

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	Lonesdale Place	CIP Projects	Edit Company - Google Chrome	
đ	DRMcnatty	Cor	npany Workspace	https://unifierdemo18.mlmprojectservices.com/bp/admin/company/getSiteAdminCompany/getS	nylı
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	uDesigner	0 🗇	New 🗳 Open 🔍 Find	Name: DRMcnatty *	
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đ	Company Workspace	\oplus		Status: Active Inactive	
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۲	Custom Dashboard			Bid Management Account Company Administrator Select	
	System Reports			Enable Custom Dashboards:	
	Configuration Package Managem	nent 🕀		Maximum Limit for UDR records: 1,000,000	
				Display element for Project / Shell: Name 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 Ente	rprise 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
Eventing	Activity Duration	
Gateway	Default duration for new activities *	Security Policy
General	5.0d	Personal 💌
ID Lengths	Codes	Unifier
Reports	Code separator character *	Primavera Unifier URL
Services	- Events an elementer	
Timesheets	Specify how to display code values	Company Short Name
Time Periods	Name Description	
	Industry Selection	At most 255 characters long.
	Industry to use for terminology and default calculation settings in the P6 Professional module	
	Password Policy	P6 Professional Applications
		Run in Secure Global Desktop environment

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 Via	d T	ulare Street U	Fargo Avenue	American Aven +
>	Construction Pac >	Kansas Avenue					
0	Projects - Details - Google Ch	rome				– 🗆 🗙	Details
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F	Project Details General Project Nam Project Numb P6 Project Sections Phas Project Start De Estimated Budg	ne: Kansas Avenue Grade S er: P-0015 ID: KANSAVE 9 1: [Fresno - Bakersfield tte: 08/01/2018 et: [eparati * ▼ 0.00	S Adminis Hierarchy Sections Ph Project End Schedule	tatus: Active irator: Kevin Hicks Path: //CENTRAL VAL ase II: -Select- Date: Type: Cost Loaded	▼ * Select * Select *	
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		Apply	ок	Cancel	[

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

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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 01-Aug-19	
	FRESTREN	Fresno Trench & State Route 180 Passageway	02-Jan-18 A		
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	Project Preferences of Kansas Avenue Grade Separation								
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	ishboards 👻	Portfolios - Projects -	Resources	Appro	vals	Reports	Admir	nistration	
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A	ctivities of K	ansas Avenue Grade Sep	aration						
	Schedule	Actions 👻 Views High Speed	Rail	*		7 🔆 🌾	Ŧ	20 B	х
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	⊕ ™ 03 03 L	Import	ocation Get A	Call Get Activities and Assignments for				03 03400	
	① 1 01	Import	Get A	ctivity Data	From P6			01 01760	
_	① 101	Leveler	小 Impo	rt CBS Code	es			01 01500	
	⊕ € 03 03	Link Selected Activities	I Sand	to Drimaus	ra Unifier			03 03300	
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		Dublich Designts	🖵 Send	The Send to Schedule Sheet					
		Publish Projects	-						
		Recalculate Assignment Costs							
		Store Period Performance							
		Summarize Projects							
		e en contrat de la contrat							

Click > **OK**





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

View Log C Y 🕃 🖨 Sea	rch	٩				My Preferences View Service Status User Sessions Logout
Service	Status	Submitted	Completed	Initiator	Projects	
Send To Schedule Sheet	Completed	15-Aug-19 GMT-0	15-Aug-19 GMT-0	Kevin Hicks	KANSAVE - Kansas Avenue G	rade Separ
Help	I					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

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	Document Manager 🛛 🕀	ОТ	itle Create	ed Date Cre	ator	Status	Last Update	Structure	
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$\overline{\mathbf{O}}$	Schedule Manager 🗧	D	Activity Name	P6 Activity	Start date	Finish dat T	1		
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	Activity Sheet	2	Begin Planning & Environmental	PE-1000	05/15/2019	05/15/201			
23	Communication & Followup	3	Environmental Impact Study	PE-1010	05/24/2019	09/13/20	1		
Ø	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

Ш	🕋 < ompany Work	Programs	Garces Highwa	Kansas Avenue	Pond Road Viad…	Tulare Street U	Fargo Avenue	Americ	
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	Task Manager 🗧	Schedule Sheets - Curre	le Sheets - Current View: Active General Gantt Chart Tracking Gantt Options Schedule						
Û	Information	1 Item(s)	Ove	rview					
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	Documents	Kansas P6 Schedu	ile 07/	Description:					
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3	Financial Transactions	€		Master Schedule:	Create as master sched	ule sheet			
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	Activity Sheet		Notify	users and/or groups on errors:	_	Selec	t [
23	Communication & Followup	•		Permission:	Enforce Activity Level Pe	ermissions by Group			
₽	Ongoing Reporting)		Default Group:	-Select-		•		
	Project Closeout)							
	Reports)			ОК	Cancel			
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Optio	Options									
	Auto update activity status based on Actual Start / Finish Dates									
	Activity Prog	gress requires an Actual	Start date							
	Enforce Act	ivity 100% Complete ag	ainst Actual Finish date							
	Auto-Update	e % Complete to 100% a	after entering Actual Finis	h 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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₩	Financial Reporting)						05/15/2019	05/15/2020	
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	Activity Sheet	-	Res	trictions			PE-1020	09/09/2019	01/31/2020	
23	Communication & Followup)	Data	Mapping		<u>/EIR</u>	PE-1030	01/27/2020	05/15/2020	
	Ongoing Reporting)	Setu	p Scope Manage	ement	<u>ıl Com</u>	PE-1040	05/15/2020	05/15/2020	
	Project Closeout		Bud	get and Progress	Setup 🕨			05/18/2020	12/25/2020	
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			9	9 30% Design Engineering 10 60% Design Engineering 11 90% Design Engineering			DE-2010	05/22/2020	07/17/2020	
			10				DE-2020	07/13/2020	09/04/2020	
			11				DE-2030	09/07/2020	10/30/2020	
			12	Final Review	and Approva	l 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	otions	
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	I		
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 >

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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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Activit	ty Percer	t	6	Show	uuu_act_po	t_complete				Show as percentage:	Baseline Total Cost				
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	16	Establish R	WOW	R	W-3010	09/07/2020	12/25/2020	0							
	17	Appraisal a	nd Assessm	ent R	W-3020	12/28/2020	05/14/2021	1		Calculator	OK Cancel				



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	\oplus	2	Begin Planning & Environmental	PE-1000	05/15/2019	05/15/2019			0	1				
3	Financial Transactions	Ð	3	Environmental Impact Study	PE-1010	05/24/2019	09/13/2019			0	81				
Q	Change Management	\oplus	4	Draft EIS/EIR	PE-1020	09/09/2019	01/31/2020			0	105				
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			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.

