

TECH TIP

SENDING P6 DATA TO UNIFIER SCHEDULE SHEET ORACLE PRIMAVERA UNIFIER

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**

渝	Company Work Lones	dale Place	CIP Projects	Edit Company - Google Chrome					
đ	DRMcnatty	Con	npany Workspace	https://unifierdemo18.mlmprojectservices.com/bp/admin/company/getSiteAdminComp	banylı				
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4	Programs			(JPEG/GIF & 500W x 300H pixels) Remove Authentication Key:					
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۲	Custom Dashboard			Bid Management Account Company Administrator Select					
	System Reports			Owner: 🗹 Enable Custom Dashboards:					
	Configuration Package Management	\oplus		Maximum Limit for UDR records: 1,000,000					
				Display element for Project / Shell: Name O Number					

These tech tips are offered free of charge in the spirit of sharing knowledge with others. They do not include technical support, should you have a problem with them. We are always interested in how they can be improved, please do not hesitate to enail us your comments. These tips have been thoroughly tested by our consultants in a variety of environments. Please read these tech tips thoroughly and be sure that you understand them before trying to use them. We can not be responsible for issues that develop because of the configuration of your hardware, technical environment or application of the tech memos. If you are not sure, then we urge you to constact Oracle technical support consultant for assistance

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.

Dashboards - Portfolios	Projects - Resources Approvals Reports Administration	
Application Settings Ent	erprise Data Scheduled Services User Administration User Interface Views	
Application Settings		
Audit	General	Save Save and Close Cancel
Consent Notice	Starting Day of Week	Document Management
Data Limits	First day of week for calendars	Enter the P6 URL to enable users to view content repository documents in the P6 Professional module
Earned Value	Sunday 🔻	P6 URL
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Gateway	Default duration for new activities *	Security Policy
General	5.0d	Personal 👻
ID Lengths	Codes	Unifier
Reports	Code separator character *	Primavera Unifier URL
Services		
Timesheets	Exactly one character.	
Time Periods	Specify how to display code values Name	Company Short Name
	Description	At most 255 characters long.
	Industry Selection	Authentication Code
	Industry to use for terminology and default calculation settings in the P6 Professional module	
		P6 Professional Applications
	Password Policy	Run in Secure Global Desktop environment
	Enable	

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**

Garces Highwa	Kansas Avenue	Pond Road Viad…	Tulare Street U	Fargo Avenue	American Aven +
> Construction Pac >	Kansas Avenue				
Projects - Details - Google Ch	irome			- 🗆 🗙	Details
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General	Currency Op	otions Links	Calendar	Integration	
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In P6 EPPM > go to the **Projects** Tab > Navigate to your "Project" > Select **Set Project Preferences**

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	GAMA - B1	Project Gama - Base Cost Loaded	20-May-19	20-May-19
	DELTA	Project Delta	20-May-19	20-May-19
	HAYWARD	Hayward Maintenance Complex	20-May-19	20-May-19
	TRANSBAY	Transbay Corridor Core Capacity	20-May-19	20-May-19
	AMERAVE	American Avenue Grade Separation	08-Jan-18 A	01-Aug-19
	KENAVE	Kent Avenue Grade Separation	01-Jan-18 A	01-Aug-19
	PONDVIA	Pond Road Viaduct	01-Nov-18	20-May-19
	FRESTREN	Fresno Trench & State Route 180 Passageway	02-Jan-18 A	01-Aug-19
0	E KANSAVE	Kansas Avenue Grade Separation	01-Aug-18	20-May-19
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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

Project Preferences of Kansas Avenue Grad	de Separation	Ø ×
General Analytics & Services Calculations Integration	Team Member	
Gateway Unifier		
Configure the settings for Unifier integration.		
Schedule Sheet Integration	Summary Sheet Integration	
 Link project to a Primavera Unifier project 	Schedule Type	
Project Name	Cost Loaded	-
Kansas Avenue Grade Separation	Synchronize WBS Hierarchy	
Schedule Sheet	Complete	-
Kansas P6 Schedule		
Data Mapping	_	
P6 Data Mapping		
Delete activities no longer in the P6 Schedule from Primav Unifier	vera	
Only send activities with CBS codes assigned		
	I	Cancel OK



