ORACLE®

PRIMAVERA

Primavera Portfolio Management 8.0
Data Mapping and Data Flow
for the Bridge for Microsoft Project Server 2007

Copyright © 1999-2010, Oracle and/or its affiliates.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Data Mapping and Data Flow in the Primavera Portfolio Management Bridge for Microsoft Project Server 2007

Overview 2
Publishing Items 2
Basic Project Content 2
Setting Default Bridge Settings when Publishing Primavera Portfolio Management Items 4
Publishing Portfolios 7
Viewing a Published Item in MS Project Server 10
Project Server Web Access 10
Updating Data from Microsoft Project Server 12
Updating From Task and Project Fields 12
Updating Phase and Deliverable Information 13
Mapping Primavera Portfolio Management Categories and MSP Fields 16
Unidirectional Data Sharing Principle 16
Types of MS Project Fields 17
Mapping the Publish Fields – the Publish Step 18
Viewing Published Category Information in the Project Client 19
Mapping the Update Fields – the Update Step 20
Appendix 1: Elements and Data Transferred in the Primavera Portfolio Management Bridge for Microsoft Project 28

Overview

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

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

When an item is published for the first time, the PM Bridge will create a new project in Microsoft Project Server and map it to the item. In the most basic configuration, the system creates tasks in the new project plan based on phases in the item's life cycle. In template-based configurations the new Primavera Portfolio Management item-generated project can be created on the basis of a Project Server template. In either case, the system may also be configured to publish Primavera Portfolio Management deliverables as milestones, or add tasks or milestones as references to Primavera Portfolio Management item and phase schedule information. In addition, Primavera Portfolio Management categories can be mapped to MS Project Enterprise Custom Project Fields and task fields 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 Project Server 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. Subsequent publishing of the item transfers only new information to the project.

Basic Project Content

The project's actual content depends on whether the organization wants to base this project on the Primavera Portfolio Management item's life cycle or on an MS Project template that reflects standard project-related processes in the organization.

In the former case, the project plan becomes populated with tasks and milestones based on the item's Life Cycle information in Primavera Portfolio Management[1]. Specifically, each life cycle phase of the

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

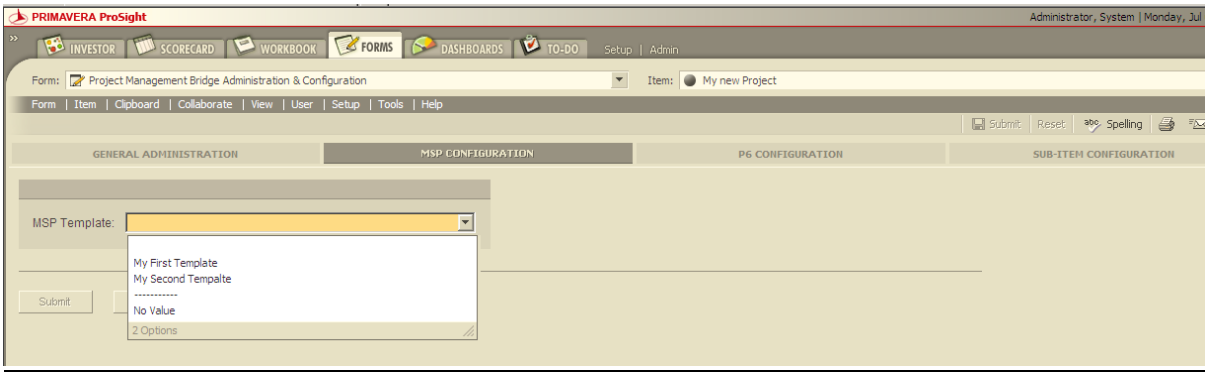
Primavera Portfolio Management item will be created as a summary task of the MSP project, with their Forecast Start and End Dates[2] being created as milestones[3].

In the latter case, the system creates a project plan populated with the tasks, summary tasks, and milestones prewritten in the template.

