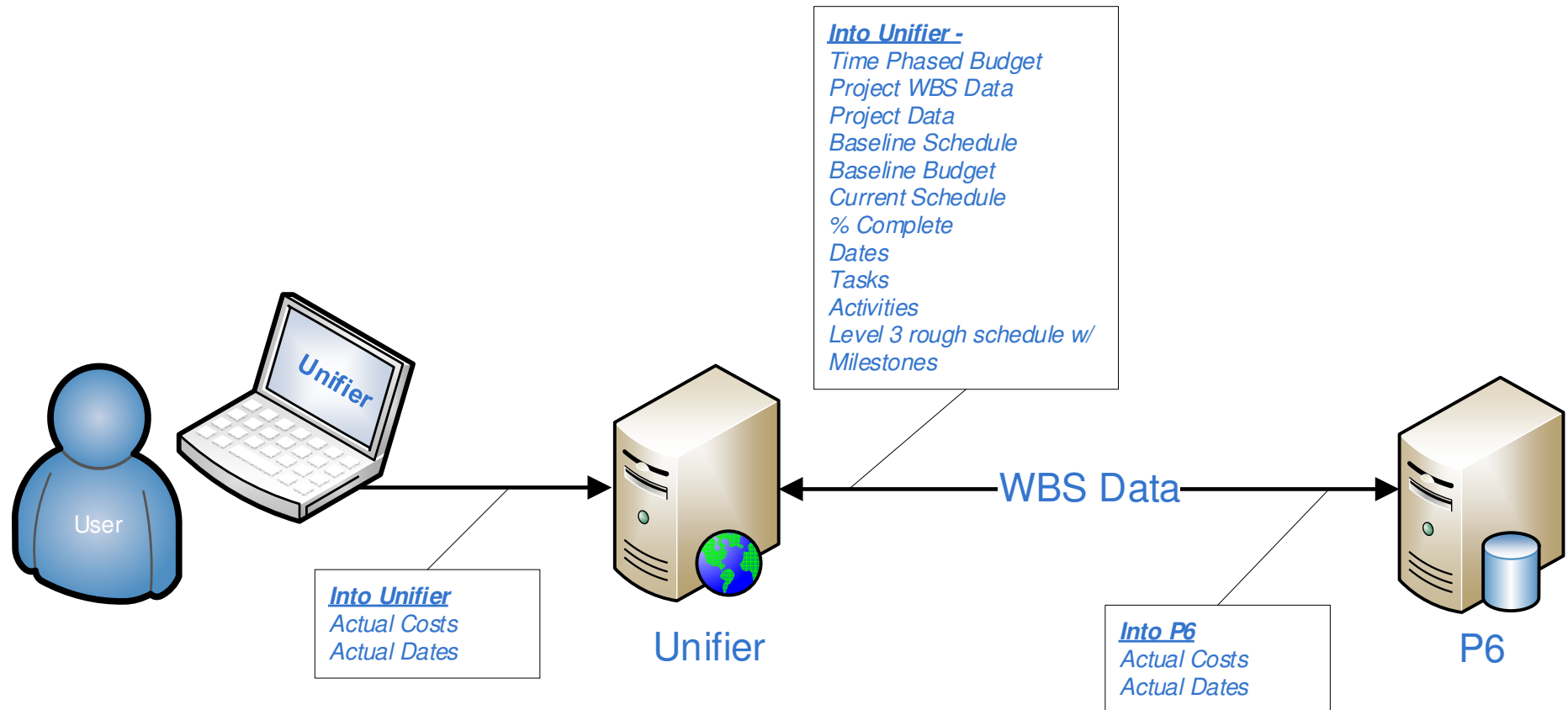
# Agenda

- Overview of Unifier
- Construction Projects, EPC, EPCM, CIP, in P6 & Primavera Unifier

## Topics:

- Unifier & P6 – Schedule Sheet
- Demo
- Activity Sheet
- Gateway Unifier & P6
- Demo
- P6 Summary Sheet
- Unifier Cost Sheet
- Cash Flow Curve
- Follow-ups
- Question and Comments

