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PRIMAVERA

Primavera Portfolio Management 8.0
URL Syntax

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Purpose

In many customer sites there's a growing need to address Primavera® Portfolio Management pages from external applications. The nature of the internet world accustoms people to the 'click' thinking. People expect to navigate between pages of different application by simply clicking a link.

To support this demand, application creators need to get familiar with the syntax used in Primavera® Portfolio Management (PPM) for creating its URL addresses. When one gets to know the syntax, it's as easy as typing a URL.

Primavera® Portfolio Management currently supports linking to the following pages: Investor module, Scorecard module, Workbook module, Forms module and Dashboard module.

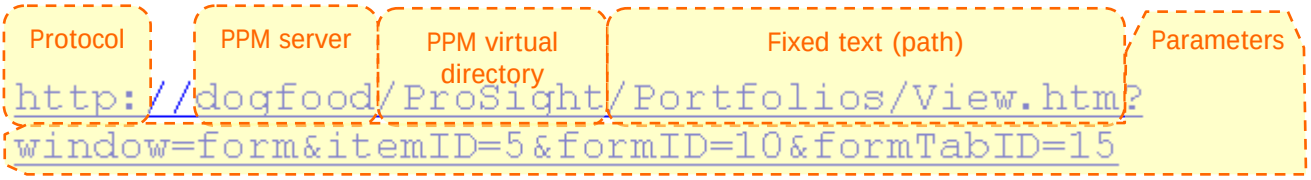
Syntax

The syntax is based on the following template:

<**protocol**>://< **PPM server**>/< **PPM virtual directory**>/Portfolios/View.htm?<**parameters**>

Protocol: http or https
PPM server: the name of the Primavera® Portfolio Management server
PPM virtual directory: the name of the Primavera® Portfolio Management virtual directory (usually ProSight)
Parameters: a (long) string of parameters that identifies the requested page

Example:



Parameters

Scope

The parameters part describes the content of the page.

The following options are supported:

Module (window)	View	Sub-view	Item	Others
Investor	Map	View mode (item or portfolio view mode)	Portfolio	Version, view mode, alternative axes
Scorecard	Scorecard	-	Portfolio	-
Workbook	Scorecard	Active tab	Portfolio or item	Dependencies

				type
Forms	Form	Tab	Portfolio or item	
Dashboard	Dashboard	Tab	Portfolio or item	-
To Do	To Do	Active Tab	-	-

Example: I'm viewing the Scorecard module with Scorecard=Risk and Portfolio=IT. The URL parameters include the Scorecard=Health and Portfolio=QA. After clicking the link, the following is displayed: Scorecard=Health and Portfolio=QA

Note:

1. There is no importance to the order of the parameters.
2. The window parameter is mandatory when specifying a view. The rest of the parameters may be left blank.
3. It is possible to have the process folder id as the single parameter as such a URL specifies a process folder to display and not a Portfolios view. Adding the process folder id parameter to view parameters will display the corresponding view along with the specified process folder.
4. There is some mandatory coupling: When the dashboard is selected as the module, the dashboard id or name and item id or name or UCI is mandatory. When UCI is used the category holding the UCI is mandatory.
5. When no view or sub-view is defined: the last (current) view or sub\view are used.

   Example: I'm viewing the scorecard module with Scorecard=Risk and Portfolio=IT. The URL parameters only include the Portfolio=QA. After clicking the link, the following is displayed: Scorecard=Risk; Portfolio=QA
6. When no item/portfolio is defined: the last (current) item is used.

   Example: I'm viewing the scorecard module with Scorecard=Risk and Portfolio=IT. The URL parameters only include the Scorecard=Health. After clicking the link, the following is displayed: Scorecard=Health; Portfolio=IT
7. There are basically two options to describe an object:
   a. By its name: it's easy to use (name is easy to find) but when the object is renamed, the link does not work anymore.
   b. By the ID (inner ID): it's harder to obtain it, but when the object is renamed, the link continues to work (unless it was renamed by the packager).