Note: If there are summary tasks in the selected Project Server template with the identical names as the phases in the Primavera Portfolio Management item's life cycle, the bridge will map these summary tasks to their corresponding phases, thus enabling the sharing of schedule information and deliverables. This can be done either by defining the summary task names in the template according to the phase names, or by naming new Primavera Portfolio Management life cycle phases according to the organizational phases in the Project Server template.

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

- **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 Microsoft Project Server template that user wants to use, as shown below:



- **Automatically,** by the system – In this case, the administrator sets the life cycle names in Primavera Portfolio Management to match the names of Project Server templates. When an item to which one of these life cycles is assigned is initially published, the corresponding project in MSP will be created according to the Microsoft Project Server template whose name matches that of the item's life cycle.

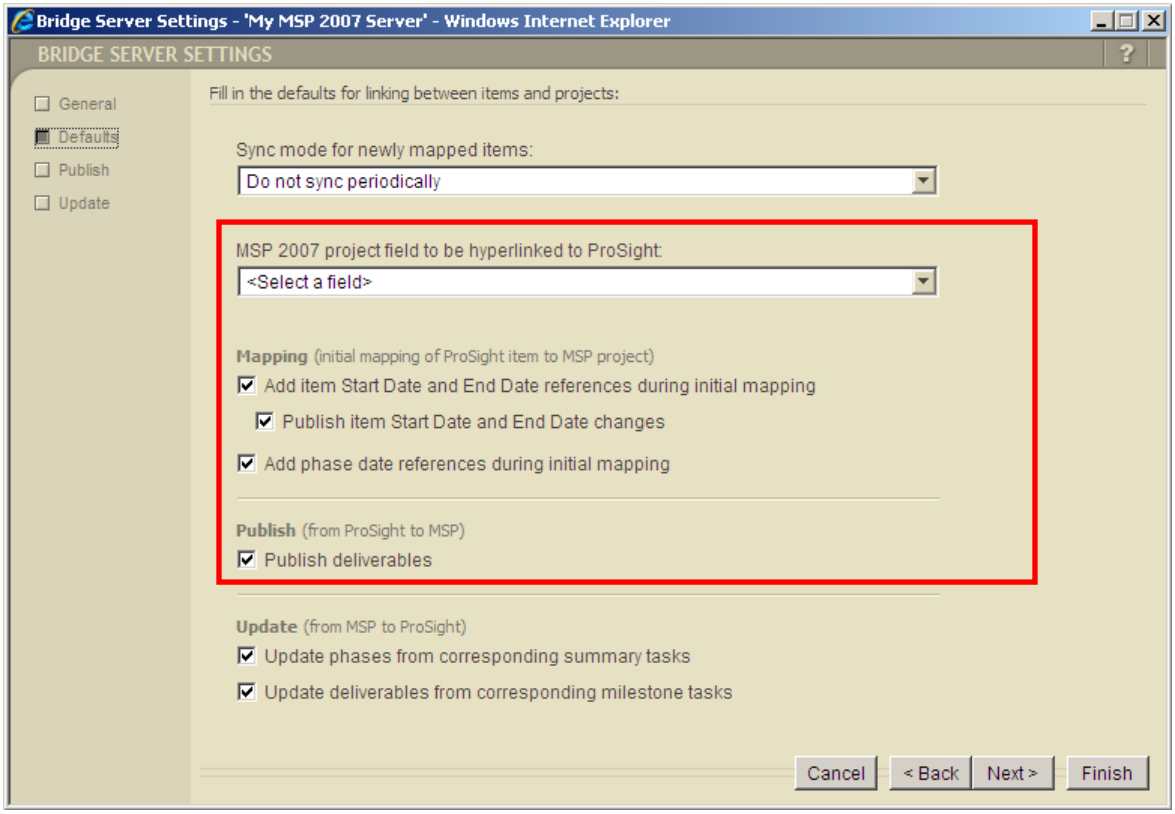
  Note: If a user has manually specified which template to use, the system will override the automatic Life Cycle name matching selection.

---

[2] If both Forecast Start and End Dates are not present, then Planned Start and End Dates will be used. If these are also missing, then the date of initial publishing will be used.

