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PRIMAVERA

Primavera Portfolio Management 8.0
Data Mapping and Data Flow
for the Bridge for Primavera P6

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Overview

The Primavera Portfolio Management Project Management Bridge to Primavera P6 enables a seamless, bi-directional transfer of project information between Primavera Portfolio Management and P6. By mapping Primavera Portfolio Management items to P6 projects, the project and item data will always remain in sync.

The PM Bridge for P6 can operate in two different mapping modes: Sub-Items or Phases. Although both modes map P6 projects to Primavera Portfolio Management items, they differ in terms of the 2nd level WBS mappings. In the Sub-Items mode 2nd level WBSs are mapped to the item's sub-items, while in the Phases mode these WBSs are mapped to the item's phases.

The process of transferring item data from Primavera Portfolio Management to P6 is called "Publishing" while the process of transferring project data from P6 to Primavera Portfolio Management is called "Updating".

When an item is published for the first time, the PM Bridge creates a new project in P6 and maps it to the item. In the most basic configuration, the system creates tasks in the new project plan based either on the item's sub-items or life cycle phases, depending on whether the bridge is operating in the Sub-Items or Phases mapping mode. In methodology-based configurations the new Primavera Portfolio Management item-generated project can be created on the basis of a P6 methodology. In the Phases mode, the system may be configured to publish from Primavera Portfolio Management and update from P6 Primavera Portfolio Management item, phase and deliverable schedule information. In addition, Primavera Portfolio Management categories can be mapped to P6 fields and codes in either mapping mode, thereby supporting the transfer of category information between the two systems.

Publishing and updating can be initiated by users for specific items or for a batch of items that are collected in a portfolio. They can also be initiated automatically by the system according to a schedule. This is done by using the Sync operation set by the administrator.

Publishing Items

When an item is published for the first time, the system creates a new project in P6 with the same name as the item. The item and project are now linked, or "mapped," and can share information. This shared information typically becomes the basis for a more detailed project plan.

The Basic Elements of a Published Project

A published project's actual content depends on whether this project is based on the content of the original Primavera Portfolio Management item or on a P6 methodology that reflects standard project-related processes in the organization.

Primavera Portfolio Management Item - If based on a Primavera Portfolio Management item, depending on the mapping mode, it can be based on either the item's sub-items or its life cycle phases, as follows:

- **Sub-Items -** the project plan becomes populated with WBS elements which are created corresponding to the published item's sub-items for the sub-item type selected[1]. Each newly created WBS is named after the corresponding sub-item in Primavera Portfolio Management. Existing WBSs are matched by name to published sub-items from Primavera Portfolio Management. Once WBSs are matched to sub-items, they have become permanently "mapped" to each other for future updates. The renaming of either one will not break the mapping.

  In all publish operations, data will be published from Primavera Portfolio Management categories mapped as publishing to their corresponding project fields or codes for the mapped Item, and to WBS fields for 2nd level WBS elements matching Primavera Portfolio Management sub-items. Note that if no Primavera Portfolio Management categories are mapped to P6 fields, no data is published (not even start and end dates).

- **Phases -** the project plan becomes populated with WBS elements and milestone activities based on the item's Life Cycle information in Primavera Portfolio Management[2]. Specifically, under the Project level WBS element, several Active WBS elements are created, corresponding to and named after, the mapped item's phases. These WBS elements will be mapped to the corresponding phases for future updates. They also include the original planned dates of each phase, as recorded in Primavera Portfolio Management.

P6 Methodology - If based on a P6 methodology, the system creates a project plan populated with the WBS elements and activities with their fields and codes as prewritten in the methodology. In addition depending on the mapping mode, the system will know how to match up WBS elements with their identically-named Primavera Portfolio Management entities[3], as follows:

- **Sub-Items Mapping Mode -** If there are WBS elements in the selected P6 methodology whose names are identical to those of the sub-items of the published Primavera Portfolio Management item, the bridge will map these WBS elements to the corresponding sub-items thus enabling the sharing of sub-item information.
- **Phases Mapping Mode -** If there are WBS elements in the selected P6 methodology whose names are identical to those of the phases in the Primavera Portfolio Management item's life cycle, the bridge will map these WBS elements to their corresponding phases, thus enabling the sharing of phase and deliverable schedule information.

This methodology, which determines how new projects are created, can be selected in one of two ways:

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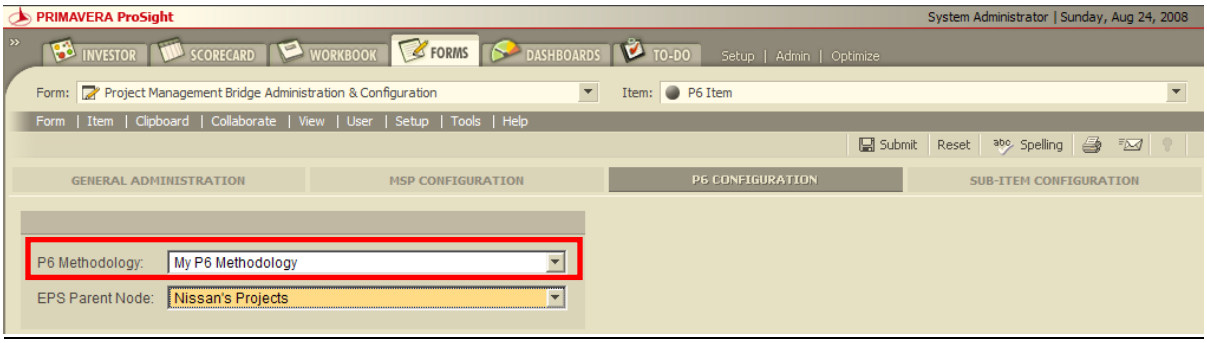
[1] If the item has no sub-items for the sub-item type selected, then the item will be published as a project without any additional elements.

[2] If a life cycle was not assigned to the item, then it will be published as a project without any other content.

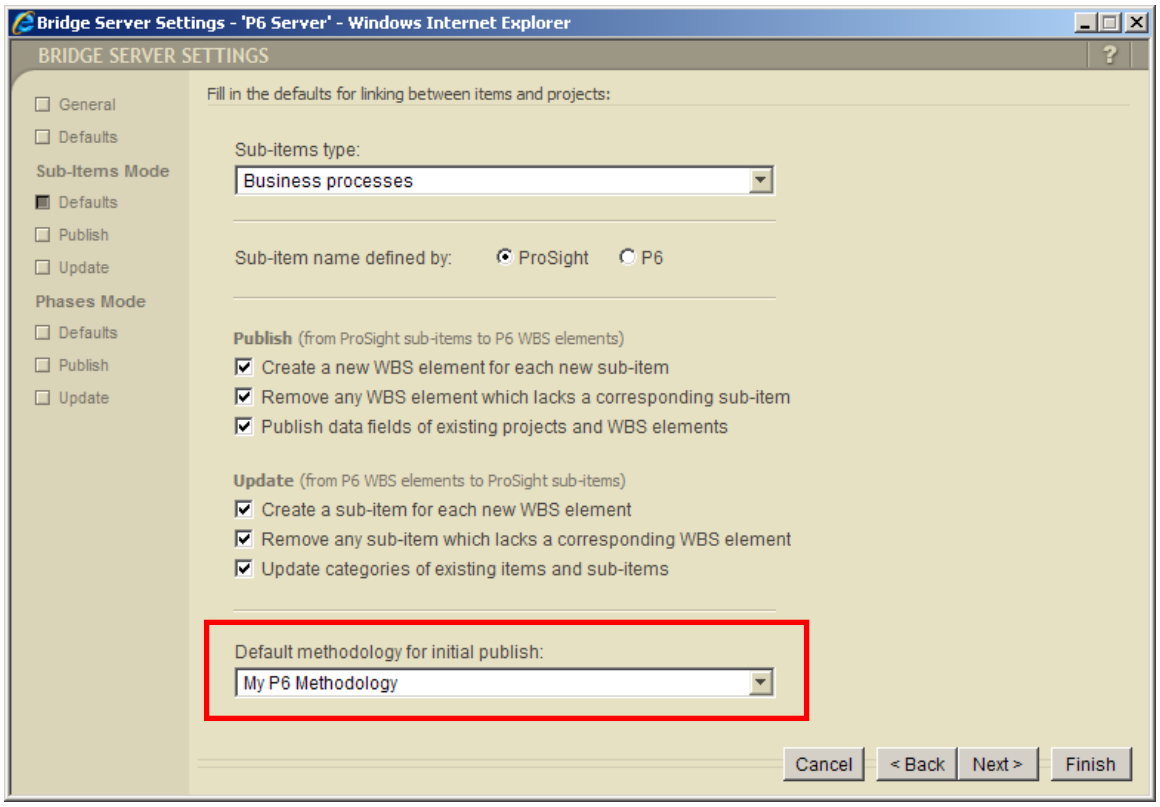
[3] This can be done either by defining the WBS elements in the methodology according to the sub-item names or phase names in Primavera Portfolio Management, or by naming new Primavera Portfolio Management sub-items or phases according to the WBS elements in the P6 methodology.

1. **Manually,** by the end-user – In this case, the administrator provides the user with a Form or a Scorecard in Primavera Portfolio Management containing a field that allows the user to select the name of the P6 methodology that user wants to use, as shown below:



2. **Automatically,** by the system – When no P6 Methodology has been manually selected[4], the system will automatically select a default methodology. This selection is dependent on the mapping mode in use, as follows:

   - **Sub-Items Mapping Mode –** For this mode, the default methodology is the one defined for the server, on the Sub-Items Mode Defaults step in the Bridge Server Settings wizard, as shown below:



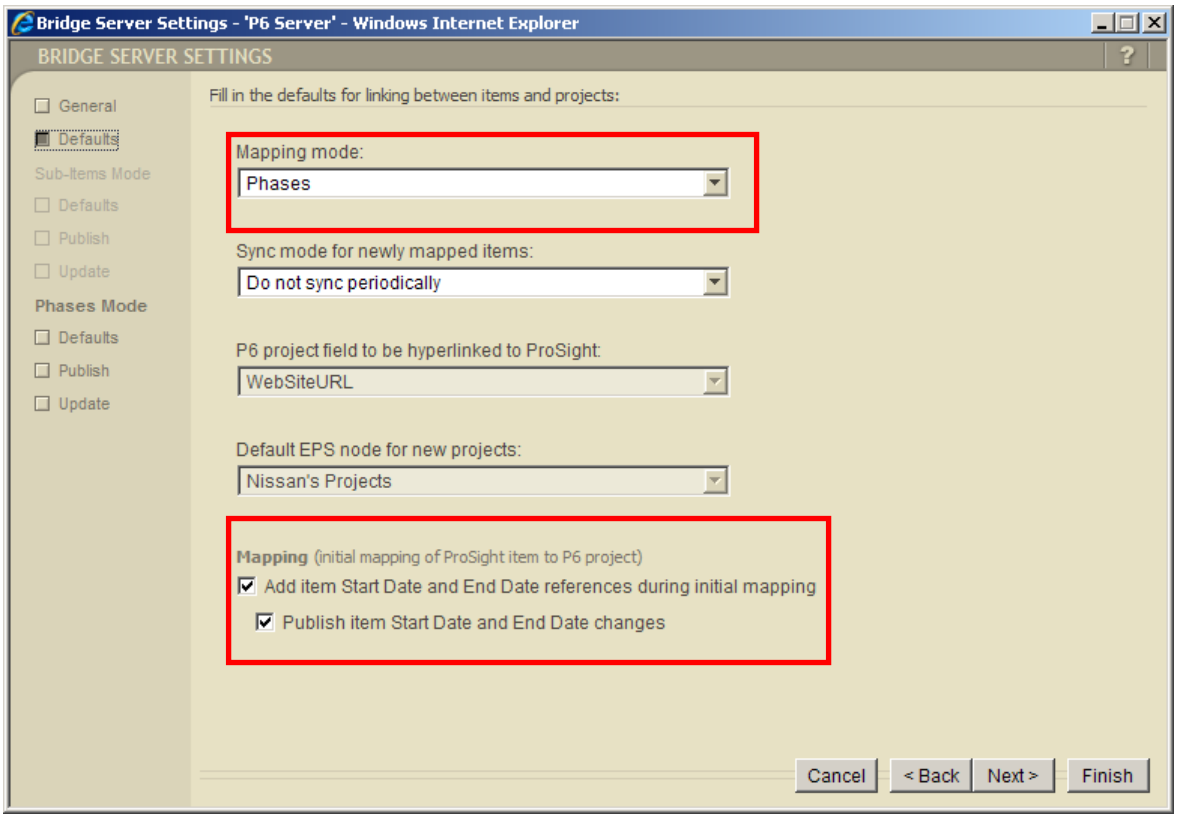
[4] If a user has manually selected a methodology, this selection will override the system's automatic selection.

- **Phases Mapping Mode –** In this mode, the system will select the P6 methodology whose name is identical to that of the life cycle of the published Primavera Portfolio Management item. (This requires the administrator to pre-set the life cycle names in Primavera Portfolio Management to match the names of the P6 methodologies.).

If no methodology was selected either manually or automatically, the WBS structure of the published item will be either empty if in the Sub-Items mode or will reflect the item's phases if in the Phases mode.

Default Bridge Settings when Publishing Primavera Portfolio Management Items

The *Defaults* step of the Bridge Server Settings wizard supports setting the Mapping Mode of the bridge and the addition of item reference information to the newly created project plan[5].



Setting the Mapping Mode of an Item

An item is published according to one of two mapping modes; Sub-Items or Phases.

