

TECH TIP

SENDING P6 DATA TO UNIFIER SCHEDULE SHEET ORACLE PRIMAVERA UNIFIER

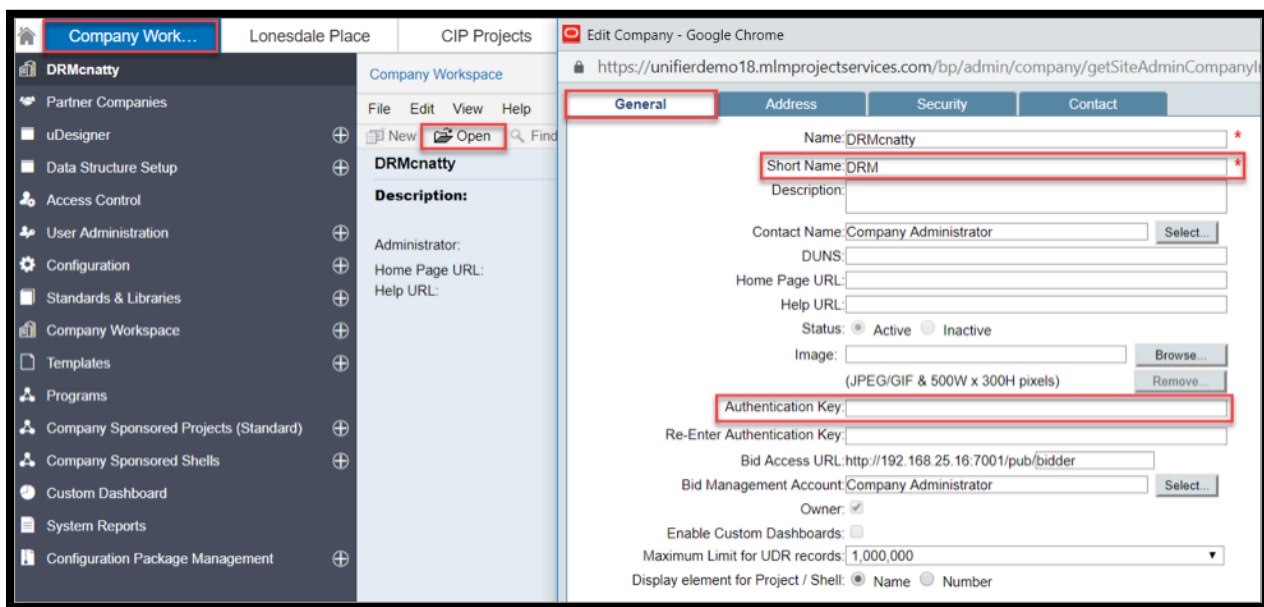
As a Unifier administrator or developer, you may have the following questions in system design:

- 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**



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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.

The screenshot shows the 'Administration' tab in the P6 EPPM interface. The 'General' sub-tab is selected. The 'General' section contains settings for the application, including the starting day of the week, activity duration, codes, and industry selection. The 'Document Management' section includes the P6 URL. The 'Unifier' section includes the Primavera Unifier URL, company short name, and authentication code. The 'P6 Professional Applications' section includes a checkbox for running in a secure global desktop environment. The 'Save and Close' button is highlighted with a red box.

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**

The screenshot shows the 'Projects' tab in the P6 EPPM interface. The 'General' sub-tab is selected for the 'KANSAVE' project. The 'Enterprise Project Structure' table lists various projects, with 'KANSAVE - Kansas Avenue Grade Separation' highlighted. The 'Details' section shows the 'Project ID' as 'KANSAVE', 'Project Status' as 'Active', 'Project Name' as 'Kansas Avenue Grade Separation', 'Location' as 'Energy', and 'Responsible Manager' as 'Energy'. The 'Planned Dates' section shows 'Anticipated Start' as '01-Aug-18' and 'Anticipated Finish' as '01-Aug-18'. The 'Project ID' field is highlighted with a red box.