[3] This correctly describes the MSP 2007 bridge. In the MSP 2003 bridge, the phase Start and End dates will not appear as milestones, but will be recorded as the Start and Finish dates of a Phase Duration task.

Setting Default Bridge Settings when Publishing Primavera Portfolio Management Items



The *Defaults* step of the Bridge Server Settings wizard supports the addition of reference information to the newly created project plan. References are task level entries in the project that refer back to the original Item and Phase Start and End dates in Primavera Portfolio Management. In addition, this step supports the publishing of all deliverables.[4]

Item Start Date and End Date References

The bridge can be configured so that Primavera Portfolio Management Start and End dates appear in the corresponding Project Server Start and Finish fields. The dates are displayed in the task area as **Primavera Portfolio Management References**, and are represented in the Gantt as milestones (◆). This setting includes an option for having item Start and End Date changes in Primavera Portfolio Management be reflected in its corresponding Microsoft Project Server project, after the project is next published.

Phase Start Date and End Date References

The bridge can also be configured so that phase date references can be published under a Summary Task called **Primavera Portfolio Management Phases** together with the original Start and End dates of

---

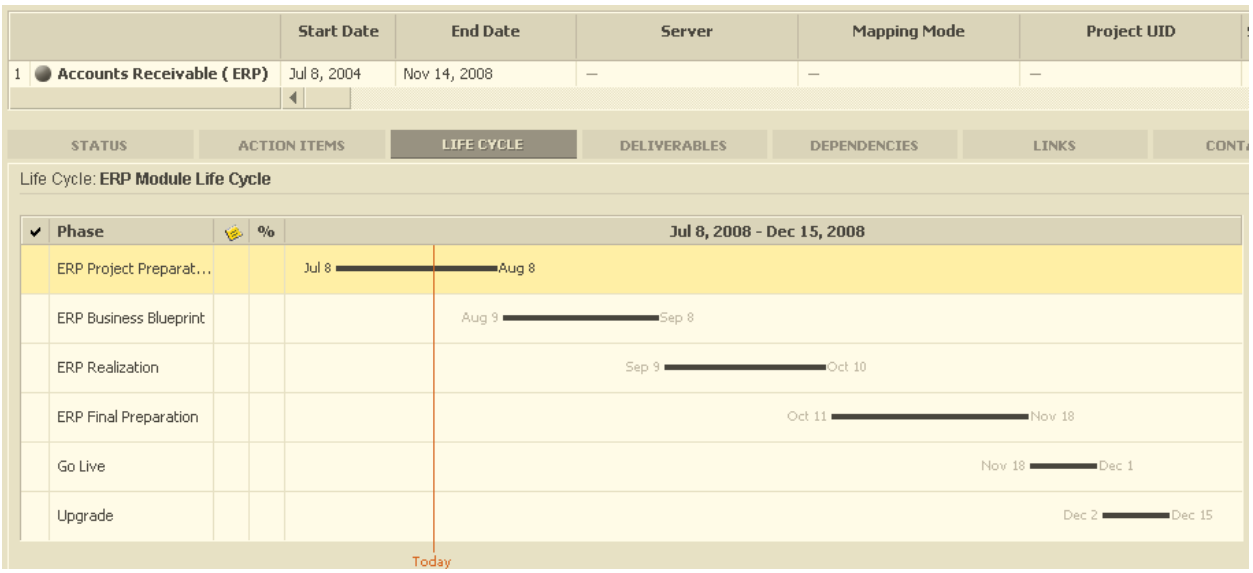
[4] This step also includes a field *MSP project field to be hyperlinked to Primavera Portfolio Management* which will contain the URL to the Primavera Portfolio Management item which is linked or to the MSP project.

the published phases. The tasks are named after their respective phases, with the addition of the word "Reference." These task fields never receive updated information during subsequent publishing.