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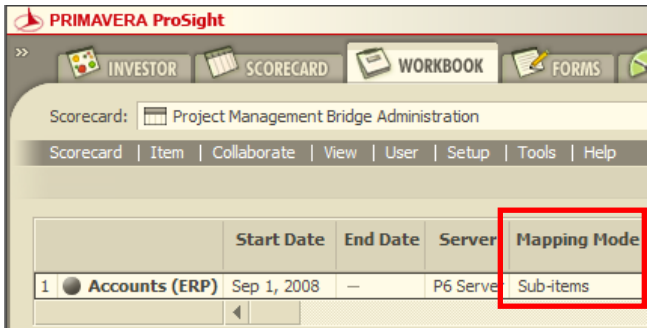
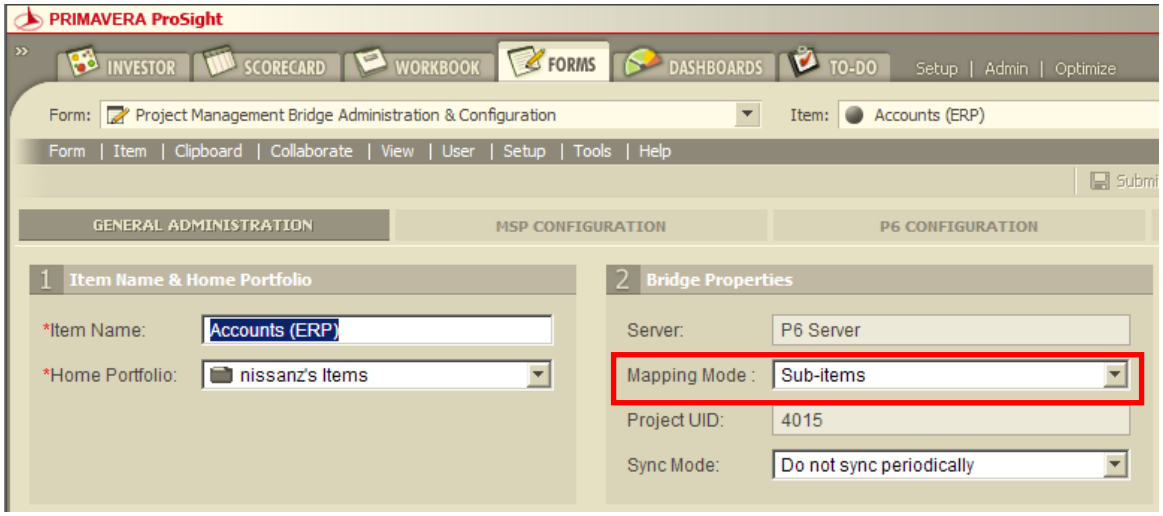
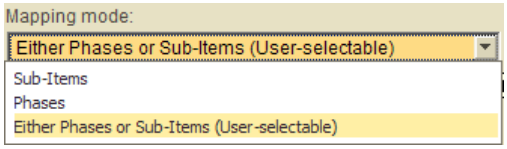
[5] This step also includes the *P6 project field to be hyperlinked to Primavera Portfolio Management* field which will contain the URL to the Primavera Portfolio Management item which is linked to the P6 project, and the *Default EPS node for new projects* field for determining the EPS location of new projects.

1. This mapping mode can be set per item via the *Mapping Mode* category located in the *Project Management Bridge Administration* scorecard/workbook, or on the *Sub-Items Configuration* tab of the *Project Management Bridge Administration & Configuration* form.

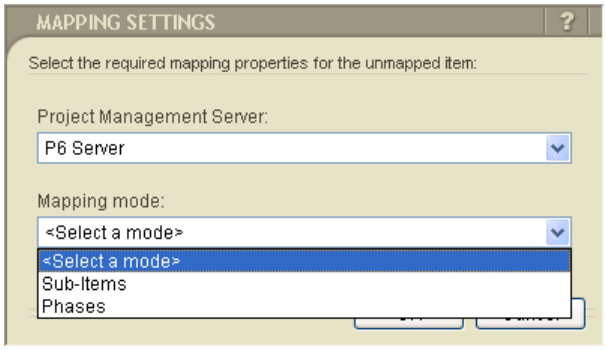




2. If this category has not been assigned a value, then the corresponding *Mapping Mode* server default found on the *Defaults* step of the *Bridge Server Settings* wizard will determine the mapping mode for each item published to that server.

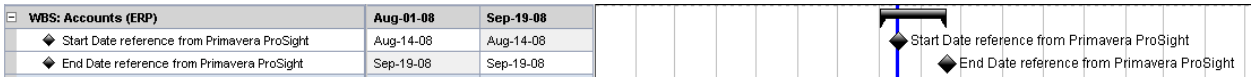


3. If the *Mapping Mode* server default has been set to 'Either Phases or Item (User Selectable)'and the *Mapping Mode* category has been left blank, then when publishing the item for the first time, the user will be prompted to select a Mapping Mode.



Item Start Date and End Date References

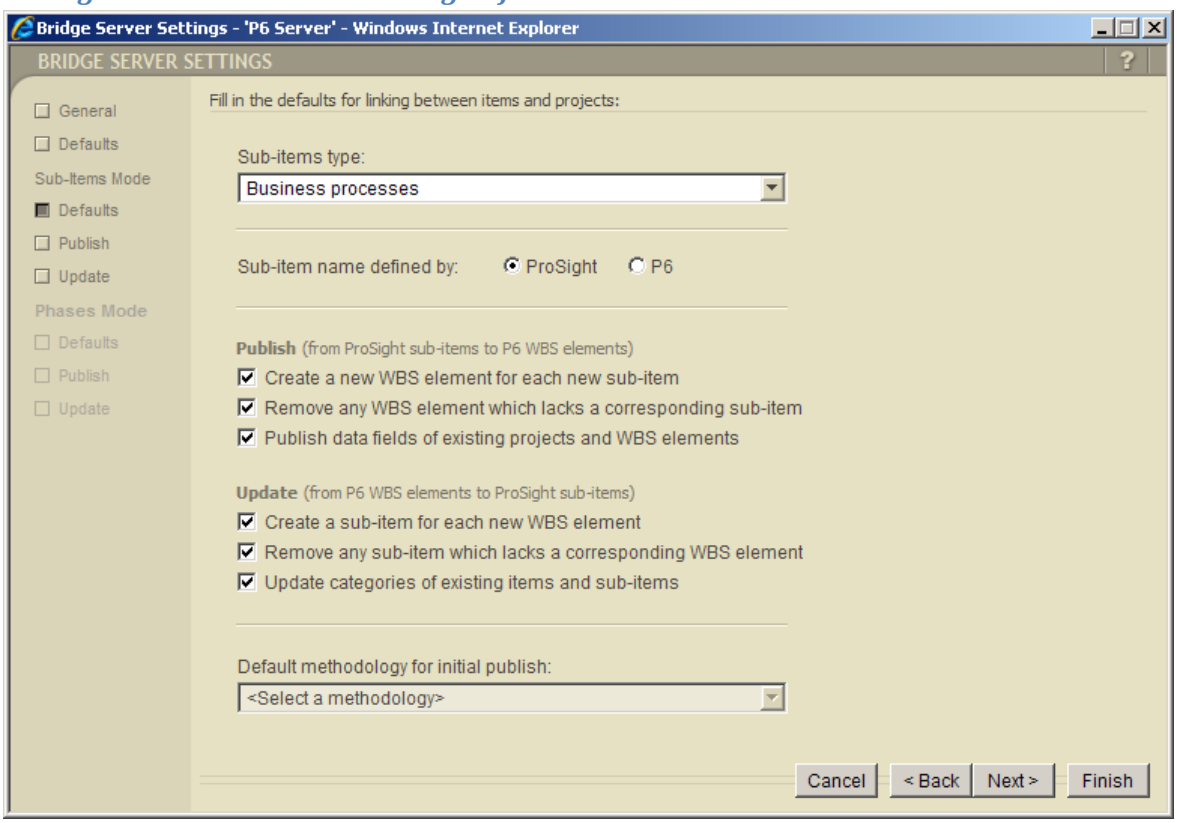
The bridge can be configured to include the Primavera Portfolio Management item Start and End dates. Under the Project level WBS element, two milestone activities will be created: 'Start Date reference from Primavera Portfolio Management' and 'End Date reference from Primavera Portfolio Management'. These will reflect the start and end dates of the mapped item and will show up on the Gantt chart. They can also be configured to be updated in future publish operations.

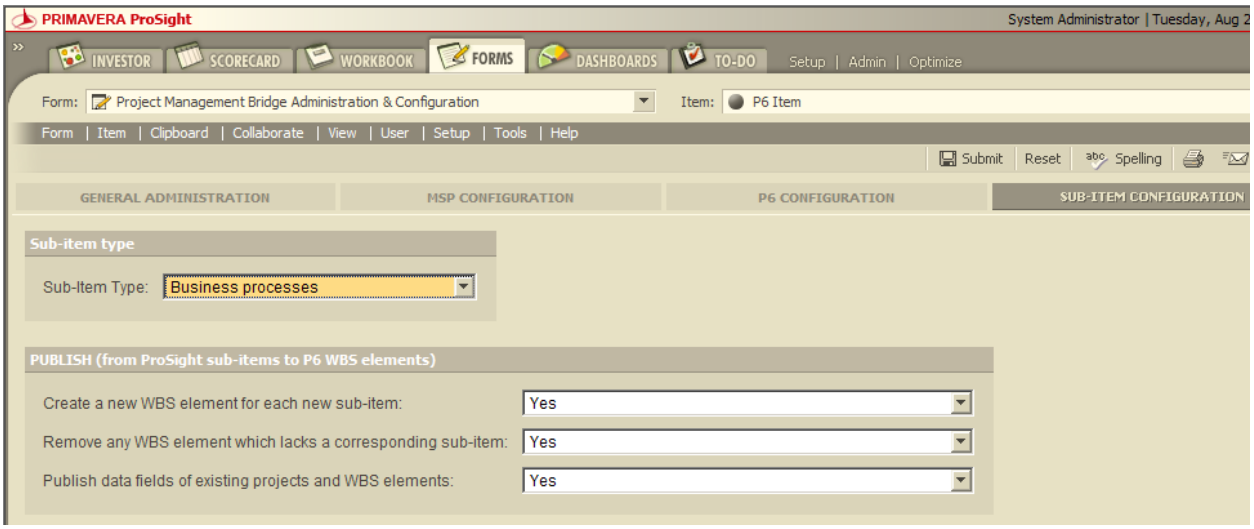


The bridge can be configured to include these Start and End date references regardless of whether the Sub-items or Phases mapping mode is being used to publish the item.

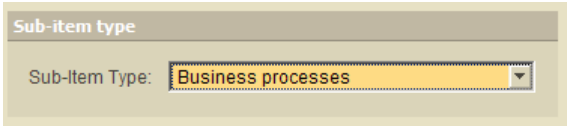
In addition to the item start and end date references, each of the two mapping modes has its own unique Publishing defaults.

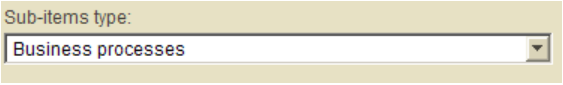
Setting Sub-Items Mode Publishing Defaults





Sub-Item Type



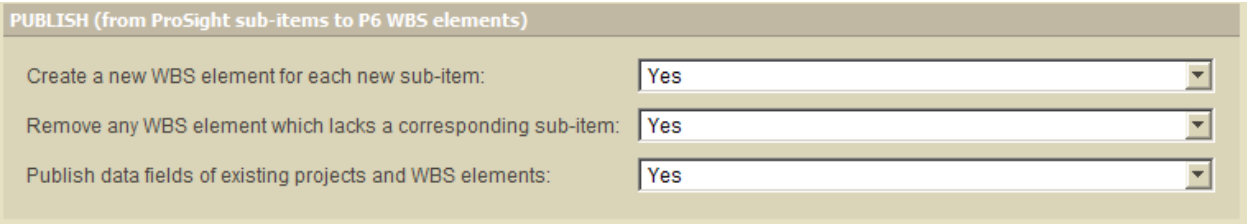


Any publishing (or updating) of items in the Sub-Items Mode will affect only those sub-items of the type defined in the *Sub-Item Type* category found on the *Sub-Items Configuration* tab of the *Project*

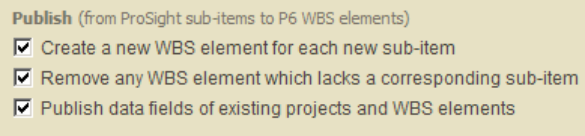
Management Bridge Administration & Configuration form. If this category has not been assigned a value, then the corresponding *Sub-items type* server default found on the *Sub-Items Mode Defaults* step of the *Bridge Server Settings* wizard will determine which sub-item type will be published.

Publishing Parameters

When a Primavera Portfolio Management item is published as a P6 project in the Sub-Items mapping mode, the resulting WBS structure and subsequent data modification of the WBS elements can be controlled by the 3 *Publish* categories found on the *Sub-Items Configuration* tab of the *Project Management Bridge Administration & Configuration* form.



If these categories have not been assigned values, the 3 corresponding Publish server defaults found on the *Sub-Items Mode Defaults* step of the *Bridge Server Settings* wizard will control the WBS structure and data modification.



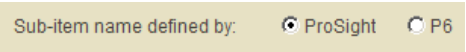
These 3 independent, binary categories (or server defaults), control the following publishing behaviors:

1. *Create a new WBS element for each new sub-item* – If Yes (or checked), for each new sub-item in Primavera Portfolio Management a new WBS element matching this sub-item will be created in P6. Any data contained in this sub-item will also be published to the corresponding fields in the matching WBS element.

2. *Remove any WBS element which lacks a corresponding sub-item* – If Yes (or checked), WBS elements who no longer have matching Primavera Portfolio Management sub-items will be deleted together with all of their data.

3. *Publish data fields of existing projects and WBS elements* – If Yes (or checked), any existing data for Projects or WBS elements already mapped to Primavera Portfolio Management items and/or their sub-items will be overridden by the current item and/or sub-item data.

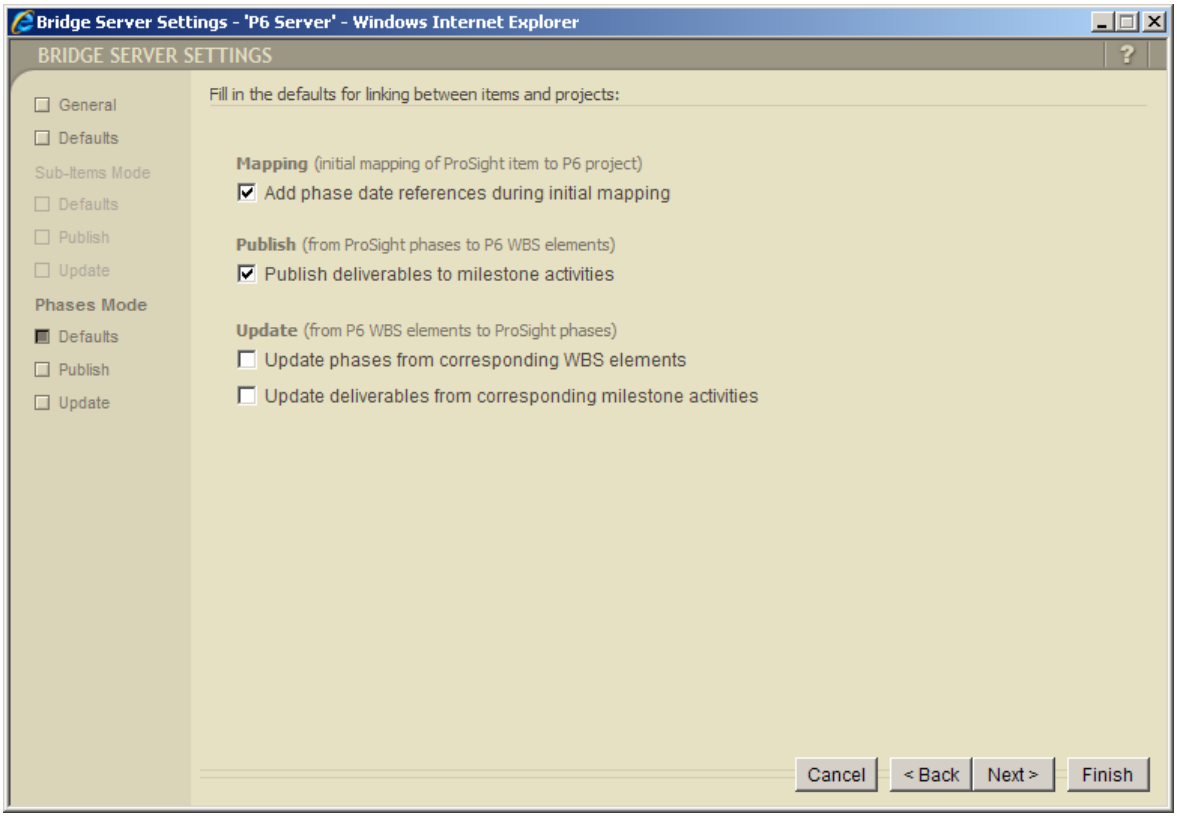
Master of the Sub-Item Name



When a WBS element becomes mapped to a sub-item, each receives the same internal ID. This makes this mapping permanent such that the subsequent renaming of the sub-item in Primavera Portfolio Management or its corresponding WBS element in P6 will not break this mapping.