# Unifier and P6





# P6 to Unifier

ORACLE PRIMAVERA P6 EPPM

Dashboards ▾ Portfolios ▾ **Projects ▾** Resources Approvals Reports Administration

EPS **Activities** Workspace Team Usage Assignments Issues Documents Risks

### Activities of Lonesdale Place

Schedule... **Actions ▾** Views Default View

- Define Baselines
- Apply Actuals
- Check Schedule
- Dissolve
- Exchange Data ▸**
  - Import CBS Codes
  - Send to Primavera Unifier
  - Send to Schedule Sheet**
- Import
- Leveler
- Link Selected Activities
- Open Dependent Projects
- Publish Projects

ID/Code *	CBS	Start	Finish	Remaining Duration	Activity % Complete
07100	07 07900 V.1.1	30-Jun-17 05:00 PM A	30-Jun-17 05:00 PM A	0.0d	100%
07060	07 07900 V.1.1	30-Dec-16 12:00 AM A	30-Jun-17 05:00 PM A	0.0d	100%
07050		09-Nov-16 12:00 AM A	09-Nov-16 12:00 AM A	0.0d	100%
07010		31-Mar-16 08:00 AM A	31-Mar-16 08:00 AM A	0.0d	100%
07030		31-Mar-16 12:00 AM A	09-Nov-16 12:00 AM A	0.0d	100%
07040		09-Nov-16 12:00 AM A	09-Nov-16 12:00 AM A	0.0d	100%

08

Download

# Unifier Schedule Sheet From P6

ORACLE PRIMA

Save Add Delete Indent Outdent Gantt Progress Columns Find Zoom In Zoom Out Focus Close

CIP Projects

Lonesdale Place - Home

Alerts

Mailbox

Task Manager

Information

Document Manager

Financial Transactions

Change Management

Financial Reporting

Submittal Manager

RFI Manager

Schedule Manager

Schedule Sheets

Activity Sheet

P6 Summary Sheets

Communication & Fo...

Ongoing Reporting

Project Closeout

Reports

Lonesdale P6 Schedule

Id	Activity Name	P6 Activity Number	Start date	Finish date	Actual Start Date	Actual Finish Date	Activity Per...	Duration
1	<a href="#">Procurement for Construction</a>		04/20/2015	01/18/2016				274
2	<a href="#">Bid Opening (C)</a>	06030	09/29/2015	09/30/2015	09/29/2015	09/30/2015	0	2
3	<a href="#">BOCC Award (C)</a>	06070	12/16/2015	12/16/2015	12/16/2015	12/16/2015	0	1
4	<a href="#">Bid Advertisement (C)</a>	06020	08/21/2015	09/28/2015	08/21/2015	09/28/2015	0	27
5	<a href="#">Contract Preparation</a>	06010	04/20/2015	07/03/2015	04/20/2015	07/05/2015	0	55
6	<a href="#">Bid Evaluation</a>	06040	10/01/2015	10/16/2015	10/01/2015	10/16/2015	0	12
7	<a href="#">Bid Selection</a>	06050	10/19/2015	10/20/2015	10/19/2015	10/20/2015	0	2
8	<a href="#">Prepare Bid for Agenda Item</a>	06060	10/21/2015	12/01/2015	10/20/2015	11/30/2015	0	30
9	<a href="#">Contract Agreements</a>	06080	12/17/2015	01/18/2016	12/16/2015	01/15/2016	0	23
10	<a href="#">Construction</a>		03/31/2016	07/03/2017				460
11	<a href="#">Final Acceptance</a>	07100	07/03/2017	07/03/2017	06/30/2017	06/30/2017	0	1
12	<a href="#">Construction_Final</a>	07060	12/30/2016	06/30/2017	12/30/2016	06/30/2017	0	131
13	<a href="#">BOCC Date (30-Jun-17)</a>	07050	11/14/2016	11/14/2016	11/09/2016	11/09/2016	0	1
14	<a href="#">NTP for Construction</a>	07010	03/31/2016	03/31/2016	03/31/2016	03/31/2016	0	1
15	<a href="#">Construction_Main</a>	07030	04/01/2016	11/10/2016	03/31/2016	11/09/2016	0	160
16	<a href="#">Substantial Completion</a>	07040	11/11/2016	11/11/2016	11/09/2016	11/09/2016	0	1
17	<a href="#">Admin Closeout</a>		07/04/2017	10/01/2018				455
18	<a href="#">Transfer to User Agency</a>	08020	07/04/2017	11/06/2017	07/01/2017	11/04/2017	0	90
19	<a href="#">Fiscal Closeout Form Approved</a>	08050	10/01/2018	10/01/2018			0	0