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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**

The screenshot shows the 'Project Details' form in the Unifier application. The 'General' tab is selected. The 'Project Name' is 'Kansas Avenue Grade Separati'. The 'Project Number' is 'P-0015'. The 'P6 Project ID' is 'KANSAVE'. The 'Status' is 'Active'. The 'Administrator' is 'Kevin Hicks'. The 'Hierarchy Path' is 'CENTRAL VAL'. The 'Sections Phase I' is 'Fresno - Bakersfield'. The 'Project Start Date' is '08/01/2018'. The 'Project End Date' is empty. The 'Estimated Budget' is '0.00'. The 'Schedule Type' is 'Cost Loaded'. The 'Description' field is empty. The 'Apply', 'OK', and 'Cancel' buttons are at the bottom.

In P6 EPPM > go to the **Projects** Tab > Navigate to your "Project" > Select **Set Project Preferences**

The screenshot shows the 'Enterprise Project Structure' table in the P6 EPPM application. The 'Projects' tab is selected. The table lists various projects, including 'KANSERVE' (Kansas Avenue Grade Separation). The 'Set Project Preferences' button is highlighted in the context menu for the 'KANSERVE' project.

ID	Name	Start	Data Date
GAMA	Project Gama	20-May-19 A	04-Jan-21
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
KANSERVE	Kansas Avenue Grade Separation	01-Aug-18	20-May-19

SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

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 Grade Separation

General Analytics & Services Calculations **Integrations** Team Member

Gateway **Unifier**

Configure the settings for Unifier integration.

Schedule Sheet Integration

- ☒ Link project to a Primavera Unifier project
- Project Name**
Kansas Avenue Grade Separation
- Schedule Sheet**
Kansas P6 Schedule
- Data Mapping**
P6 Data Mapping
- ☒ Delete activities no longer in the P6 Schedule from Primavera Unifier
- ☐ Only send activities with CBS codes assigned