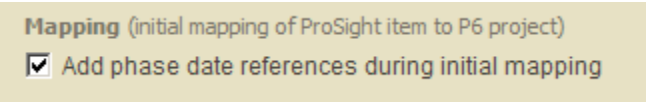
The *Sub-item name defined by* default found on the *Sub-Items Mode Defaults* step of the *Bridge Server Settings* wizard defines, per server, whether the names of the sub-items and their corresponding WBSs are controlled by Primavera Portfolio Management or by P6. When Primavera Portfolio Management controls the naming, if a sub-item already mapped to a WBS element is renamed, the name of the corresponding WBS element will also change accordingly when this sub-item is re-published. This feature preserves the identity of the names of the sub-items and their corresponding WBSs even when changed in one of the applications.

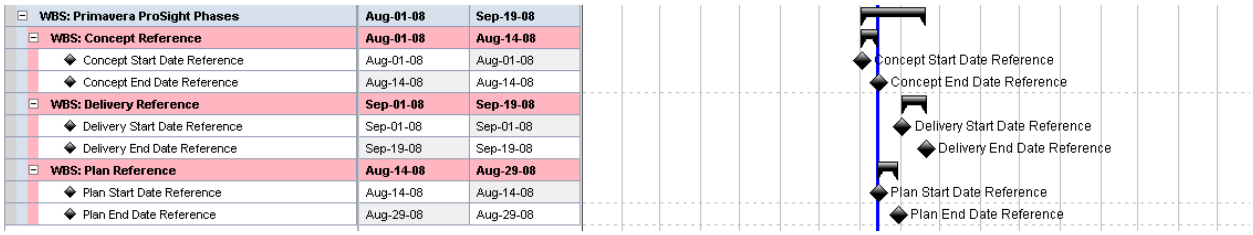
Setting Phases Mode Publishing Defaults



Phase Start Date and End Date References

The bridge can be configured so that the original Primavera Portfolio Management phase schedule dates can be published.

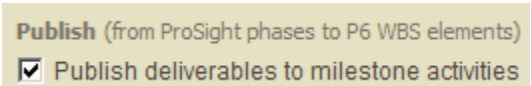


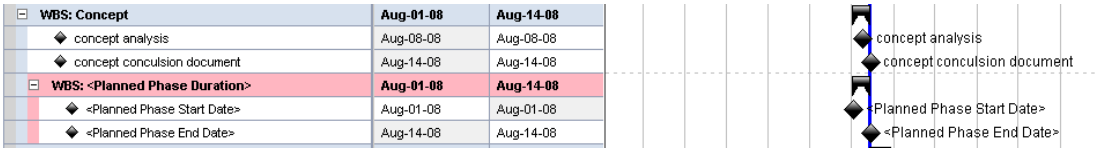


- Under the Project level WBS element, a Phases reference WBS element named 'Primavera Portfolio Management Phases' is created. Under this WBS element, additional WBS elements named after the respective phases of the item with the addition of the word 'Reference', are created. These reference WBS elements will not be updated in future publish operations.
- Each of these WBS elements corresponding to Phases includes two milestone activities: 'Plan Start Date Reference' and Plan End Date Reference' which represent the initial start and end dates of the published phase.

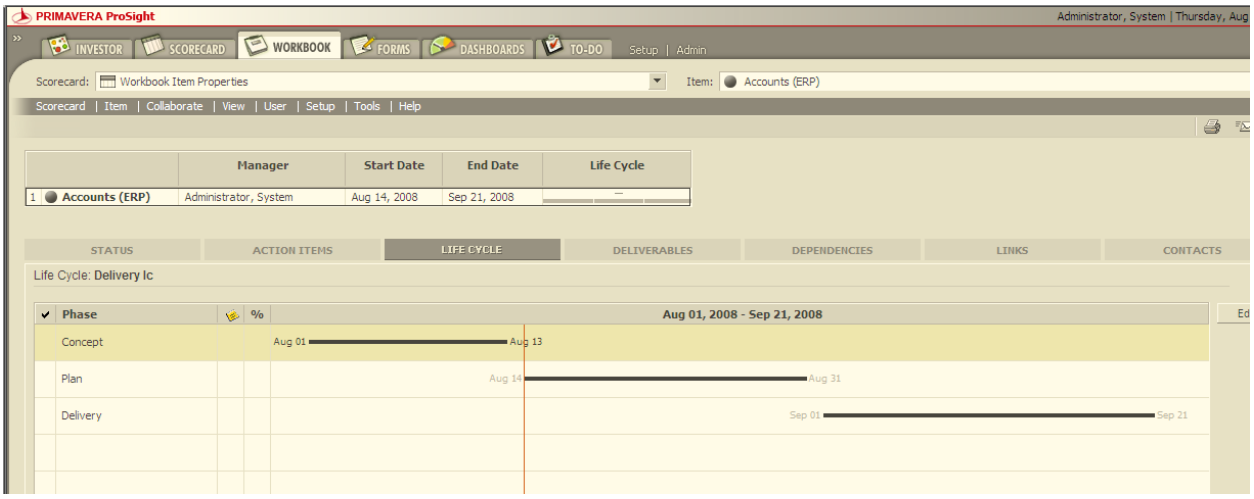
Deliverables

Another setting supports the publishing of Primavera Portfolio Management deliverables. For each deliverable in the item's phases, a finish milestone activity is created and assigned to the WBS element representing that phase.

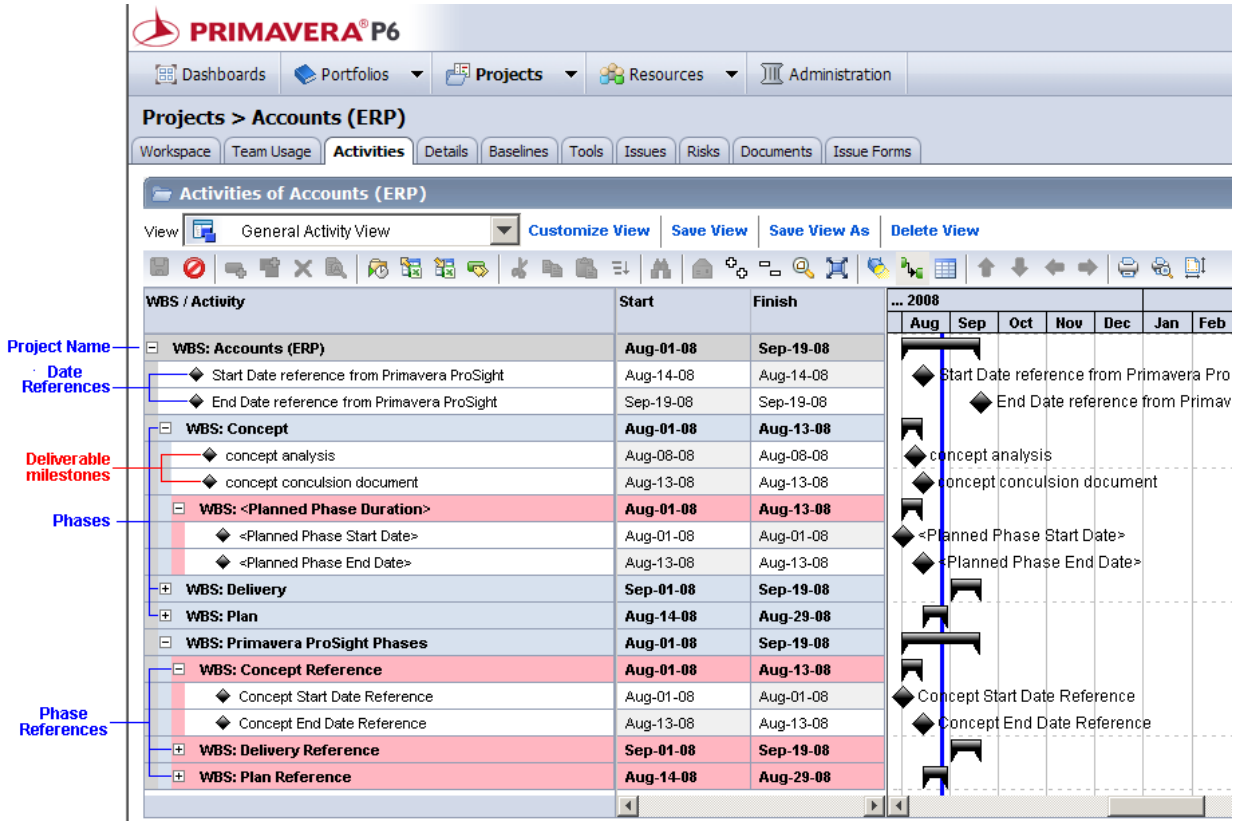




The aforementioned item and life cycle information which appear in Primavera Portfolio Management as shown below,



will appear in Primavera P6, as shown below:



- Project Name - The new project 'Accounts (ERP)' has the same name as the published item.
- Deliverable Milestones - A finish milestone activity is created on the Gantt chart for each deliverable published from Primavera Portfolio Management, such as the milestone displayed for 'concept analysis'.

- Date References – These milestones refer to the initial Start and End dates of the item.
- Phases – These WBS elements ('WBS: Concept', 'WBS: Delivery' and 'WBS: Plan') have the same names as the Primavera Portfolio Management item's life cycle phases ('Concept', 'Delivery' and 'Plan'). WBS elements with the same name as phases of the item in Primavera Portfolio Management are automatically mapped to these phases. These WBS elements mark the Forecast Start and End dates of each phase, as recorded in Primavera Portfolio Management.
- Phase References – This refers to the 'WBS: Primavera Portfolio Management Phases' element. This is used to reference the original schedule for the Phases, as published during the initial publishing of the item. This WBS element contains additional WBS elements per phase. Each of these latter WBS elements contains Phase Start and End Date reference milestones, which mark the original planned dates of the phases, as recorded in Primavera Portfolio Management. They do not change during subsequent publishing.

Publishing Portfolios

When publishing a portfolio of items, no project is created or updated on the basis of this portfolio. Projects are created and updated only on the basis of published items. Nevertheless, the publishing of a portfolio of items[6] can serve as a short-hand method for publishing many items simultaneously. There are several scenarios:

1. If none of the items has been previously published, the user can specify a single Project Management system server as the destination for the items
2. If all items have been previously published, all projects will be updated with any new information
3. If only some items have been previously published, the user can specify a single Project Management system server as the destination for the items that were not yet published. All previously published items will be updated with any new information.

   Note: If a portfolio contains items that were not yet published which should be mapped to different servers, the user should publish them individually, and not publish the entire portfolio. As an efficiency measure, the administrator should create query-based portfolios to collect items with different destinations and then publish each portfolio to a different Project Management system server.

The following sections describe how to publish Primavera Portfolio Management information to Primavera P6.

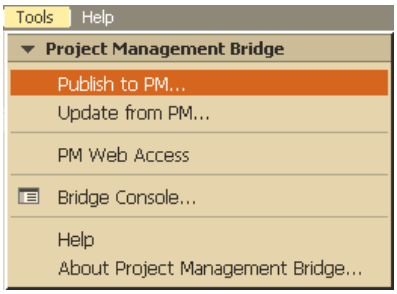
Publishing a New Item in Primavera Portfolio Management

To publish a new item:

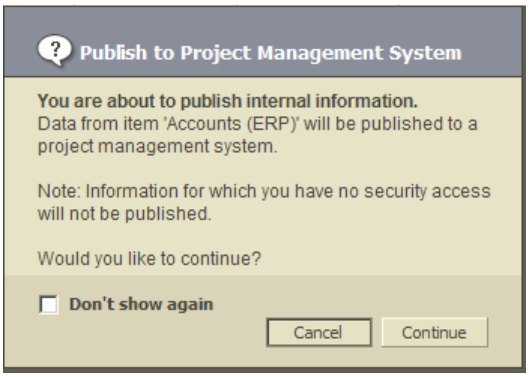
1. Open an item while in a Workbook or a Form, or open a portfolio of items while in **Scorecard** or **Investor.**

[6] Portfolios of portfolios cannot be published.

2 From the **Tools** menu, select **Publish to PM**.

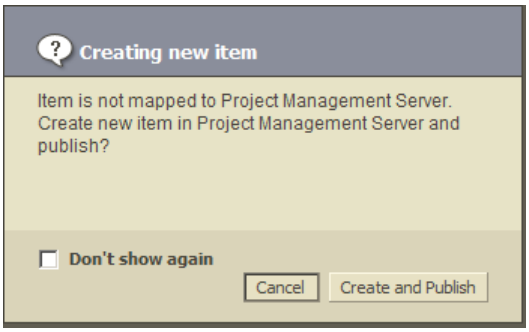


A confirmation dialog box appears.



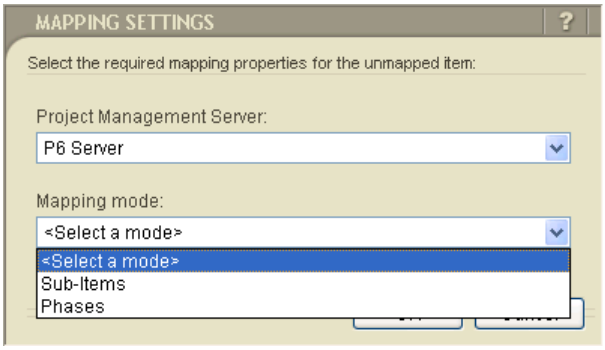
3 Confirm that you want to publish the specified item or portfolio by clicking Continue.