## P6 & Unifier CBS(WBS)

ORACLE

PRIMAVERA P6 EPPM

Dashboards

Portfolios

Projects

Resources

Approvals

Reports

Administration

EPS

Activities

Workspace

Team Usage

Assignments

Issues

Documents

Risks

Activities of Lonesdale Place

Schedule...

Actions

Views

Default View

ID/Code *	Name *		CBS	Start	Finish	Remaining Duration	Activity % Complete
06050	Bid Selection		06 06100 S.1.1	19-Oct-15 12:00 AM A	20-Oct-15 12:00 AM A	0.0d	100%
06060	Prepare Bid for Agenda Item		06 06100 S.1.1	20-Oct-15 12:00 AM A	30-Nov-15 08:00 AM A	0.0d	100%
06080	Contract Agreements		06 06100 S.1.1	16-Dec-15 12:00 AM A	15-Jan-16 12:00 AM A	0.0d	100%
06030	Bid Opening (C)		06 06100 S.1.1	29-Sep-15 12:00 AM A	30-Sep-15 05:00 PM A	0.0d	100%
06070	BOCC Award (C)		06 06100 S.1.1	16-Dec-15 12:00 AM A	16-Dec-15 12:00 AM A	0.0d	100%
06020	Bid Advertisement (C)		06 06100 S.1.1	21-Aug-15 12:00 AM A	28-Sep-15 12:00 AM A	0.0d	100%
06010	Contract Preparation		01 01750 O.1.1	20-Apr-15 12:00 AM A	05-Jul-15 05:00 PM A	0.0d	100%
07	Construction						