Summary Sheet Integration

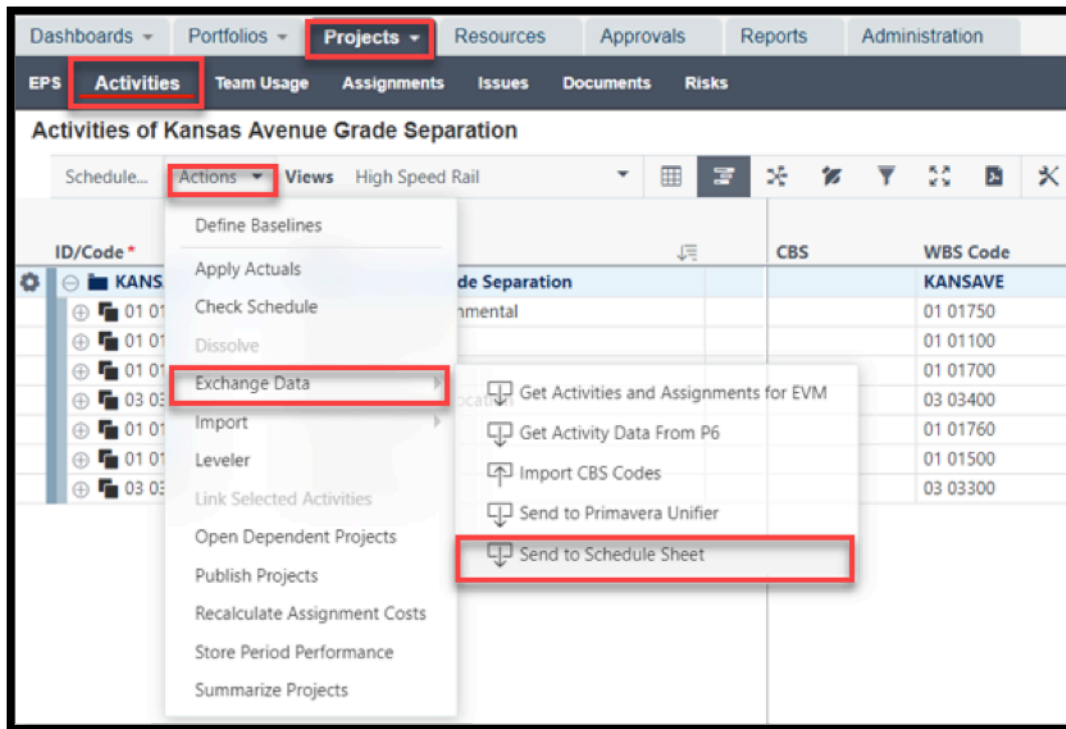
Schedule Type
Cost Loaded

☐ Synchronize WBS Hierarchy
Complete

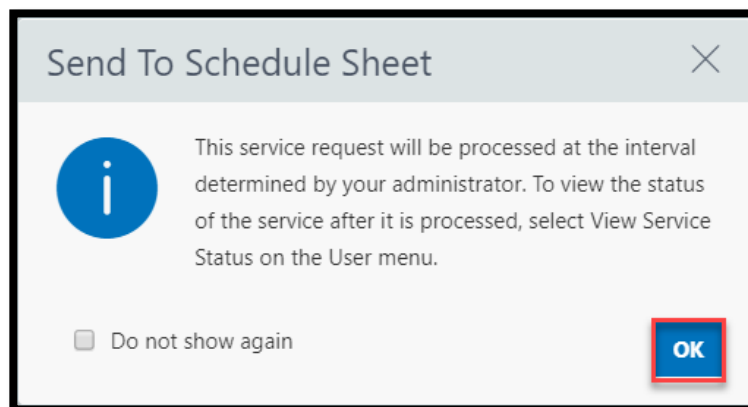
Cancel **OK**

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

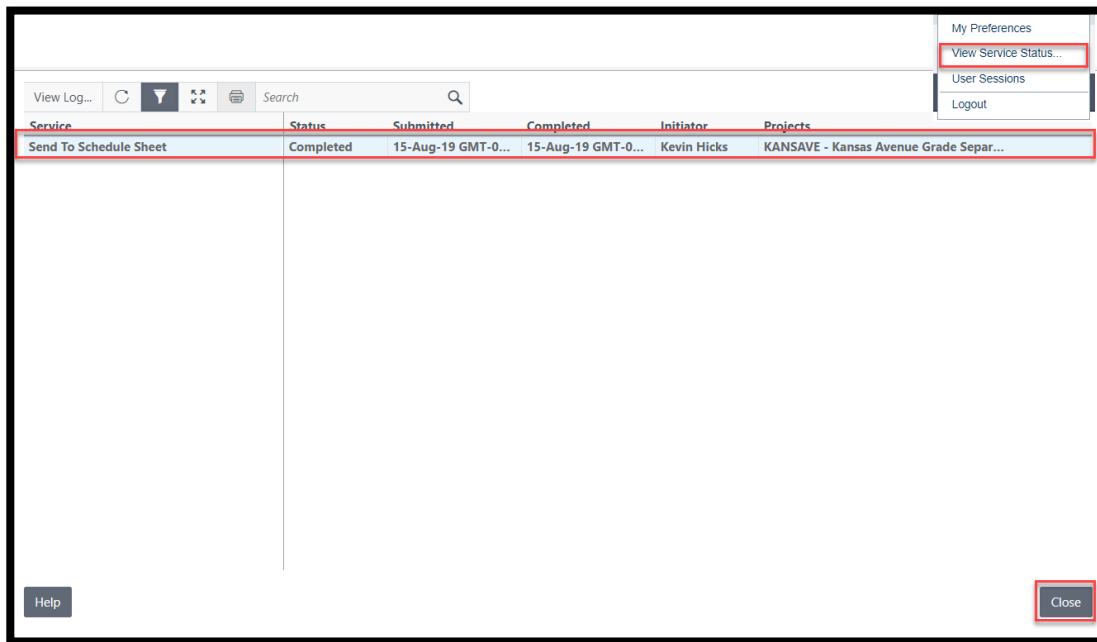


Click > **OK**

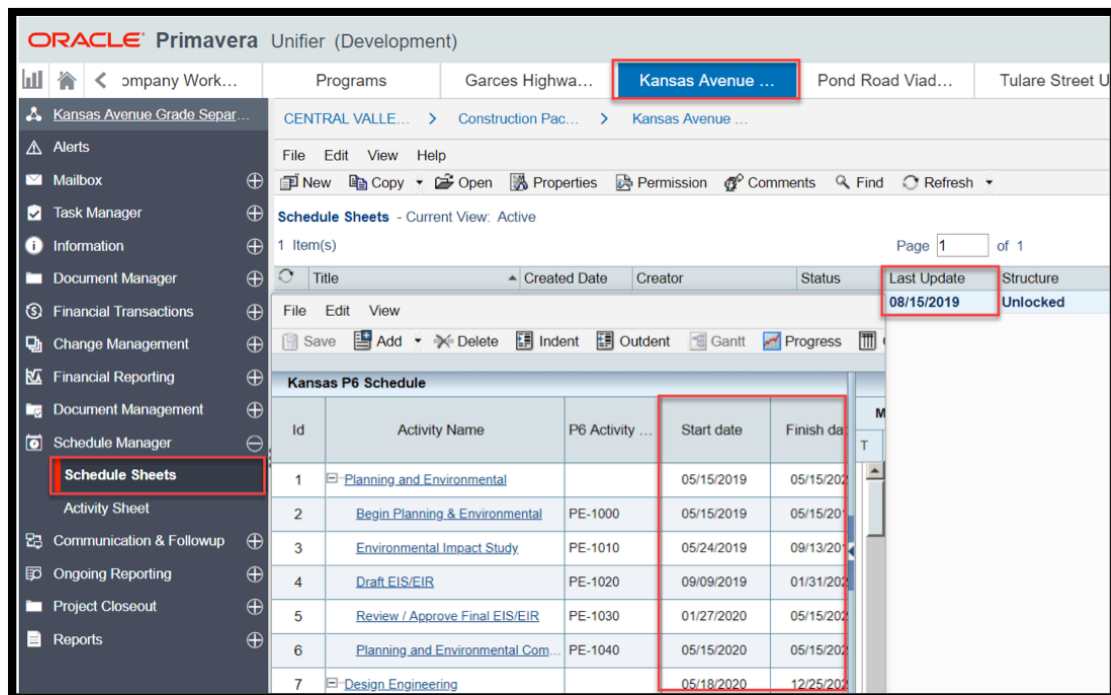


SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

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



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



SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

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**

The screenshot shows the 'Schedule Sheet Properties' dialog box in the Unifier application. The 'General' tab is selected. The 'Schedule Title' is 'Kansas P6 Schedule'. The 'Status' is set to 'Active'. The 'Schedule Start Date' is '05/15/2019'. The 'Options' tab is also visible, showing 'Activity Progress requires an Actual Start date' checked.

The screenshot shows the 'Options' tab of the 'Schedule Sheet Properties' dialog box. The 'Activity Progress requires an Actual Start date' checkbox is checked. Other options include 'Auto update activity status based on Actual Start / Finish Dates', 'Enforce Activity 100% Complete against Actual Finish date', and 'Auto-Update % Complete to 100% after entering Actual Finish date'.