The following dialog box appears:



Note: The Publish process has no "undo" feature. Once published, only a Project Management system administrator can remove a project by deleting it from the server.

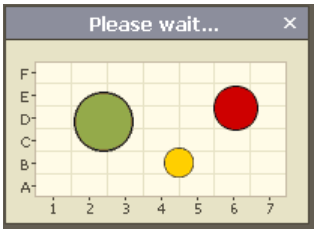
Note: At this point, the system may ask the user to input additional information necessary for the publishing of this item, as shown below:



1. *Project Management Server* - When multiple Project Management system servers are mapped to Primavera Portfolio Management, the user must define the server to which the item should be initially published.
2. *Mapping mode* - In addition, if the default Mapping Mode in which this item is supposed to be published has not been set (see *Setting the Mapping Mode of an Item*), the user must select the mode.

The destination server and mapping mode are remembered for any subsequent publishing of these items.

4 Click **Create and Publish**. A progress indicator appears.



If the publishing process is completed successfully, the following dialog box appears.

Click **OK.**

5 If the publishing process experiences any errors, an error message appears. Follow the message's instructions, or see your system administrator.

Note: Subsequent publishing of item information can be done periodically through a system-wide synchronization process, referred to in PM Bridge as Sync. See your user guide for more information.

Note: An item that has the same name as an existing P6 Project must be mapped before publishing. See Chapter 4 of the Project Management Bridge help, *Importing Projects*, the section dealing with *Importing by Mapping to Existing Items*.

Viewing a Published Item in Primavera P6

There are three ways of viewing projects in P6:

- Connecting to P6 Web Access with a web browser (referred to as 'My Primavera').
- Opening the project in a P6 desktop client.
- Accessing information through web portlets in Forms.

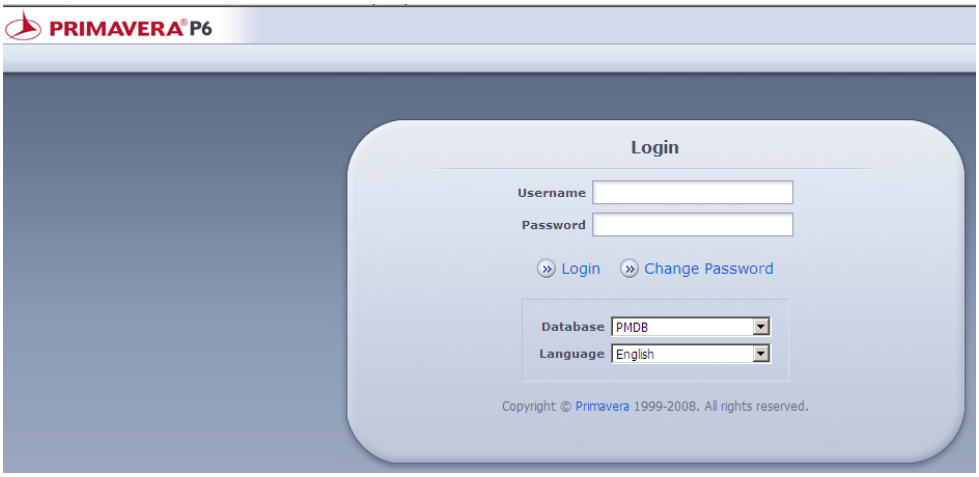
> **Note**: Web portlets are a feature your system administrator can build into a Primavera Portfolio Management Form, giving you a view of your project plan on Primavera P6. For more information, see Chapter 7 in the Project Management Bridge help, *Viewing Information from the Project Management System.*

Viewing Published Information in P6 Web Access ('My Primavera')

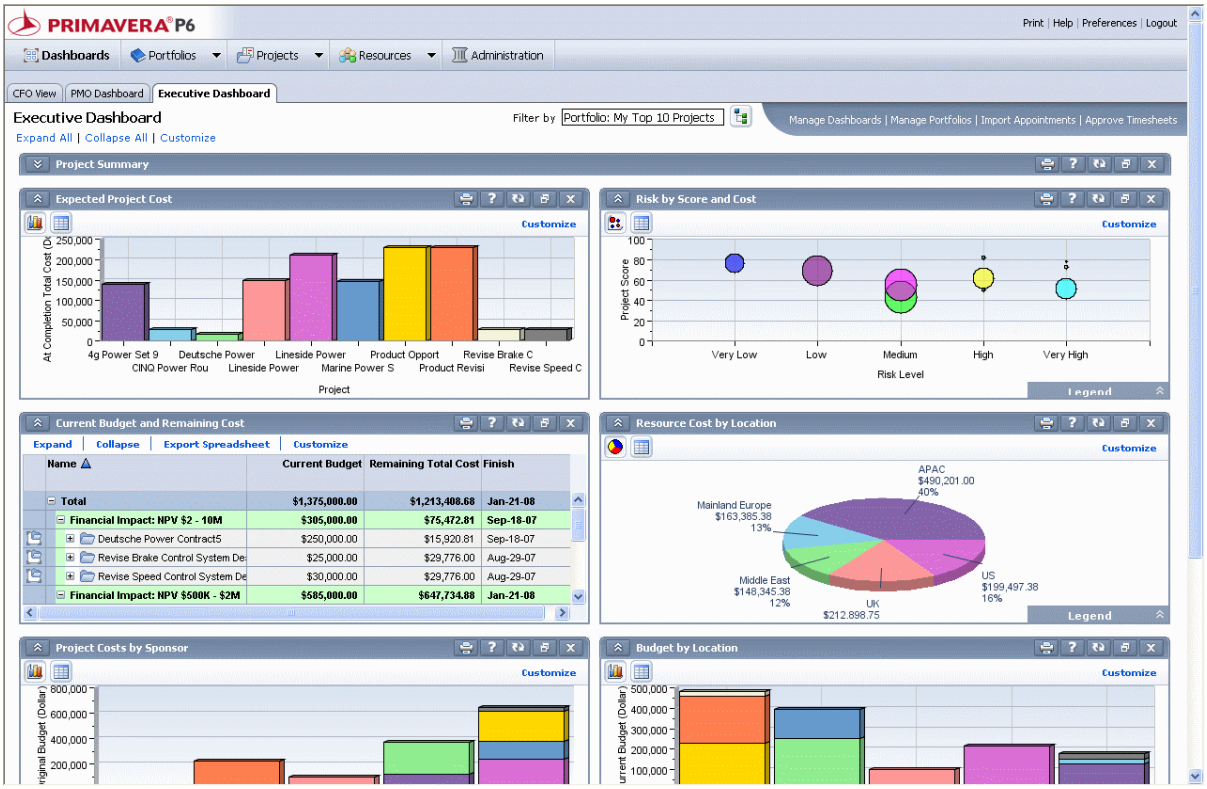
P6 Web Access allows you to open the web page link of the project which is linked to the item you are looking at in Primavera Portfolio Management, on P6.

To view the project in 'My Primavera':

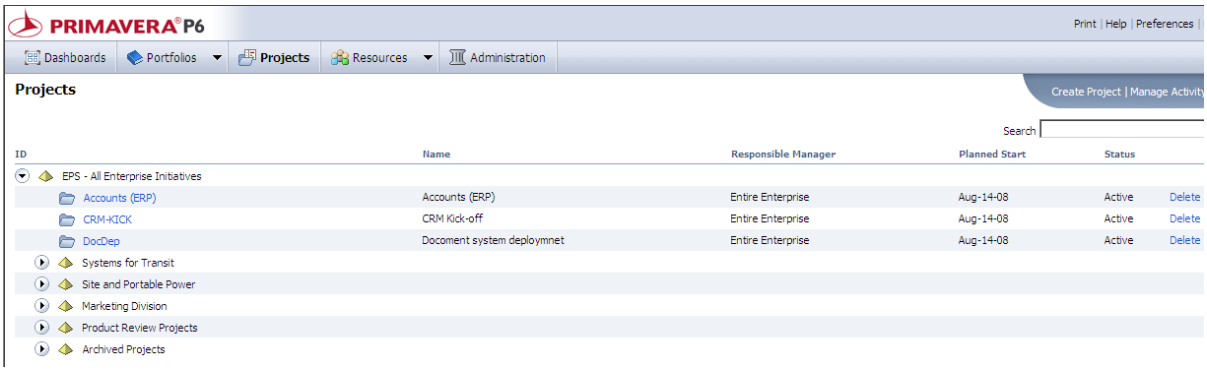
1. Open a browser window and connect to your company's P6 Web Access. If you do not work with Windows Authentication, the Login window appears.



2 Log in using the username and password that was provided by your administrator and click **Go**. The *Home* window appears.

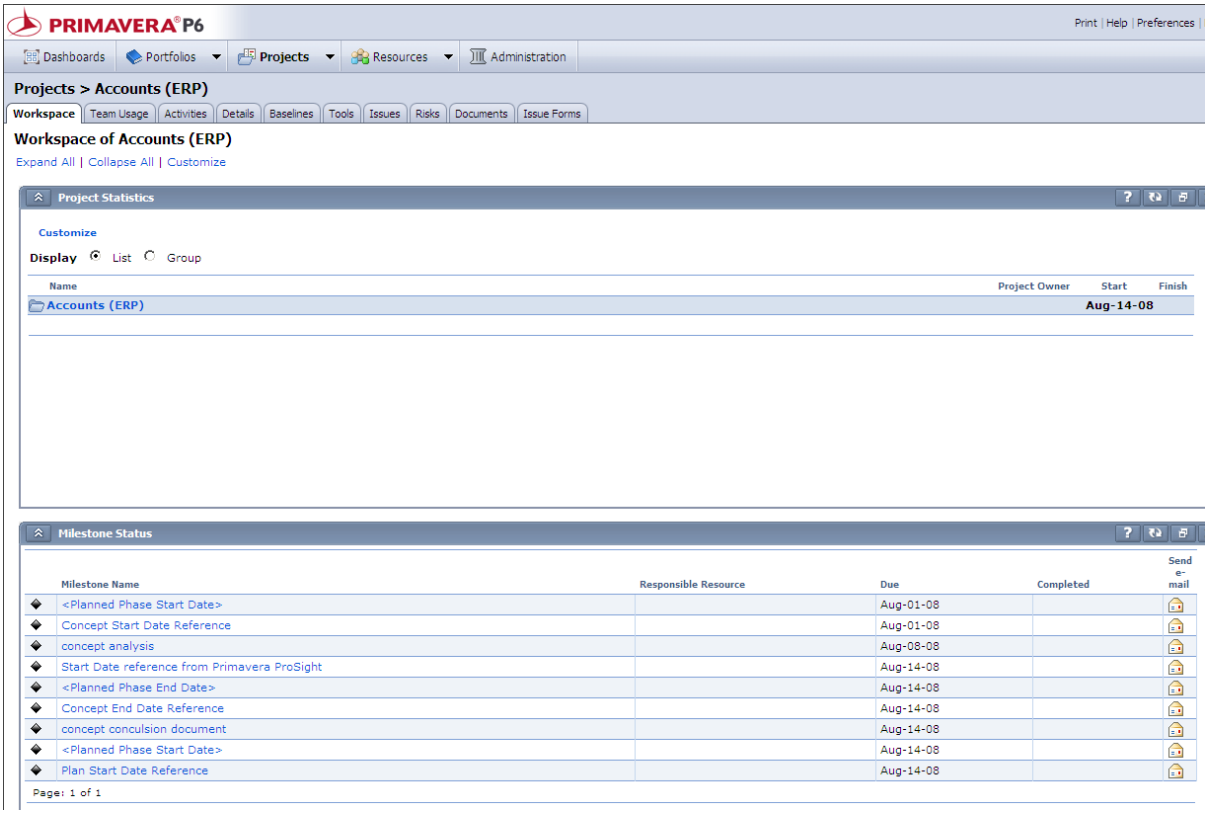


3 Click **Projects** from the menu bar to verify that the project has been published. The *Projects* window appears.



4 Scroll down the list of projects until you find the project that you published.

5 Click on the project name. The project opens.

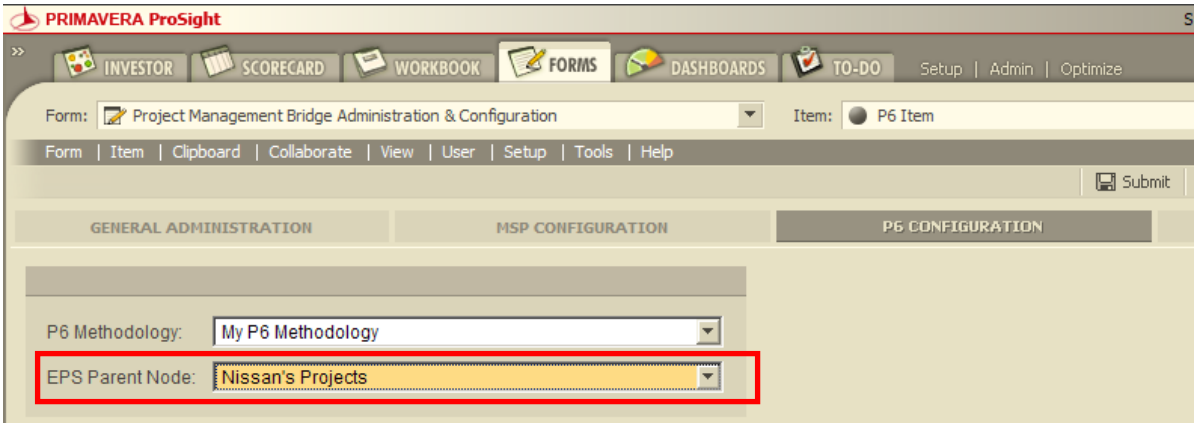


Note: The actual display can vary according to the default view.