Rules

The parameters string is comprised of parameter name – parameter value pairs using the following template:

&<**parameter name**>=<**parameter value**>

Note: the first parameter name – value pair after the question mark in the URL should not start with an ampersand.

Parameters

Following is a list of parameter names and expected values.

General

Name	Purpose	Expected Value
window	Denotes the module to be displayed	Either 'map', 'sc', 'wb', 'form', 'db' or 'todo' Where 'map' – Denotes the Investor module 'sc' – denotes the Scorecard module 'wb' – denotes the Workbook module 'form' – Denotes the Forms module 'db' – Denotes the Dashboard module 'todo – Denotes the To Do module
itemID	Denotes the id of the item or portfolio to be displayed in the selected module	Number corresponding with the database id value of the selected item or portfolio
itemName	Denotes the name of the item or portfolio to be displayed in the selected module	Escaped string corresponding with the name of the selected item or portfolio
itemCI	Denotes the common identifier of the item or portfolio to be displayed in the selected module This parameter is used for OEM purposes	Number corresponding with the common identifier of the selected item or portfolio as set in the values of the category denoted by commonIDCategoryName
commonIDCategoryName	Denotes the category name holding the items or portfolios common identifiers This parameter is used for OEM purposes	Escaped string corresponding with the name of category holding the items and portfolios common identifiers

Investor

Name	Purpose	Expected Value
mapID	Denotes the id of the map to be displayed in the Investor module	Number corresponding with the database id value of the selected map
mapName	Denotes the name of the map to be displayed in the Investor module	Escaped string corresponding with the name of the selected map
viewMode	Denotes the map view mode to be displayed in the Investor module, relevant only when displaying a portfolio of portfolios	Either items or portfolios Where items – denotes items view mode portfolios – denotes portfolios view mode
verID	Denotes the id of the scenario to be displayed in the Investor module corresponding with the selected portfolio	Number corresponding with the database id value of the selected scenario
verName	Denotes the name of the scenario to be displayed in the Investor module corresponding with the selected portfolio	Escaped string corresponding with the name of the selected scenario
colorCatID	Denotes the color axis category id to be displayed in the map	Number corresponding with the database id value of the selected category
colorCatName	Denotes the color axis category name to be displayed in the map	Escaped string corresponding with the name of the selected category
sizeCatID	Denotes the size axis category id to be displayed in the map	Number corresponding with the database id value of the selected category
sizeCatName	Denotes the size axis category name to be displayed in the map	Escaped string corresponding with the name of the selected category
asOfDate	Denotes the as of date	Escaped string in format m/d/yyyy
asOfID	Denotes the version id	Number corresponding with the database id value of the version
asOfName	Denotes the version name	Escaped string corresponding with the name of the version

Scorecard

Name	Purpose	Expected Value
scID	Denotes the id of the scorecard to be displayed	Number corresponding with the database id value of the selected scorecard
scName	Denotes the name of the scorecard to be displayed	Escaped string corresponding with the name of the selected scorecard
asOfDate	Denotes the as of date	Escaped string in format m/d/yyyy
asOfID	Denotes the version id	Number corresponding with the database id value of the version
asOfName	Denotes the version name	Escaped string corresponding with the name of the version

Workbook

Name	Purpose	Expected Value
scID	Denotes the id of the scorecard to be displayed	Number corresponding with the database id value of the selected scorecard
scName	Denotes the name of the scorecard to be displayed	Escaped string corresponding with the name of the selected scorecard
tabName	Denotes the name of the workbook tab to be displayed	Either ‘sts’, ‘ai’, ‘lc’, ‘dlvr’, ‘dpnd’, ‘lnk’, ‘cnt’ Where ‘sts’ – Denotes the Status tab ‘ai’ – Denotes the Action Items tab ‘lc’ – Denotes the Life Cycle tab ‘dlvr’ – Denotes the Deliverables tab ‘dpnd’ – Denotes the Dependencies tab ‘lnk’ – Denotes the Links tab ‘cnt’ – Denotes the Contacts tab
dependenciesType	Denoted the dependencies type to be displayed in the dependencies tab	Either 1 or 2 where 1 – denotes ‘item depend on’ dependencies type 2 – denotes ‘depending on item’ dependencies type