The screenshot shows the 'Schedule' tab of the 'Schedule Sheet Properties' dialog box. The 'Enable scheduled refresh' checkbox is checked. The 'Frequency' section shows 'Daily' selected. The 'Range of Recurrence' section shows 'No end date' selected.

SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

Double Click on your Created Schedule Sheet > Click **File** > **Data Mapping**

The screenshot shows the Unifier Schedule Manager interface. The left sidebar contains a navigation menu with 'Schedule Sheets' highlighted. The main window displays a list of schedule sheets, with 'Kansas P6 Schedule' selected. The 'File' menu is open, and 'Data Mapping' is highlighted. The background shows a Gantt chart view of a project schedule.

	P6 Activity ...	Start date	Finish date
	PE-1000	05/15/2019	05/15/2019
	PE-1010	05/24/2019	09/13/2019
	PE-1020	09/09/2019	01/31/2020
	PE-1030	01/27/2020	05/15/2020
	PE-1040	05/15/2020	05/15/2020
		05/18/2020	12/25/2020
	DE-2000	05/18/2020	05/18/2020
9	30% Design Engineering	DE-2010	05/22/2020
10	60% Design Engineering	DE-2020	07/13/2020
11	90% Design Engineering	DE-2030	09/07/2020
12	Final Review and Approval of De...	DE-2040	11/02/2020

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

The 'Data Mappings' dialog box is shown. It has a table with two columns: 'Name' and 'Default Mapping'. The entry 'P6 Data Mapping' is listed with a checked checkbox in the 'Default Mapping' column. Below the table are buttons for 'Add...', 'Modify...', and 'Remove'. At the bottom are 'OK' and 'Cancel' buttons.