Download

General

Assignments

Codes

Discussion

Documents

Expenses

Issues

Notebooks

Relationships

Risks

Status

Steps

Update History

Trac

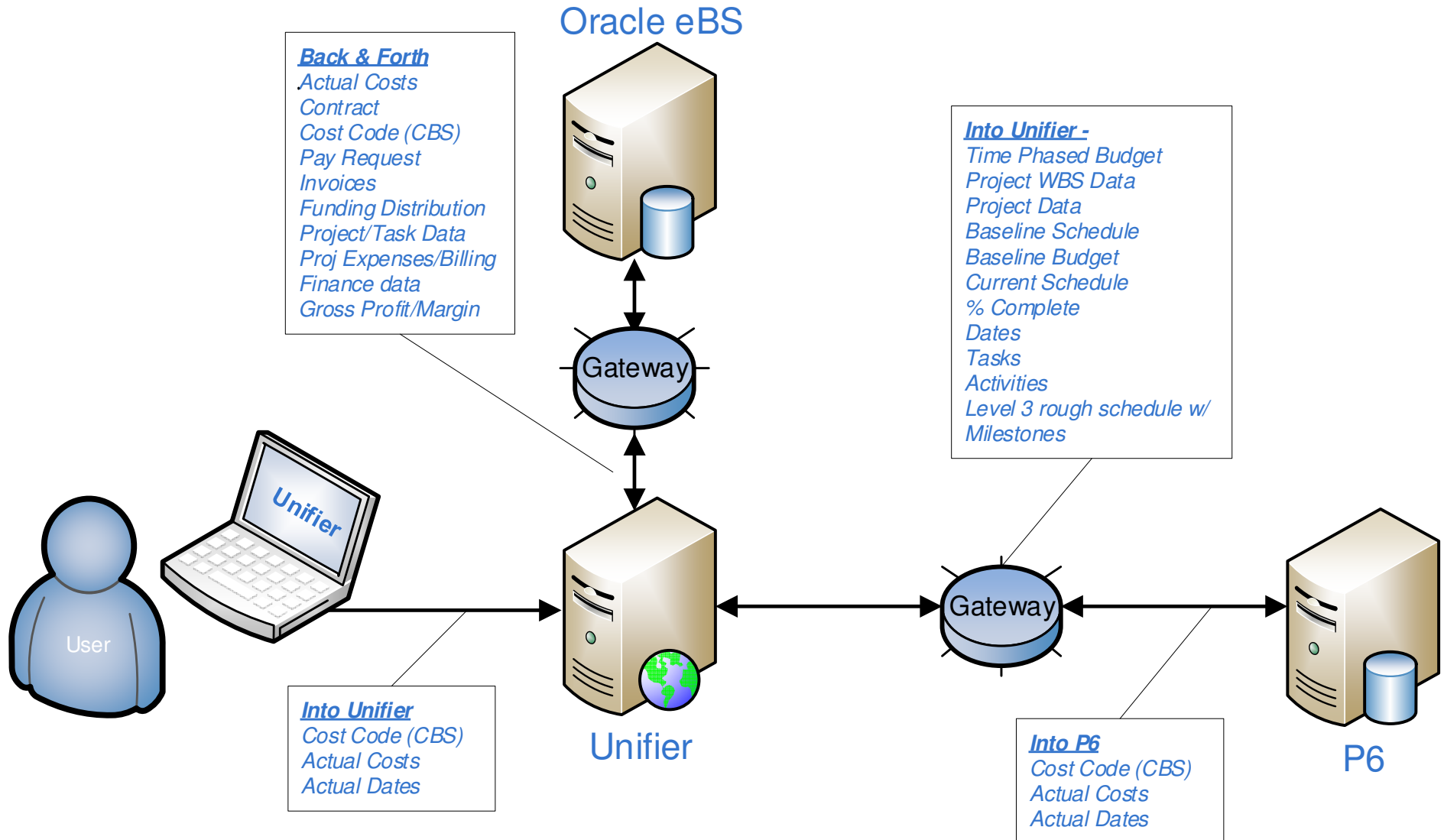
+ Add

CBS	Expense Item *	Planned Cost *	Actual Cost	Expense Category	Planned Units *	Actual Units	R
06 06100 S.1.1	Labor Lumpsum	1,000	1,000	CIT III	1.00	1.00	