Location of the published item

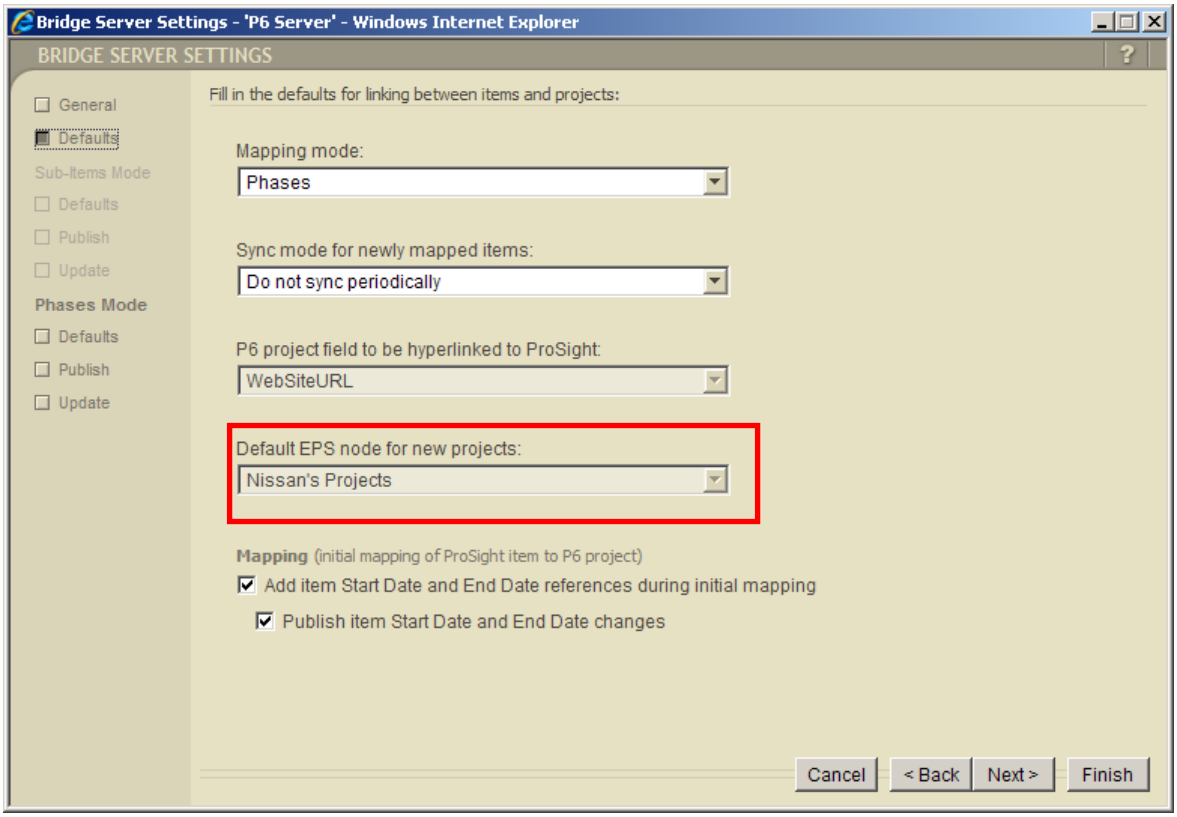
When an item is published for the 1st time, its EPS location will be determined according to the following:

- The EPS location selected in the *EPS Parent Node* category for the item about to be published. This is a value list category on the *P6 Configuration* tab of the Project Management Bridge Administration & Configuration form which contains all possible EPS Nodes.



- If this category is not populated or such EPS Node does not exist, then the EPS location will be an EPS Node with the same name as the item's home portfolio.

- If there is no EPS Node with the same name as the item's home portfolio, the item will be placed in the server's default EPS which is selected on the *Defaults* step of the Bridge Server Settings wizard,



Updating Data from Primavera P6

The Update feature transfers information from P6 to Primavera Portfolio Management. This enables the portfolio manager to monitor the progress of projects in Primavera P6 from within Primavera Portfolio Management. The update functions differently for each of the two mapping modes.

Setting Sub-Items Mode Updating Defaults

When updating from P6, information can be transferred to Primavera Portfolio Management from the following types of fields:

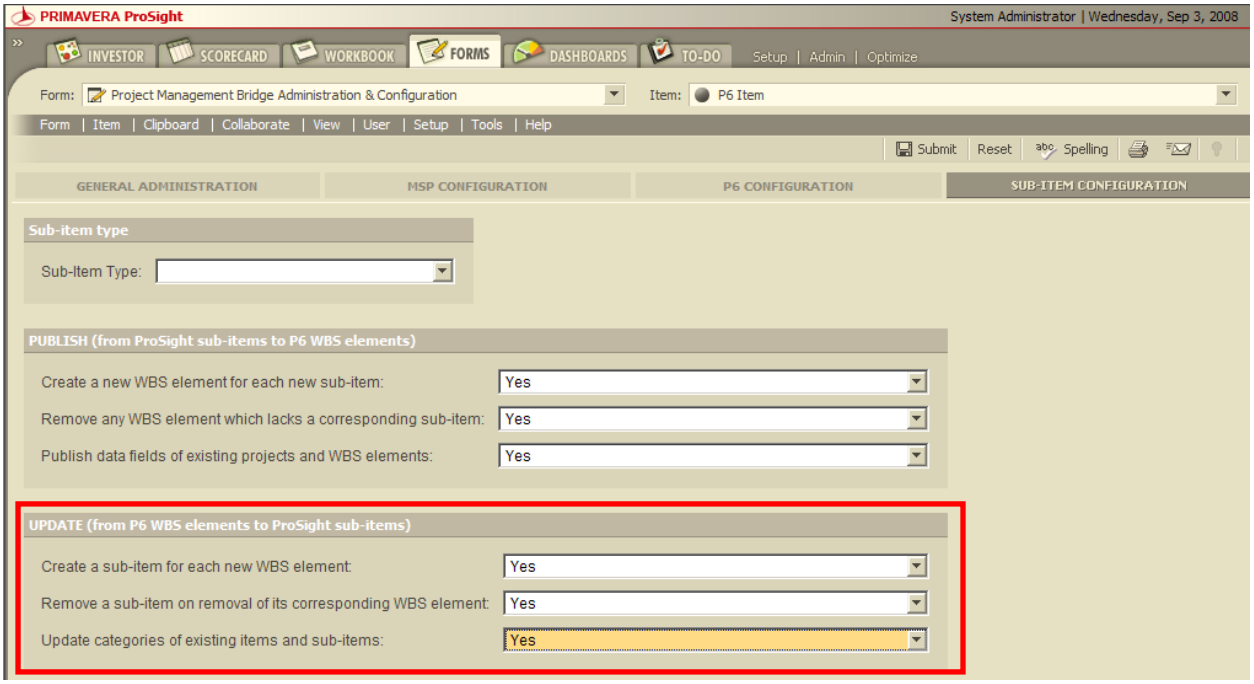
- Project fields
- Project codes
- Project spreadsheets
- WBS fields

In each update operation, Primavera Portfolio Management category values of mapped items and sub-items are updated with P6 field and code values and WBS values from the mapped project and WBS elements beneath.

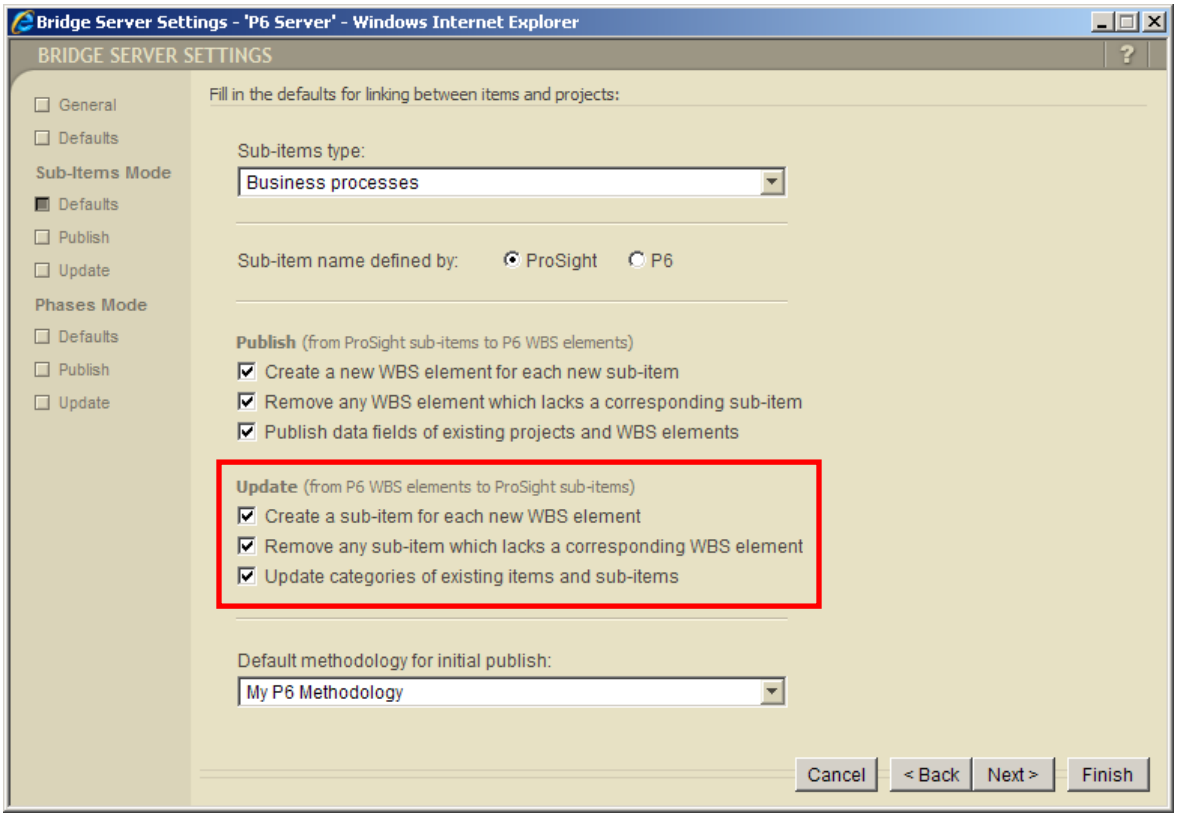
Note: If no Primavera Portfolio Management categories are mapped to P6 fields, no sub-item data is updated in Primavera Portfolio Management, not even their Start and End dates.

Updating Parameters

When updating items and sub-items that have been published in the Sub-items mapping mode, the actual content of the sub-items list and their data modification can be controlled by the 3 *Update* categories found on the *Sub-Items Configuration* tab of the *Project Management Bridge Administration & Configuration* form.



If these categories have not been assigned values, the 3 corresponding Update server defaults found on the *Sub-Items Mode Defaults* step of the *Bridge Server Settings* wizard will control the WBS structure and data modification.



These 3 independent, binary categories (or server defaults) control the following updating operations:

1. *Create a sub-item for each new WBS element* - If Yes (or checked), for each new WBS element in P6, a new sub-item matching this WBS will be created in Primavera Portfolio Management. Any data contained in this WBS element will also be updated to the corresponding fields in the matching sub-item.

2. *Remove a sub-item on removal of its corresponding WBS element* - If Yes (or checked), sub-items who no longer have matching WBS elements will be deleted, together with all of their data.

3. *Update categories of existing items and sub-items* - If Yes (or checked), any existing data for Primavera Portfolio Management items and/or their sub-items already mapped to Projects or WBS elements will be overridden by the current Project and/or WBS element data.

Master of the Sub-Item Name

When a WBS element becomes mapped to a sub-item, each receives the same internal ID. This makes this mapping permanent such that the subsequent renaming of the sub-item in Primavera Portfolio Management or its corresponding WBS element in P6 will not break this mapping.

The *Sub-item name defined by* default found on the *Sub-Items Mode Defaults* step of the *Bridge Server Settings* wizard defines, per server, whether the names of the sub-items and their corresponding WBSs

name are controlled by Primavera Portfolio Management or by P6. When P6 controls the naming, if a WBS element already mapped to a sub-item is renamed, the sub-item's name will change to that of the corresponding WBS element when this sub-item is updated. This feature preserves the identity of the names of the sub-items and their corresponding WBS elements even when changed in one of the applications.

Setting Phases Mode Updating Defaults

When updating in the 'Phases' mapping mode, new item, phase and deliverable schedule information may be updated in Primavera Portfolio Management from P6 project and WBS fields.

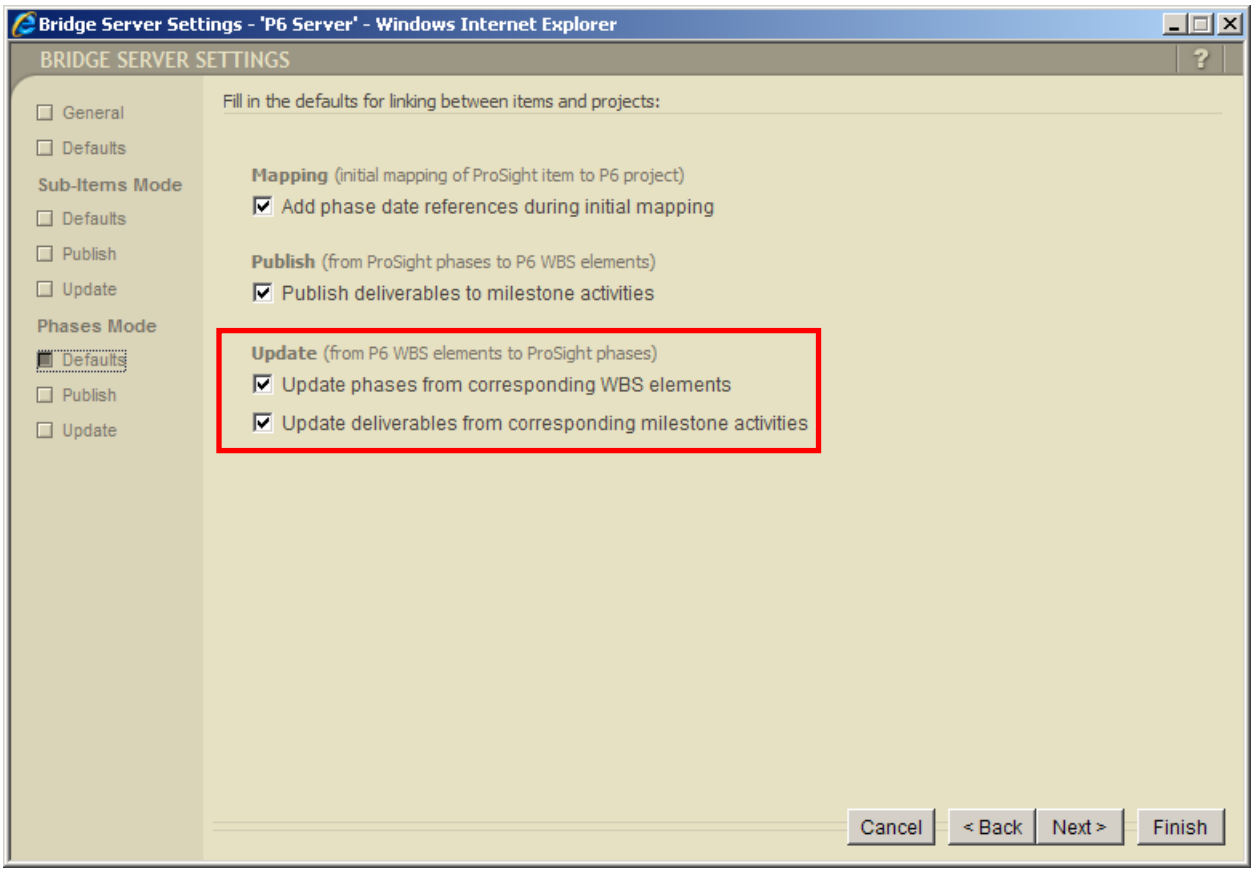
When you run an update, scheduling information such as item Start and End dates, Phase Start and End dates and % Completion, and Deliverable Due dates and Completed status may receive updated information, depending upon how your system is configured. (In addition Primavera Portfolio Management categories that have been mapped to be updated from P6 project fields or codes or WBS fields will also be updated - see *Mapping Primavera Portfolio Management Categories and P6 Fields and Codes*.)