Name	Default Mapping
P6 Data Mapping	<input checked="" type="checkbox"/>

SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

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

**** Pay close attention to the Case Sensitive text and word spacing**

The screenshot shows the 'Activity' tab in a software interface. It contains a table with three columns: 'Column', 'CSV Header', and 'XML Element'. The table lists the following mappings:

Column	CSV Header	XML Element
Activity Name	Activity Name	Name
Activity Percent	Activity Percent	PercentComplete
Actual Finish Date	Actual Finish Date	ActualFinishDate
Actual Start Date	Actual Start Date	ActualStartDate
Duration	Duration	PlannedDuration
Finish date	Finish date	FinishDate
P6 Activity Number	P6 Activity Number	Id
Start date	Start date	StartDate

Below the table are buttons for 'Add...', 'Remove', 'Export...', and 'Import...'. At the bottom are 'OK' and 'Cancel' buttons.

On **Options** Tab - Select Overwrite Existing Schedule and Activities Box in both places > Click **OK**

The screenshot shows the 'Options' tab in the same software interface. It is divided into two sections: 'XML Import' and 'XML Export'.

XML Import

- Options:
 - ☐ Merge into existing schedule
 - ☐ Delete Activities removed from source schedule
 - ☒ Overwrite existing schedule
- Data Elements:
 - ☒ Activities
 - ☐ Activity Dependencies
 - ☐ Activity Calendar
 - ☐ Resource Assignments
 - ☐ CBS Codes
- Number of Levels:
- Suffix Mask:
 - ☒ Constant
 - ☐ Data Element