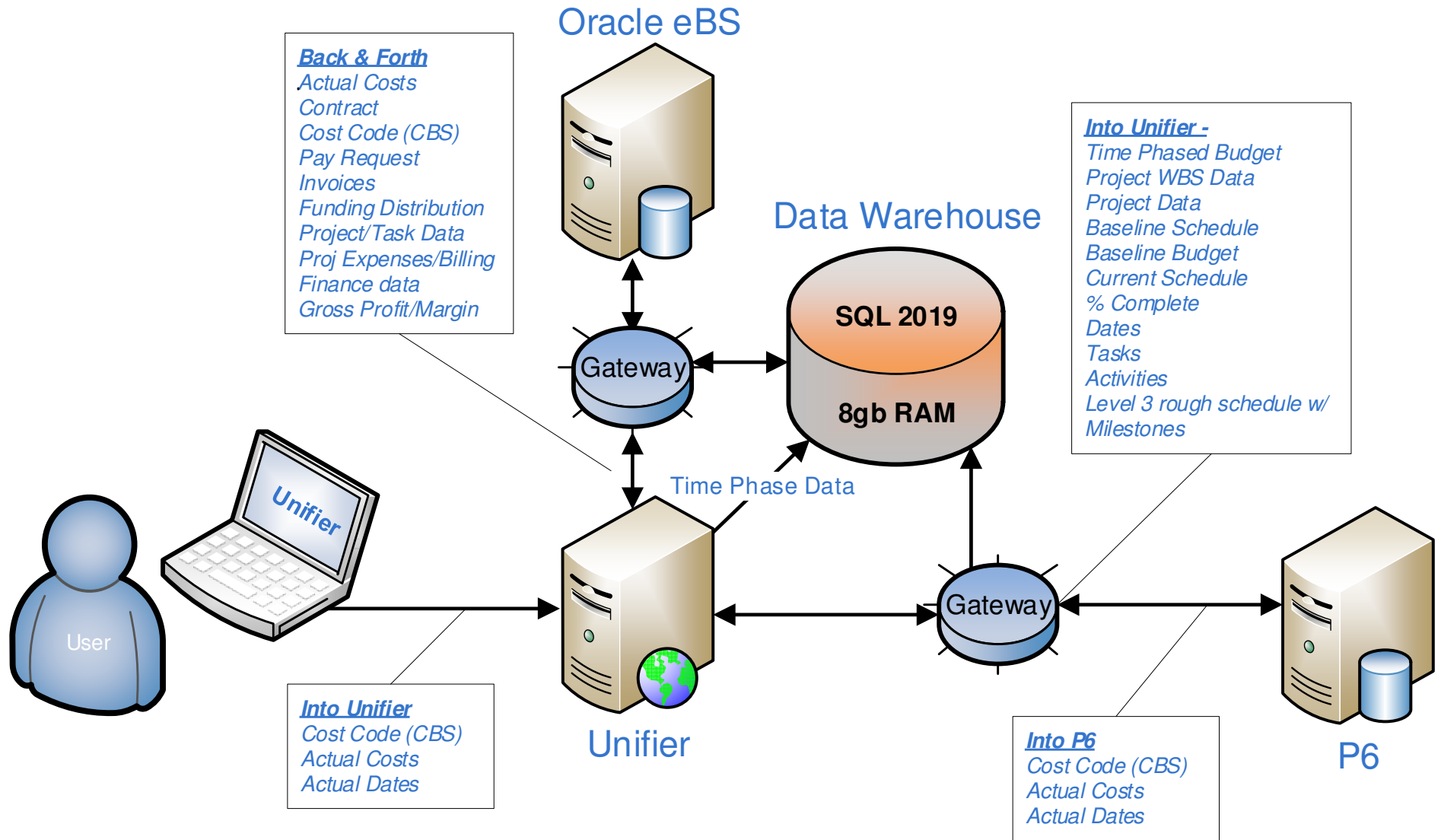
# System Demo

- Gateway Unifier & P6
- Demo
- P6 Summary Sheet
- Unifier Cost Sheet
- Cash Flow Curve
- Follow-ups
- Question and Comments

# Unifier & P6 through Gateway



# Data Storage For Analytics





# Unifier & P6 through Gateway

ORACLE

PRIMAVERA Gateway

☰

Data Dictionary

+

+

Flow Type

Synchronizations

Monitoring

Configuration

Synchronizations

Filter

All Synchronizations by Type

Value

All

+ Add...

Edit...

Run

Actions

↺

🔍

Synchronization Name	Business Flow	Description
Create P6 EPS in Prime as EPS code	Create EPS Code in Prime	
Create project header - P6 to Prime	Create project header - P6 to Prime	
Create project header- Prime to P6	Create project header- Prime to P6	
Create Workspace structure in P6 as Prime Wo...	Create Workspace Code in P6	
Get Activity data from P6	Get Activity data from P6	The flow sends activity sheet information from P6 to unifier and sync P6 and Unifier projects.
Lim Test	Get Activity data from P6	
Lim Test2	Master Data Flow	
Run P6 Export Project Data Flow for create event	P6 Export Project Data Flow for Eventing	
Run P6 Export Project Data Flow for update event	P6 Export Project Data Flow for Eventing	
Sample Import Project Synchronization	Sample Import Project Data Flow	
Send Activity data to P6	Send Activity data to P6	The flow sends activity data from Unifier to P6.
Send Approved Budget & Plan dates from Prim...	Send Approved Budget & Plan dates fr...	
Send P6 project data to Prime	Send P6 project data to Prime	
Send P6 project data to Prime for Risks	Send P6 project data to Prime for Risks	
Send P6 project data to Prime for Schedule	Send P6 project data to Prime for Sch...	
Send P6 project data to Prime for Scope	Send P6 project data to Prime for Scope	
Send P6 Resources and Roles to Prime	Send Resources and Roles to Prime	
Send P6 Resources to Prime	Send Resources to Prime	
Send P6 Roles to Prime	Send Roles to Prime	
Send Planned Budget & Plan dates from P6 to ...	Send Planned Budget & Plan dates fr...	
Send Prime project data to P6	Send Prime project data to P6	
Send Project Actual Cost & progress from P6 to...	Send Project Actual Cost & progress f...	
Send Proposed Budget & Plan dates from Prim...	Send Proposed Budget & Plan dates f...	
Send to Primavera Unifier	Send to Primavera Unifier	The flow sends CBS data (duration summary, expense spread, resource spread) and WB...
Update from Primavera Unifier	Update from Primavera Unifier	The flow sends CBS code data from Unifier to P6.