You can access the Update command from the Investor, Scorecard, Workbook, Forms and Dashboard modules. You can update a single project, or an entire portfolio of projects. Since the update feature works in tandem with the publish process, you can update only from a project in Primavera P6 that has previously been mapped to a Primavera Portfolio Management item.

Note: The categories to be updated are selected in advance by your system administrator. For information about which categories are updated, speak to your system administrator.

Updating Phase and Deliverable Information

When updating from Primavera P6, defaults may be set so that new phase information and deliverable schedule information may be updated in Primavera Portfolio Management.



Phase Information

Date-associated activity information is updated from 2nd level WBS elements that are mapped to Primavera Portfolio Management Start and End dates. The update process searches for item phases that match the project's 2nd level WBS names. If your administrator has elected to update phase information to Primavera Portfolio Management, the update process copies new WBS information to Primavera Portfolio Management when it finds an exact phase name match. The following table shows the phase fields that are updated.

Primavera P6 WBS Field	Primavera Portfolio Management Phase Field
BL1 Start date	Planned Start date
BL1 Finish date	Planned End date
Start date	Forecast Start date
Finish date	Forecast End date
Actual Start date	Actual Start date
Actual Finish date	Actual End date
Performance % Complete	% Complete

Deliverables Information

When Primavera Portfolio Management Deliverables are mapped to Primavera P6[7], the bridge can be set such that changes in the *Start* and *Finish* dates or Activity *% Complete* of the corresponding milestone activity in P6 will be reflected respectively in the deliverable *Due Date* and *Completed*[8] fields in Primavera Portfolio Management during the next manual Update or Sync operation. The following table shows the deliverable fields that are updated.

Primavera P6 Milestone Field	Primavera Portfolio Management Deliverable Field
Start & Finish dates	Due Date
Activity % Complete	Completed

The following sections describe how to update Primavera Portfolio Management information from Primavera P6.

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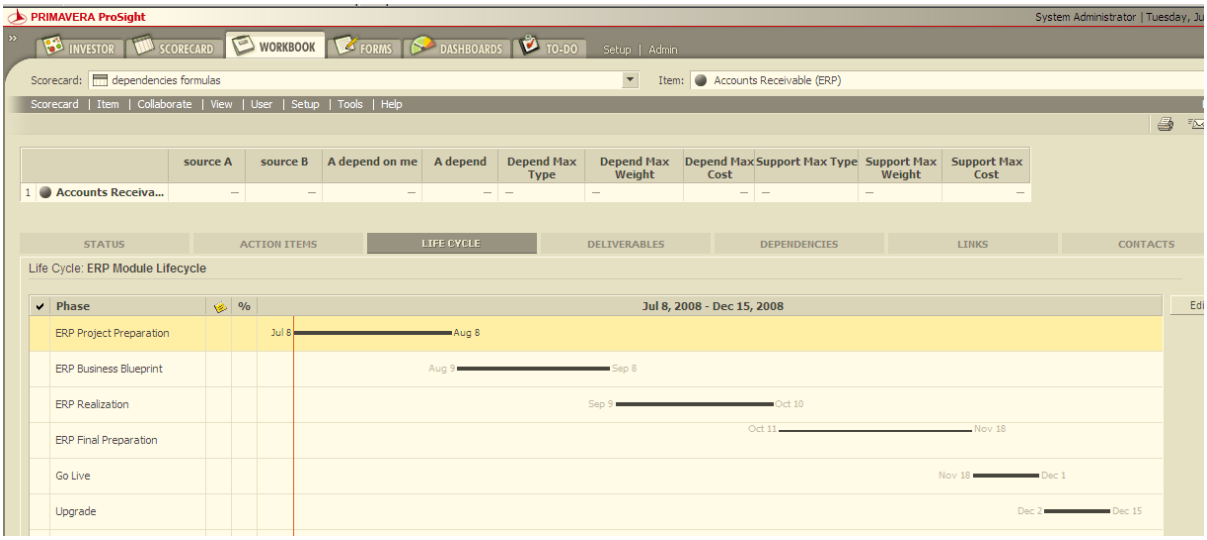
[7] Either because the initial publishing of the item was based on the Primavera Portfolio Management items phase and deliverable content, or if published based on a Primavera P6 methodology, where the methodology contains a WBS element with a milestone activity which are named identically as one of the Primavera Portfolio Management item's phases and its deliverable, respectively.

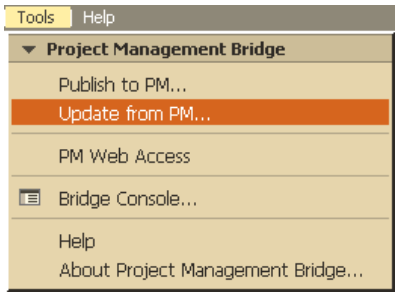
[8] If the Deliverable milestone % Complete in Project is 100% then the Deliverable Completed (√) checkbox in Primavera Portfolio Management is checked. If % Complete is less than 100%, the checkbox is not checked.

To update from Primavera P6:

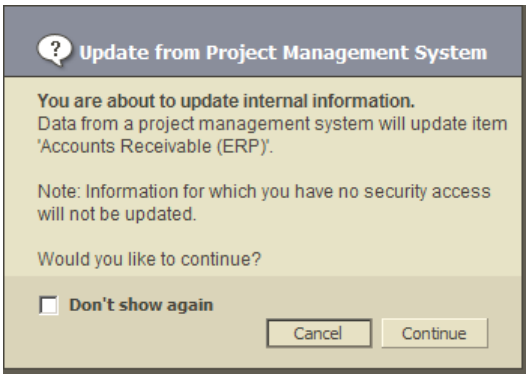
1 Navigate to the item or portfolio of items you want to update. You may wish to note the phase and other updateable information.



2 From the **Tools** menu, select **Update from PM**.



3 A confirmation dialog box appears.



4 Click **Continue**. A progress indicator appears.

5 After the update process is finished, one of two types of messages appear:

- **Update Succeeded!** - All information was updated successfully.
- **Update failed** (or some of the information failed to update) - In this case, follow the instructions in the message.

  Note: You will receive an error message if some of the selected items are not mapped to a project.

6 Click **OK** to close the dialog box. The project is now updated.

Mapping Primavera Portfolio Management Categories and P6 Fields and Codes

The Primavera Portfolio Management Bridge for Primavera P6 can synchronize Primavera Portfolio Management categories with P6 project fields, project codes, WBS fields and spreadsheet data, thereby supporting the transfer of category information between the two systems.[9]

Administrators first need to define which categories participate in publish and which in update. Each of these categories must be mapped to a field or project code in P6.

Categories that are set to publish can be mapped to either P6 project fields or project codes of a matching data type. (In the Sub-Items Mapping Mode, WBS fields are also available.) During the publishing process, the mapped P6 field or code will be updated with new information from Primavera Portfolio Management. If no project is currently mapped to a published item, the system creates a new project in P6.

Categories that are set to update can be mapped to either P6 project fields, project codes or spreadsheet fields of matching data types. (In the Sub-Items Mapping Mode, WBS fields are also available.) During the update, the category will be updated with new information coming from the field to which it is mapped in P6.

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[9] Although in the Phases Mapping Mode, Primavera Portfolio Management phase and deliverable schedule and completion data can be transferred to P6 without mapping Primavera Portfolio Management categories to P6 fields and project codes, in the Sub-Items Mapping Mode, no data will be transferred without mapping categories to P6 fields.

Unidirectional Data Sharing Principle

For each field or category, data is shared in only one direction. A Primavera Portfolio Management category that is used to publish information to P6 cannot be updated with information from P6. A Primavera Portfolio Management category that gets updated by information from P6 cannot be set to publish information to P6. Similarly, P6 fields that update their data to Primavera Portfolio Management categories cannot receive data from Primavera Portfolio Management, and P6 fields that receive data from Primavera Portfolio Management cannot be set to update categories.

Note: Though it is technically possible to enter information manually into a category that gets updated from P6, this information is overwritten the next time P6 updates Primavera Portfolio Management.

Note: If in certain projects you want the information in a specific category to be derived from P6, while in other projects you want information to be entered directly into Primavera Portfolio Management, use a "master category" technique. For example: If you want some projects to display a "planned start" date as it is entered by the project manager in P6, and in other projects you want this date to be entered directly into Primavera Portfolio Management, do the following:

- Create a category called "P6 Planned Start Date" to receive the planned start date from P6.
- Create another category called "Primavera Portfolio Management Planned Start Date" to receive the start date, as entered in Primavera Portfolio Management.
- Create a category called "Master Source" that allows a user to select "P6" or "Primavera Portfolio Management" from a value list.
- Create a category called "Planned Start" with a function that determines whether to get the category value from "P6 Planned Start Date" or "Primavera Portfolio Management Planned Start Date", based on the "Master Source" category.

Types of P6 Fields which can be Mapped to Primavera Portfolio Management Categories

It is important to be familiar with the following P6 field types and understand how they can be mapped to Primavera Portfolio Management categories:

- Project Fields
- Project Codes
- Spreadsheets
- WBS Fields

Project Fields

Project fields contain project data. There are two kinds of Project fields: built-in and user-defined. Most of the built-in fields reflect summarization of data from the Work Breakdown Structure. These fields can only be updated. The built-in fields which are not summarized and all of the user-defined project fields can be mapped for either publishing or updating. Project fields are available for both the Sub-Items and Phases mapping modes.

Project Codes

Project codes are a special type of field used to classify projects into groups. These codes are used in P6 to sort or filter the projects. There are both pre-defined and user defined codes. Both are available for both publishing and updating. Project Codes are available for both the Sub-Items and Phases mapping modes.

Spreadsheets

Spreadsheets enable the P6 user to obtain a breakdown of built-in project fields by resource and time slices (such as Cost 2008 per a selected resource). Spreadsheets are available for updating only. Accordingly, each built-in project field can be mapped to a Primavera Portfolio Management category while specifying a calendar period and a resource filter by which to breakdown the data. Spreadsheets are available for both the Sub-Items and Phases mapping modes.

WBS Fields

WBS fields contain data of WBS elements. There are two kinds of WBS fields: built-in and user-defined. Most of the built-in fields reflect summarization of data from the Work Breakdown Structure and activities underneath. These fields can only be updated. The built-in fields which are not summarized and all of the user-defined WBS fields can be mapped for either publishing or updating. WBS fields are available for the Sub-Items mapping mode only.

The following sections provide instructions on how to map categories and fields.

Mapping the Publish Fields – the Publish Step

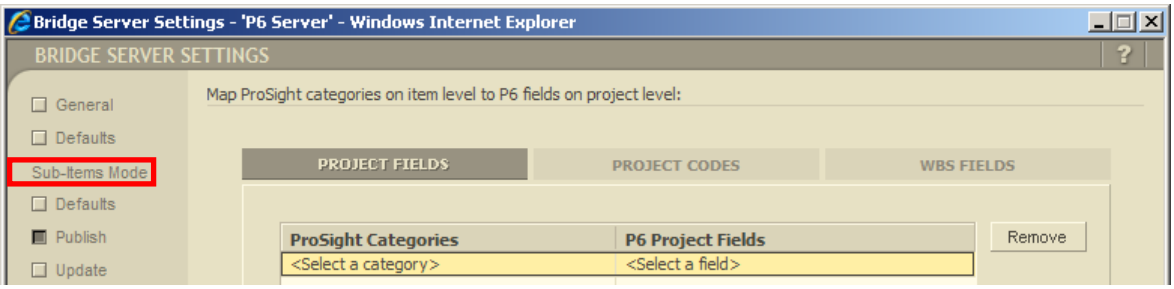
The *Publish* step for either of the mapping modes in the *Bridge Server Settings* wizard, enables the administrator to set system-wide policies for mapping Primavera Portfolio Management categories to P6 fields and codes. This step supports the mapping to three different types of P6 fields or codes in the Sub-Items Mode while to only two different types in the Phases Mode, as follows:

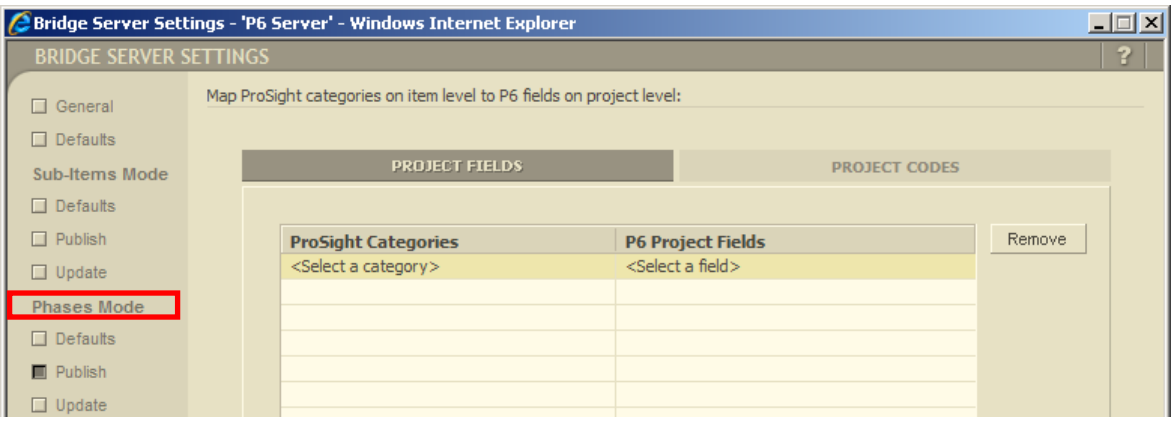
- Project Fields
- Project Codes
- WBS Fields (Sub-Items Mode only)

The *Publish* step accordingly, includes 3 or 2 tabs.

Project Fields Tab

The *Project Fields* tab, available for both the Sub-Items and Phases Modes, enables the administrator to map data from categories of the original Primavera Portfolio Management item to project fields of the mapped P6 project.