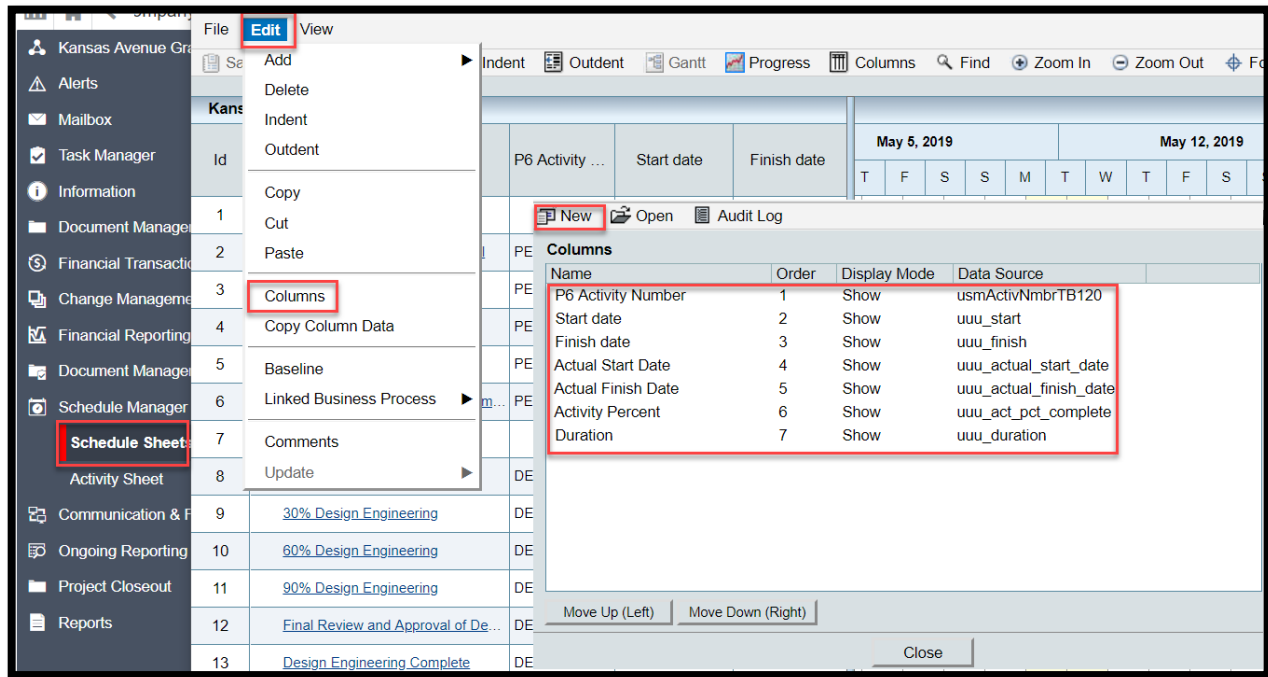
XML Export

- Data Elements:
 - ☒ Activities
 - ☐ Activity Dependencies
 - ☐ Resource Assignments
 - ☐ CBS Codes

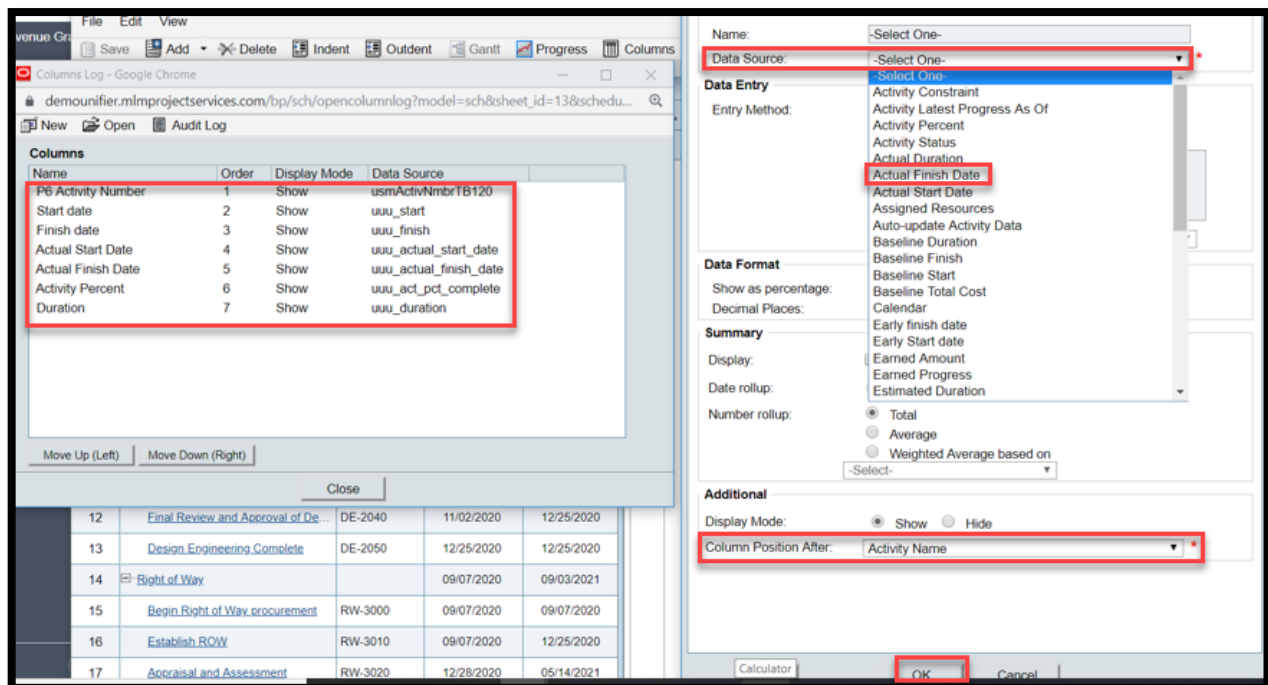
At the bottom are 'OK' and 'Cancel' buttons.