# Unifier & P6 through Gateway

ORACLE PRIMAVERA P6 EPPM

Dashboards ▾ Portfolios ▾ **Projects ▾** Resources Approvals Reports Administration

EPS **Activities** Workspace Team Usage Assignments Issues Documents Risks

### Activities of Lonesdale Place

Schedule... **Actions ▾** Views Default View ▾ [Grid] [List] [Split] [Filter] [Zoom] [Print] [Close] [Search]

ID/Code *	CBS	Start	Finish
◆ 07100	07 07900 V.1.1	30-Jun-17 05:00 PM A	30-Jun-17 05:00 PM A
■ 07060	07 07900 V.1.1	30-Dec-16 12:00 AM A	30-Jun-17 05:00 PM A
◆ 07050		09-Nov-16 12:00 AM A	09-Nov-16 12:00 AM A
◆ 07010		31-Mar-16 08:00 AM A	31-Mar-16 08:00 AM A
■ 07030		31-Mar-16 12:00 AM A	09-Nov-16 12:00 AM A
◆ 07040		09-Nov-16 12:00 AM A	09-Nov-16 12:00 AM A
⊕ ■ 08			

Download

**Actions Menu:**

- Define Baselines
- Apply Actuals
- Check Schedule
- Dissolve
- Exchange Data** ▸
  - Import CBS Codes
  - Send to Primavera Unifier**
  - Send to Schedule Sheet
- Import ▸
- Leveler
- Link Selected Activities
- Open Dependent Projects
- Publish Projects



# Unifier & P6 through Gateway

Send to Primavera Unifier

X

Select data to send to Unifier Summary sheet or Activity Sheet

☒Summary Sheet

☒Summary and Spread Data

☐WBS Hierarchy

☐Activity Sheet

☐Activity Data

Project ID	Project Name	Data Date	Schedule Type	Baselines	
46132023	Lonesdale Place	31-Jul-18 11:59 PM	Cost Loaded		⋮

Cancel

Send

# P6 Activity Data

ORACLE

PRIMA

File

Edit

View

Columns

Find:

Close Window

CIP Projects

Alerts

Mailbox

Task Manager

Information

Document Manager

Financial Transacti...

Change Managem...

Financial Reporting

Cash Flow

Cost Sheet

Submittal Manager

RFI Manager

Schedule Manager

Schedule Sheets

Activity Sheet

P6 Summary Sheets

Communication & ...