Forms

Name	Purpose	Expected Value
formID	Denotes the id of the form to be displayed in the Forms module	Number corresponding with the database id value of the selected form
formName	Denotes the name of the form to be displayed in the Forms module	Escaped string corresponding with the name of the selected form
tabID	Denotes the id of the tab to be displayed in the Forms module corresponding with the displayed form	Number corresponding with the database id value of the selected tab
tabName	Denotes the name of the tab to be displayed in the Forms module corresponding with the displayed form	Escaped string corresponding with the name of the selected tab
asOfDate	Denotes the as of date	Escaped string in format m/d/yyyy
asOfID	Denotes the version id	Number corresponding with the database id value of the version
asOfName	Denotes the version name	Escaped string corresponding with the name of the version

Dashboard

Name	Purpose	Expected Value
dashboardID	Denotes the id of the dashboard to be displayed in the Dashboard module	Number corresponding with the database id value of the selected dashboard
dashboardName	Denotes the name of the dashboard to be displayed in the Dashboard module	Escaped string corresponding with the name of the selected dashboard
tabID	Denotes the id of the tab to be displayed in the Dashboard module corresponding with the displayed dashboard	Number corresponding with the database id value of the selected tab
tabName	Denotes the name of the tab to be displayed in the Dashboard module corresponding with the displayed dashboard	Escaped string corresponding with the name of the selected tab
asOfDate	Denotes the as of date	Escaped string in format m/d/yyyy
asOfID	Denotes the version id	Number corresponding with the database id value of the version
asOfName	Denotes the version name	Escaped string corresponding with the name of the version

To Do

Name	Purpose	Expected Value
tabName	Denotes the name of the to do tab to be displayed in the To Do module	Either ‘upd’, ‘req’, ‘ai’ or ‘dlvr’ Where ‘upd’ – Denotes the My Updates tab ‘req’ – Denotes the My Requests tab ‘ai’ – Denotes the Action Items tab ‘dlvr’ – Denotes the Deliverables tab

My Processes

Name	Purpose	Expected Value
processFolderID	Denotes the My Processes folder id to be displayed	Number corresponding with the database id value of the selected process folder

Notes:

- When a view is missing an expected parameter, it is automatically replaced by either the default or current value in the system. For example if an item identifier is missing, the default or current item is displayed.
- Parameter names and values are case insensitive.

Mandatory Parameters

- window is a mandatory parameter
- When the window parameter is ‘db’ (denoting the Dashboard menu) either dashboardID or dashboardName are mandatory parameters and either itemID or itemName or itemCI are mandatory parameters
- When item is denoted by the itemCI parameter commonIDCategoryName is a mandatory parameter

Escaping Strings

String escaping is the operation of replacing certain characters in a string with other characters that are valid for the usage of the string. When using name values in the Primavera® Portfolio Management URL, the values should be escaped.

Following is a list of characters that should be escaped and their escaped value:

Character	ASCII code	Escaped value
Space	32	%20
!	33	%21
“	34	%22
#	35	%23
$	36	%24
%	37	%25
&	38	%26
‘	39	%27
(	40	%28
)	41	%29
+	43	%2B
,	44	%2C
:	58	%3A
;	59	%3B

Character	ASCII code	Escaped value
<	60	%3C
=	61	%3D
>	62	%3E
?	63	%3F
[	91	%5B
\	92	%5C
]	93	%5D
^	94	%5E
`	96	%60
{	123	%7B
|	124	%7C
}	125	%7D
~	126	%7E

Any other character with an ASCII code smaller than 32 or larger than 126, should be escaped to the % character, followed by the hexadecimal value of the ASCII code.