SENDING P6 DATA TO UNIFIER SCHEDULE SHEET

Next Open your P6 Schedule Sheet > Click **Edit** > Select **Columns** > Click **New** >

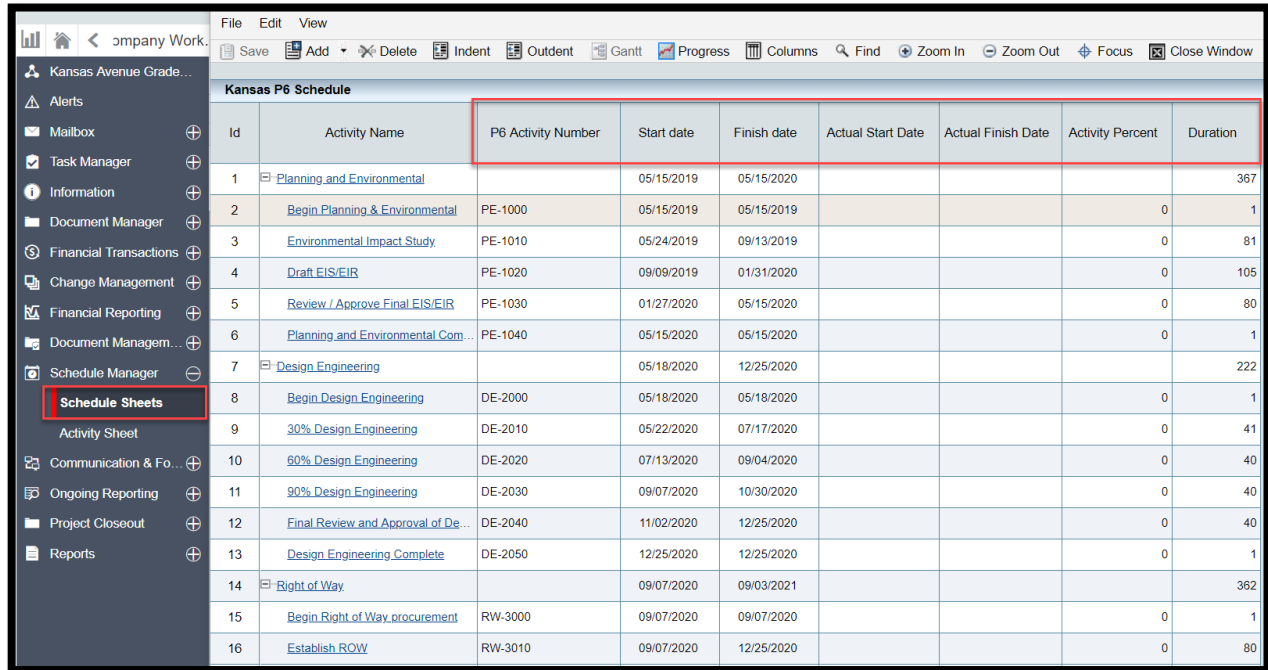


Select Your Column **Data Source** from the Dropdown Menu > Set the **Column Position After** > All columns in the Screen Shot > when finished click **OK**



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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.



Kansas P6 Schedule								
Id	Activity Name	P6 Activity Number	Start date	Finish date	Actual Start Date	Actual Finish Date	Activity Percent	Duration
1	Planning and Environmental		05/15/2019	05/15/2020				367
2	Begin Planning & Environmental	PE-1000	05/15/2019	05/15/2019			0	1
3	Environmental Impact Study	PE-1010	05/24/2019	09/13/2019			0	81
4	Draft EIS/EIR	PE-1020	09/09/2019	01/31/2020			0	105
5	Review / Approve Final EIS/EIR	PE-1030	01/27/2020	05/15/2020			0	80
6	Planning and Environmental Com...	PE-1040	05/15/2020	05/15/2020			0	1
7	Design Engineering		05/18/2020	12/25/2020				222
8	Begin Design Engineering	DE-2000	05/18/2020	05/18/2020			0	1
9	30% Design Engineering	DE-2010	05/22/2020	07/17/2020			0	41
10	60% Design Engineering	DE-2020	07/13/2020	09/04/2020			0	40
11	90% Design Engineering	DE-2030	09/07/2020	10/30/2020			0	40
12	Final Review and Approval of De...	DE-2040	11/02/2020	12/25/2020			0	40
13	Design Engineering Complete	DE-2050	12/25/2020	12/25/2020			0	1
14	Right of Way		09/07/2020	09/03/2021				362
15	Begin Right of Way procurement	RW-3000	09/07/2020	09/07/2020			0	1
16	Establish ROW	RW-3010	09/07/2020	12/25/2020			0	80

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.