Ongoing Reporting

Project Closeout

Reports

Lonesdale Place

Activity ID	Activity Name	Activity Status	Activity Type	Actual Duration	Actual Finish	Actual Start
03010	NTP for Design (DRMP)	Completed	Start Milestone	0.00	10/15/2013	10/15/2013
03040	60% Design	Completed	Task Dependent	960.00	01/28/2014	10/01/2013
03050	60% Design Review	Completed	Task Dependent	152.00	02/18/2014	01/31/2014
03060	90% Design	Completed	Task Dependent	240.00	03/14/2014	02/13/2014
03070	90% Design Review	Completed	Task Dependent	120.00	03/29/2014	03/15/2014
03080	Final Design	Completed	Task Dependent	1,056.00	08/08/2014	03/30/2014
03090	Final Design Review	Completed	Task Dependent	1,422.00	02/01/2015	08/08/2014
06010	Contract Preparation	Completed	Task Dependent	616.00	07/05/2015	04/20/2015
06020	Bid Advertisement (C)	Completed	Task Dependent	304.00	09/28/2015	08/21/2015
06030	Bid Opening (C)	Completed	Task Dependent	16.00	09/30/2015	09/29/2015
06040	Bid Evaluation	Completed	Task Dependent	128.00	10/16/2015	10/01/2015
06050	Bid Selection	Completed	Task Dependent	8.00	10/20/2015	10/19/2015
06060	Prepare Bid for Agenda...	Completed	Task Dependent	328.00	11/30/2015	10/20/2015
06070	BOCC Award (C)	Completed	Finish Milestone	0.00	12/16/2015	12/16/2015
06080	Contract Agreements	Completed	Task Dependent	296.00	01/20/2016	12/14/2015
07010	NTP for Construction	Completed	Start Milestone	0.00	03/31/2016	03/31/2016
07030	Construction, Main	Completed	Task Dependent	1,784.00	11/09/2016	03/31/2016
07040	Substantial Completion	Completed	Finish Milestone	0.00	11/09/2016	11/09/2016
07050	BOCC Date (30-Jun-17)	Completed	Finish Milestone	0.00	11/09/2016	11/09/2016
07060	Construction, Final	Completed	Task Dependent	1,464.00	06/30/2017	12/30/2016
07100	Final Acceptance	Completed	Finish Milestone	0.00	06/30/2017	06/30/2017
08020	Transfer to User Agency	Completed	Task Dependent	1,112.00	11/22/2017	07/06/2017

## P6 Summary Data

[illegible]

# Re-Cap

- P6 Dates Linked to Unifier Schedule Sheet
- P6 Activities Related to (CBS) WBS - Activity Sheet
- P6 Summary Sheet (summarized cost in Unifier from P6)
- Unifier Cost Sheet & Summary Sheet options for Cash Flow Curve
- Time Phasing Your Project Data / Data Warehouse

# Follow-ups

- Audience/ Assignment to do...
  - ❑ This can be a Real World Example:
    - **Cause:** This can be something that is happening in your project or organization over & over, i.e. data quality issue, schedule/cost mismatch, visibility issue, data not being captured, etc.
    - **Problem:** What is the major problem/pain this is causing ? describe the critical issue/pain point for your company/organization i.e. cost re-work, missing data, bad reporting, compliance fines, etc.
    - **Desired Solution:** What innovative solution would benefit your organization ? and allow you to fix this issue/problem ? What would you like to have the capability to do / to see / to create ?
  - ❑ DRMcNatty will follow up with some of your solution's needs in our next Installment of Webinar Series and work with you personally behind the scenes to address your desired solution

# Questions & Comments

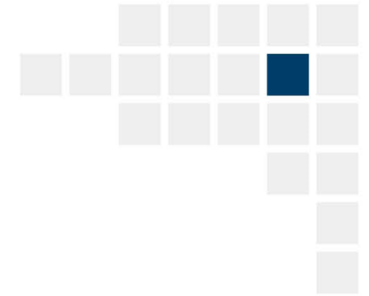
- All questions are gathered into a master sheet, answered and distributed to all registrants as well as posted on our website.
- Answers are based on our own experiences using the various software products covered in this webinar.

## Thank you for participating

Contact - [contact@drmcnatty.com](mailto:contact@drmcnatty.com)



# Upcoming Events



Construction  
**CPM**  
Conference

January 20 - 23, 2019  
Sheraton San Diego, CA



AACE Western Winter Workshop  
March 21 - 24, 2019  
Harrah's Lake Tahoe

 WESTERN WINTER  
WORKSHOP

 AACE  
REGION 6

[www.westernwinterworkshop.com](http://www.westernwinterworkshop.com)

2019 AACE International  
Conference & Expo



June 16 - 19, 2019  
Sheraton New Orleans  
New Orleans, LA, USA

 AACE  
INTERNATIONAL

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