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

Da	shboards 👻	Portfolios - Proje	ects -	Resources	Appro	vals	Reports	Admi	inistratio	n	
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		Publish Projects	ecis	↓ Send	to Schedul	e Sheet					
		Recalculate Assignme	nt Costs								
		Store Period Performa	nce								
		Summarize Projects									

Click > OK





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

View Log C View Service Status Service Status Submitted Completed Initiator Project: Send To Schedule Sheet Completed 15-Aug-19 GMT-0 I5-Aug-19 GMT-0 Kevin Hicks KANSAVE - Kansas Avenue Grade Separ					My Preferences
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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

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	Activity Sheet	2	Begin Planning & Environmental	PE-1000	05/15/2019	05/15/20		
23	Communication & Followup	3	Environmental Impact Study	PE-1010	05/24/2019	09/13/20		
Q	Ongoing Reporting	4	Draft EIS/EIR	PE-1020	09/09/2019	01/31/202		
	Project Closeout	5	Review / Approve Final EIS/EIR	PE-1030	01/27/2020	05/15/202		
	Reports 🖯	6	Planning and Environmental Com	. PE-1040	05/15/2020	05/15/202		
		7	Design Engineering		05/18/2020	12/25/202		



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

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	Activity Sheet		Notify	users and/or groups on errors:	_	Selec	t [
23	Communication & Followup	•			Enforce Activity Level Pe	ermissions by Group						
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General		Gantt Chart	Tracking Gantt	Options	Schedule			
Options								
	Auto update	e activity status based o	n Actual Start / Finish Dat	es				
	Activity Pro	gress requires an Actua	l Start date					
	Enforce Act	ivity 100% Complete ag	ainst Actual Finish date					
Auto-Update % Complete to 100% after entering Actual Finish date								

Gantt Chart	Tracking Gantt	Options	Schedule
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Double Click on your Created Schedule Sheet > Click File > Data Mapping

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Ø	Ongoing Reporting	$ \bigcirc $		p Scope Management get and Progress Setup		al Com	PE-1040	05/15/2020	05/15/2020
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			10	60% Design Engine	ering		DE-2020	07/13/2020	09/04/2020
			11	11 <u>90% Design Engineering</u>			DE-2030	09/07/2020	10/30/2020
			12	Final Review and Ap	pproval	of De	DE-2040	11/02/2020	12/25/2020

Click on Add > Name the Mapping File "P6 Data Mapping"

Data Mappings										
	Name 🔺		Default Mapping							
	P6 Data Mappin	Ig								
	Add	Modify	Remove							
		OK	Cancel							





On the Activity Tab > Add these following Mapping Elements In the **CVS Header** and **XML Element** Columns

General	Activity	Resources	Op	Options			
Column 🔺	CSV Header	XML Elen	nent				
Activity Name	Activity Name	Name					
Activity Percent	Activity Percent	PercentC	omplete				
Actual Finish Date	Actual Finish Dat	te ActualFin	ishDate				
Actual Start Date	Actual Start Date	ActualSta	rtDate				
Duration	Duration	PlannedE	Ouration				
Finish date	Finish date	FinishDat	e				
P6 Activity Number	P6 Activity Numb	oer Id	- 1				
Start date	Start date	StartDate					
Add Re	move		Export	Imp	ort		
	ОК	Cancel					

** 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 >

	n Smpan	File	Edit View															
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Select Your Column **Data Source** from the Dropdown Menu > Set the **Column Position After** > All columns in the Screen Shot > when finished click **OK**

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When you return to the Schedule Sheet, you will now see your columns mapped to P6 data in your Unifier Schedule Sheet.

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	Document Manager	3	Environmental Impact Study	PE-1010	05/24/2019	09/13/2019			0	81				
_	Change Management		Draft EIS/EIR	PE-1020	09/09/2019	01/31/2020			0	105				
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23	Communication & Fo	10	60% Design Engineering	DE-2020	07/13/2020	09/04/2020			0	40				
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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.