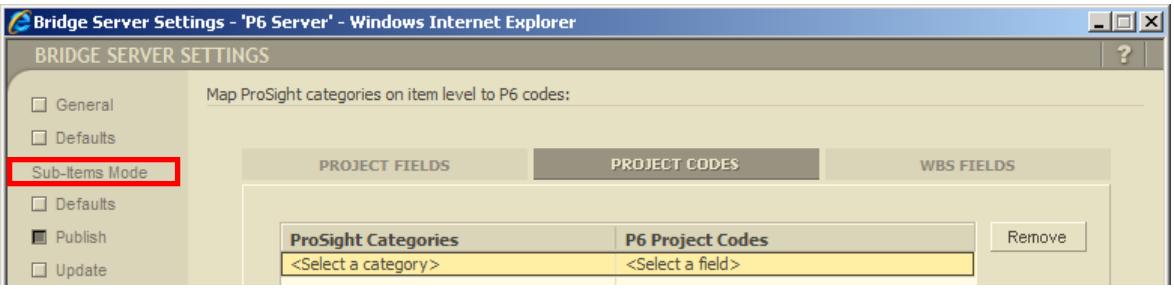
To map Primavera Portfolio Management Categories to P6 Project Fields:

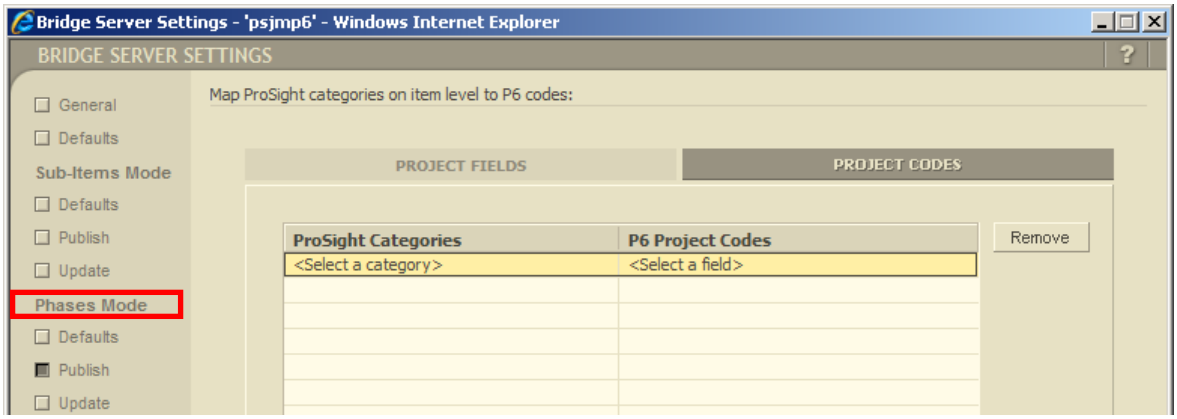
1 On the *Publish* step (of the selected mapping mode), select a category from the **Primavera Portfolio Management Categories** tab tree.

2 Select a field from the **P6 Project Fields** drop-down list to which the category should be mapped.

Project Codes Tab

The *Project Codes* tab, available for both the Sub-Items and Phases Modes, enables the administrator to map data from categories of the original Primavera Portfolio Management item to project codes of the mapped P6 project.





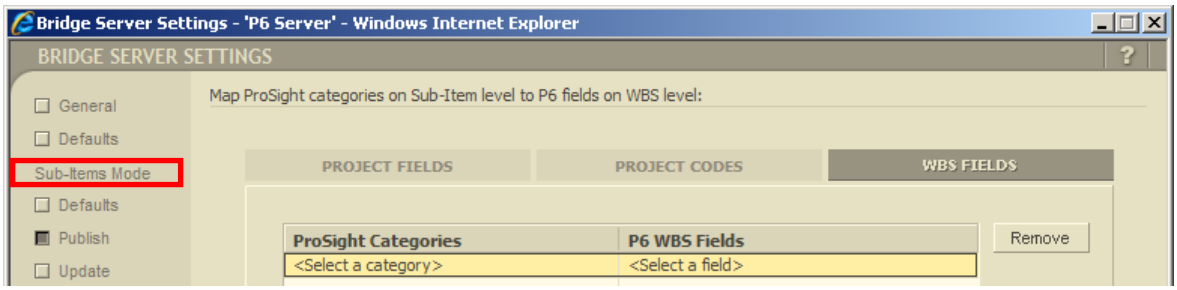
To map Primavera Portfolio Management Categories to P6 Project Codes:

1 On the **Publish** step (of the selected mapping mode), select a category from the **Primavera Portfolio Management Categories** tab tree.

2 Select a field from the **P6 Project Codes** drop-down list to which the category should be mapped.

WBS Fields Tab

The *WBS Fields* tab, available for the Sub-Items Mode only, enables the administrator to map categories of sub-items, to the WBS fields of the WBS elements to which these sub-items are mapped.



To map Primavera Portfolio Management Categories to P6 WBS Fields:

1 On the **Publish** step, select a category from the **Primavera Portfolio Management Categories** tab tree.

2 Select a field from the **P6 WBS Fields** drop-down list to which the category should be mapped.

Mapping the Update Fields – the Update Step

The *Update* step for either of the mapping modes in the *Bridge Server Settings* wizard enables the administrator to set system-wide policies for mapping P6 fields and codes to Primavera Portfolio Management categories. This step supports the mapping from four different types of P6 fields or codes in the Sub-Items Mode while from only three different types in the Phases Mode, as follows:

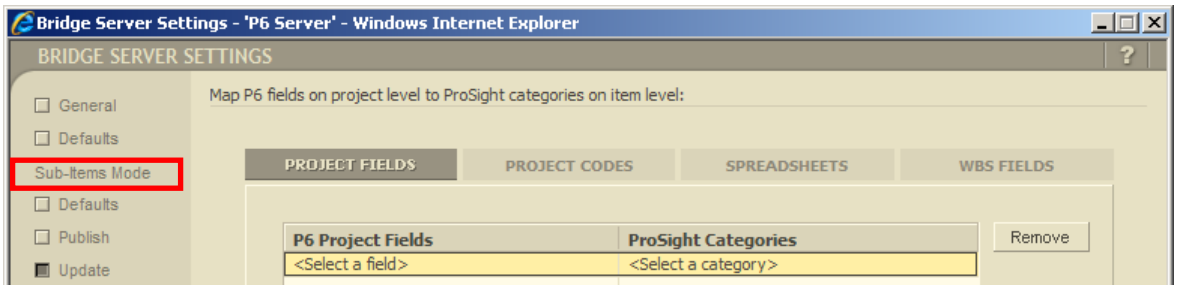
- Project Fields
- Project Codes
- Spreadsheets

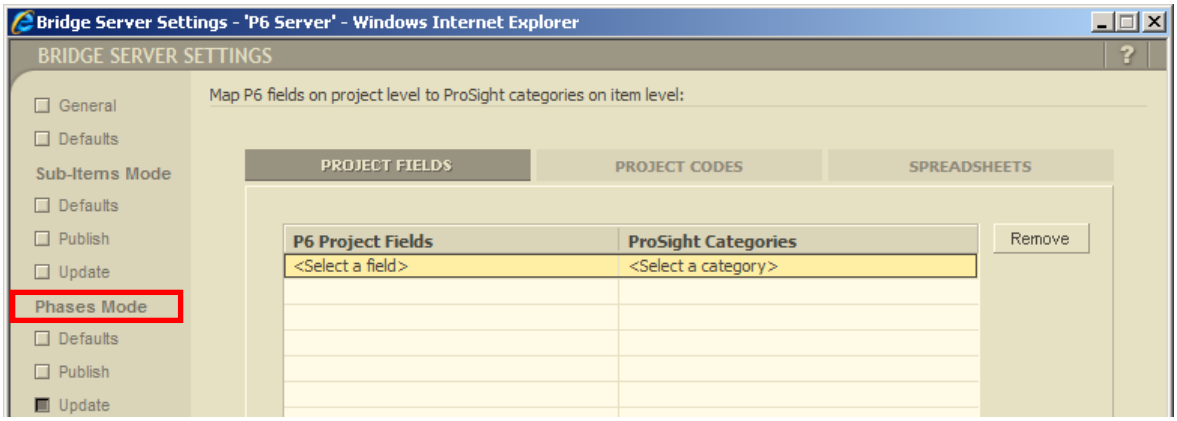
- WBS Fields (Sub-Items Mode only)

The *Update* step accordingly, includes 4 or 3 tabs.

Project Fields Tab

The *Project Fields* tab, available for both the Sub-Items and Phases Modes, enables the administrator to map project fields of the mapped P6 project to categories of the original Primavera Portfolio Management item.



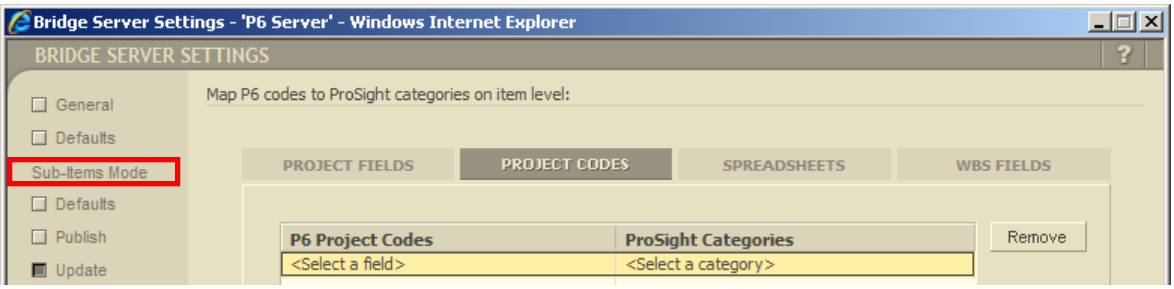


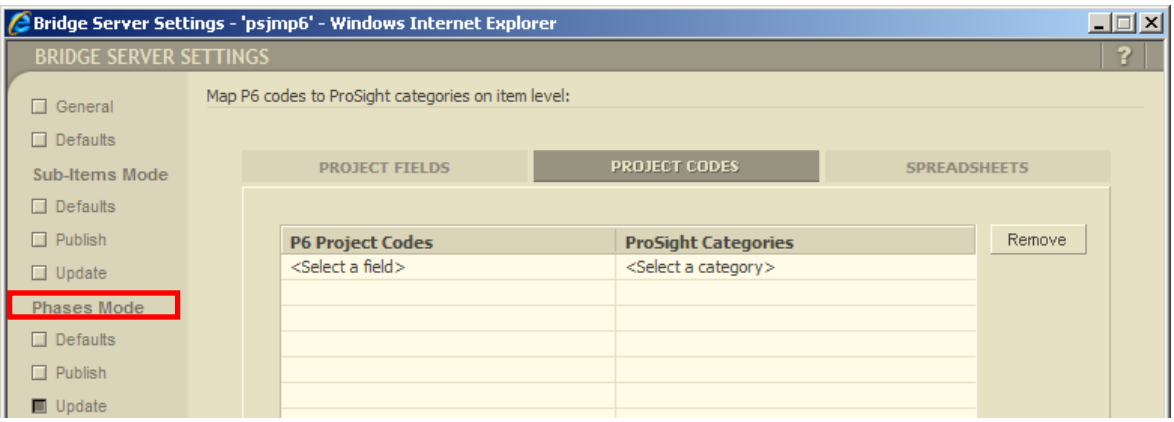
To map P6 Project Fields to Primavera Portfolio Management Categories:

1. On the *Project Fields* tab, select a field from the **P6 Project Fields** drop-down list.
2. Select a category from the **Primavera Portfolio Management Categories** tab tree to which the field should be mapped.

Project Codes Tab

The *Project Codes* tab, available for both the Sub-Items and Phases Modes, enables the administrator to map project codes of the mapped P6 project to categories of the original Primavera Portfolio Management item.



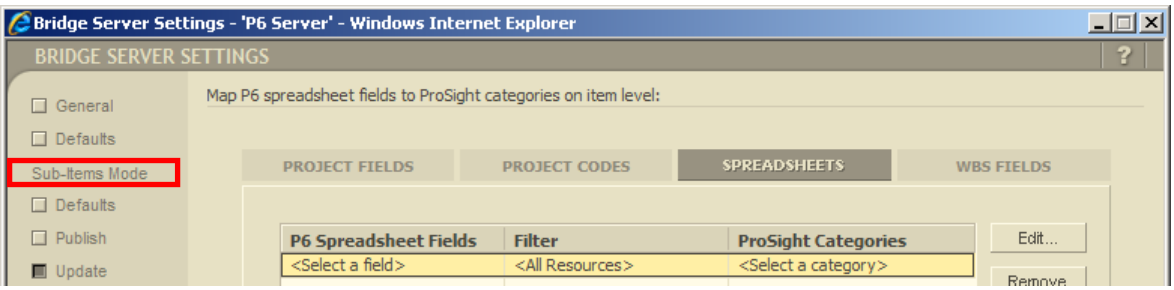


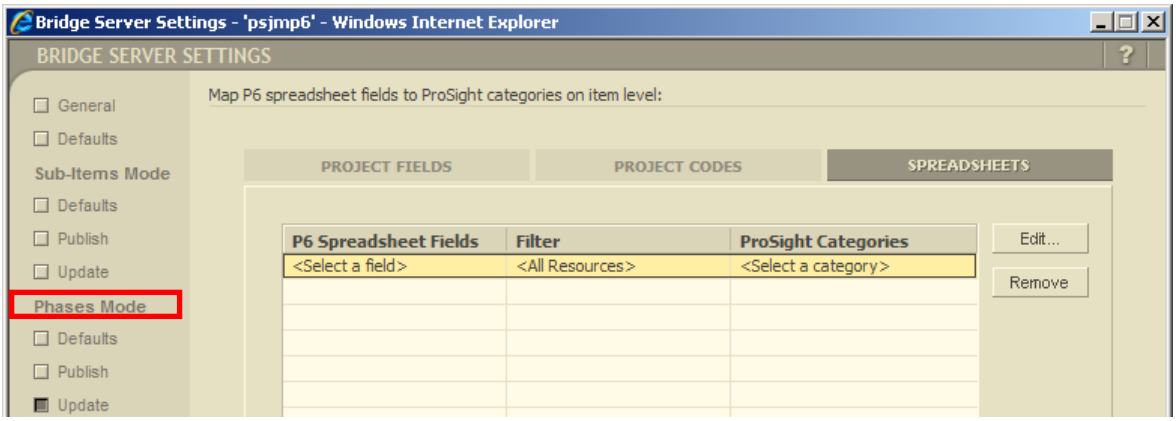
To map P6 Project Codes to Primavera Portfolio Management Categories:

1. On the *Project Codes* tab, select a field from the **P6 Project Codes** drop-down list.
2. Select a category from the **Primavera Portfolio Management Categories** tab tree to which the field should be mapped.

Spreadsheets Tab

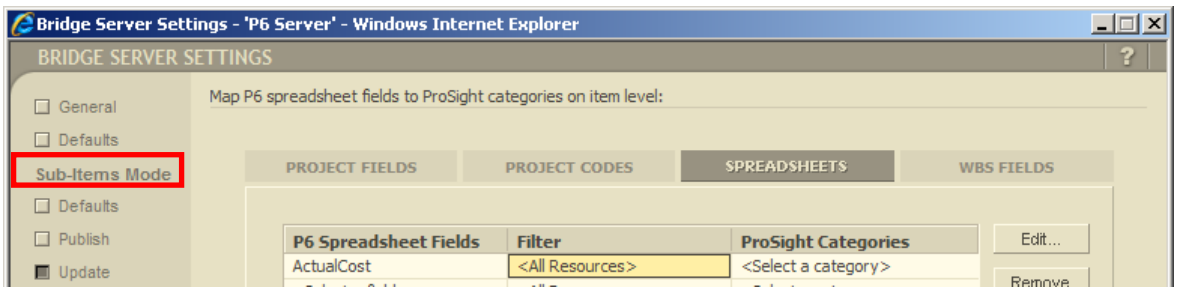
P6 Spreadsheets allow project data breakdown by time and resource. The *Spreadsheets* tab available, for both the Sub-Items and Phases Modes, enables the administrator to map this information from a P6 project to categories of the original Primavera Portfolio Management item.



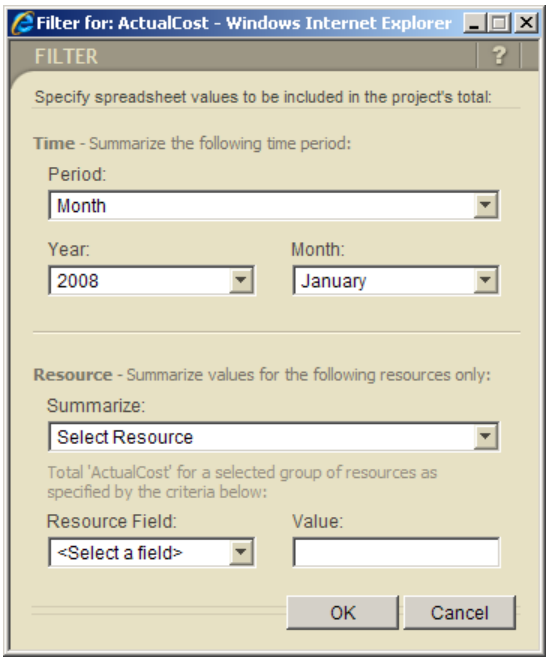


To map the P6 Spreadsheets Fields to Primavera Portfolio Management Categories:

1 On the *Spreadsheets* tab, select a field, such as ActualCost, from the **P6 Spreadsheet Fields** drop-down list, as shown below.



2 Click on the corresponding **Filter** cell. The *Filter* window opens, displaying Time and Resource information for the selected field.



3 In the **Time** section, select from the **Period** drop-down list the time period for which the cost or work should be calculated. There are four basic possibilities:

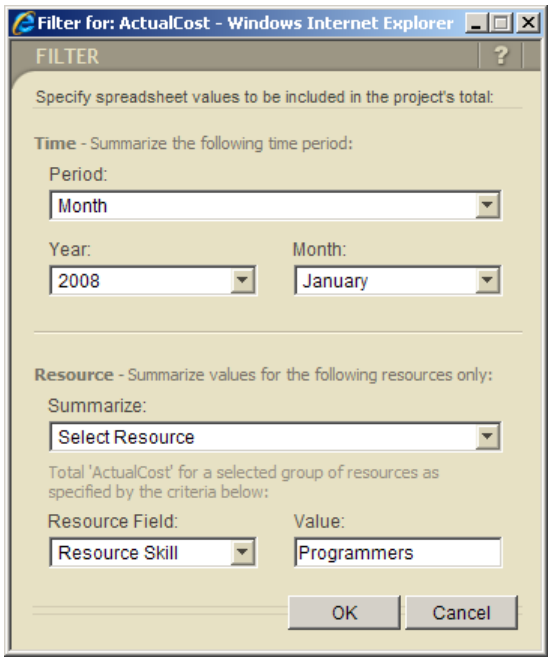
- All
- Year – where the specific year must also be selected
- Quarter – where the specific year and quarter must also be selected
- Month – where the specific year and month must also be selected

  Note: If you wish to select more than one slice of time, for example, two separate years 2005 and 2008, you can map the ActualCost field to two separate categories in Primavera Portfolio Management: e.g., Cost 2005 and Cost 2008.

4 In the **Resource** section, select the extent of resources for which you would like to have the cost or work summarized. Possible values are:

- **All Resources** – Total cost or work for the project.
- **Select Resource** – Total cost or work for a particular resource, as specified by the **Resource Field** and **Value** fields. In **Resource Field** you may select any P6 project resource field. In **Value**, you may enter the value by which the system will filter the selected **Resource Field**.

  For example, an administrator who wants to create a category called 'Programmers Actual Cost' can create a resource field in P6 called 'Resource Skill'. Under this field, all skill types in the organization (such as Programmers, DBAs, and MIS) are listed. The field name is specified in **Resource Field** and 'Programmers' is entered in the **Value** field, as shown below.

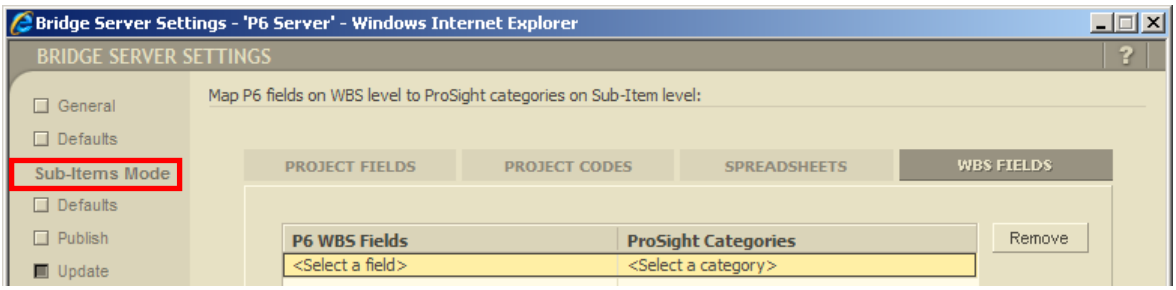


5 Click on the **OK** button. This will close the **Filter** dialog and update the Filter cell with Time Period and Resource information accordingly, as shown below.

6 Select a category from the **Primavera Portfolio Management Categories** tab tree to which the field should be mapped.

WBS Fields Tab

The WBS *Fields* tab, available for the Sub-Items Mode only, enables the administrator to map WBS fields of those WBSs that were originally mapped to Pro-Sight sub-items, to the categories of these sub-items.



To map P6 WBS Fields to Primavera Portfolio Management Categories:

1 On the *WBS Fields* tab, select a field from the **P6 WBS Fields** drop-down list.

2 Select a category from the **Primavera Portfolio Management Categories** tab tree to which the field should be mapped.

Appendix 1: Elements and Data Transferred in the Primavera Portfolio Management Sub-Items Bridge for Primavera P6

	Initial Publish (new item) (from Primavera Portfolio Management to P6)	**Subsequent Publish (mapped item)** (from Primavera Portfolio Management to P6)	**Update Item** (from P6 to Primavera Portfolio Management)
Basic Bridge (w/o Defaults, Methodology or Mappings)	**Item → Project Elements** 1. Item → Project (with same name as item) 2. Sub-Items (if exists) per Sub-Item → WBS element named after the Sub-Item **Item → Project Data** 3. Item Start Date → Project *Anticipated Start* field		
Methodology (w/o Defaults)	**Item → Project Elements** 1. Item → Project (named after the item, but defined by the selected template)		
Defaults	**Item → Project Elements** 1. Initial Item Start Date → *Start Date reference from Primavera Portfolio Management* project milestone 2. Initial Item End Date → *End Date reference from Primavera Portfolio Management* project milestone 3. New Sub-Item (with data) → New 2nd level WBS element (with data) 4. Removed Sub-Item → Removed corresponding 2nd level WBS element **Item → Project Data** 5. Item Start & *End* Dates[10] 6. Item + Sub-Item category data updates → Mapped[11] Project & 2nd level WBS fields **Link to Primavera Portfolio Management** 7. Primavera Portfolio Management Workbook link[12]	**Item → Project Elements** 1. New Sub-Item (with data) → New 2nd level WBS element (with data) 2. Removed Sub-Item → Removed corresponding 2nd level WBS element **Item → Project Data** 3. Item Start & End Dates[10] 4. Item + Sub-Item category data updates → Mapped[11] Project & 2nd level WBS fields **Link to Primavera Portfolio Management** 5. Primavera Portfolio Management Workbook link[12]	**Project → Item Elements** 1. New 2nd level WBS element (with data) → New Sub-Item (with data) 2. Removed 2nd level WBS element → Removed corresponding Sub-Item **Project → Item Data** 3. Project & 2nd level WBS field updates → Mapped[13] Item and Sub-Item Categories
Mappings	**Item → Project Data** 1. Primavera Portfolio Management Category → P6 Project Field 2. Primavera Portfolio Management Category → P6 Project Code **Sub-Item → WBS Data** 3. Primavera Portfolio Management Category → P6 WBS Field	**Item → Project Data** 1. Primavera Portfolio Management Category → P6 Project Field 2. Primavera Portfolio Management Category → P6 Project Code **Sub-Item → WBS Data** 3. Primavera Portfolio Management Category → P6 WBS Field	**Project → Item Data** 1. P6 Project Field → Primavera Portfolio Management Category 2. P6 Project Code → Primavera Portfolio Management Category 3. P6 Spreadsheet → Primavera Portfolio Management Category **WBS → Sub-Item Data** 4. P6 WBS Field → Primavera Portfolio Management Category

[10] This data is mapped to the *Start* & *Finish* fields of the *Start Date reference from Primavera Portfolio Management* and the *End Date reference from Primavera Portfolio Management* project milestones, respectively.

[11] If no Publish Mappings have been made from Primavera Portfolio Management categories to P6 Project and WBS fields, no Primavera Portfolio Management Item or Sub-Item data will be published to P6 except for Item Start and End dates.

[12] This data is mapped to the P6 Project Website URL field.

[13] If no Update Mappings have been made from P6 fields or codes to Primavera Portfolio Management categories, no P6 Project or WBS data will be updated to Primavera Portfolio Management.

Appendix 2: Elements and Data Transferred in the Primavera Portfolio Management Phases Bridge for Primavera P6

	Initial Publish (new item) (from Primavera Portfolio Management to P6)	**Subsequent Publish (mapped item)** (from Primavera Portfolio Management to P6)	**Update Item** (from P6 to Primavera Portfolio Management)
Basic Bridge (w/o Defaults, Methodology or Mappings)	**Item → Project Elements** 1. Item → Project (named after the item) 2. Phase (if exists) per phase → WBS element named after the phase[14] **Item → Project Data** 3. Item Start Date → Project *Anticipated Start* field 4. Phase Start[15] & End Dates[16]		
Methodology (w/o Defaults or Mappings)	**Item → Project Elements** 1. Item → Project (named after the item, with the entire WBS defined by the selected methodology)		
Defaults	**Item → Project Elements** 1. Initial Item Start Date → *Start Date reference from Primavera Portfolio Management* project milestone 2. Initial Item End Date → *End Date reference from Primavera Portfolio Management* project milestone 3. Initial Phase Date references → *Primavera Portfolio Management Phases* WBS element which includes a single *Reference* WBS element named after the phase,[17] per phase 4. Deliverable → Milestone activity named after the deliverable included in the WBS element named after its respective phase **Item → Project Data** 5. Item Start & *End* Dates[18] 6. Initial Phase Start & *End* Date references[19] 7. Deliverable *Due date*[20] **Link to Primavera Portfolio Management** 8. Primavera Portfolio Management Workbook link[21]	**Item → Project Elements** 1. (New) Deliverable → (New) Milestone activity after the deliverable included under the WBS element named after its respective phase **Item → Project Data** 2. Item Start & End Dates[18] 3. New Deliverable *Due Date*[20] **Link to Primavera Portfolio Management** 4. Primavera Portfolio Management Workbook link[21]	**Project → Item Data** **P6 WBS element Fields → Primavera Portfolio Management Phase Fields**[22] 1. BL1 Start & Finish dates → Planned Start & End dates 2. Start & Finish date → Forecast Start & End dates 3. Actual Start & Finish dates → Actual Start & End dates 4. Performance % Complete → % Completed **P6 Milestone Fields → Primavera Portfolio Management Deliverable Fields**[23] 5. Start & Finish dates → Due Date 6. Activity % Complete → Completed[24]

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[14] This WBS element includes the *<Planned Phase Duration>* WBS element which itself includes *<Planned Phase Start Date>* and *<Planned Phase End Date>* milestone activities.

[15] Uses *Forecast* dates if they exist. Otherwise *Planned* dates and if there are no *Planned* dates, Today. Never uses Actual dates.

[16] This data is mapped to the *Start* and *Finish* fields of the *<Planned Phase Start Date>*and *Planned Phase End Date>* milestone activities respectively.

[17] This WBS element includes *Start Date Reference* and *End Date Reference* milestone activities each named after the phase.

[18] This data is mapped to the *Start* & *Finish* fields of the *Start Date reference from Primavera Portfolio Management* and the *End Date reference from Primavera Portfolio Management* project milestones, respectively.

[19] This data is mapped to the *Start* & *Finish* fields of *Start Date Reference* and *End Date Reference* milestone activities named after the phase, respectively.

[20] This data is mapped to the *Start* & *Finish* fields of the milestone named after the deliverable.

[21] This data is mapped to a P6 Project Website URL field.

[22] This assumes that the WBS element is mapped to the Primavera Portfolio Management phase. There are two different ways to publish a Primavera Portfolio Management item so that its phases are mapped to corresponding WBS elements in P6: Either by publishing the item together with its phases (Basic Bridge above), or by publishing an item based on a P6 methodology which contains WBS elements identical in name to those of the phases of the original item.

[23] This assumes that this P6 milestone activity is mapped to a Primavera Portfolio Management deliverable. This is the case only if the summary task in which this milestone appears is mapped to the phase of the deliverable, and there is a milestone with the same name as that of the deliverable.

[24] Only if the Activity % Completed of the milestone = 100% will the deliverable's *Completed* field be checked.

Mappings	**Item → Project Data** 1. Primavera Portfolio Management Category → P6 Project Field 2. Primavera Portfolio Management Category → P6 Project Code	**Item → Project Data** 1. Primavera Portfolio Management Category → P6 Project Field 2. Primavera Portfolio Management Category → P6 Project Code	**Project → Item Data** 1. P6 Project Field → Primavera Portfolio Management Category 2. P6 Project Code → Primavera Portfolio Management Category 3. P6 Spreadsheet → Primavera Portfolio Management Category