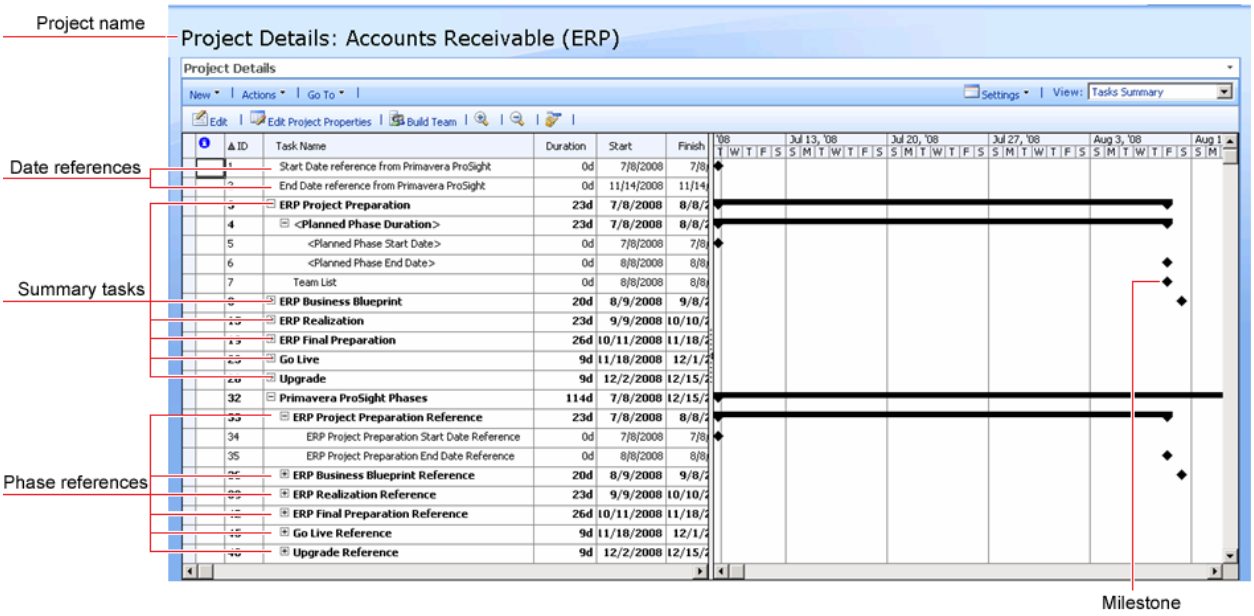
Deliverables

Another setting supports the publishing of Primavera Portfolio Management deliverables. They appear as a milestone under the Summary Task that represents the deliverable's phase.

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



will appear in MS Project, as shown below[5]:



- The new project 'Accounts Receivable (ERP)' has the same name as the published item
- Date references refer to the initial Start and End dates of the item

[5] This reflects their display in MSP 2007. The item and phase reference dates are displayed in MSP 2003 in a slightly different fashion.

- The Summary Tasks have the same names as the item's Phases from the Life Cycle in Primavera Portfolio Management ('ERP Project Preparation', 'ERP Business Blueprint', 'ERP Realization', 'ERP Final Preparation', 'Go Live', and 'Upgrade'). Summary tasks with the same name as Phases of the item in Primavera Portfolio Management are automatically mapped to these phases. Their tasks mark the Forecast Start and End dates of each phase, as recorded in Primavera Portfolio Management.
- Phase References refers to a second kind of summary task named 'Primavera Portfolio Management Phases'. This is used to reference the original schedule for the Phases, as published during the initial publishing of the item. This summary task contains additional summary tasks for each phase. Each of these latter summary tasks contains Phase Start and End Date reference milestones. These tasks mark the original planned dates of the phases, as recorded in Primavera Portfolio Management and do not change during subsequent publishing.
- A milestone on the Gantt chart is created for each deliverable published from Primavera Portfolio Management, such as the milestone displayed for 'Team List'.

Publishing Portfolios

Projects are created and updated only on the basis of published items and not portfolios of items. Therefore, when initially publishing a portfolio of items, no new project is created based on this portfolio. 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. No items have been previously published - the user can specify a single Project Management system server as the destination for the items
2. All items have been previously published – all items will be updated with any new information
3. 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 Microsoft Project Server.

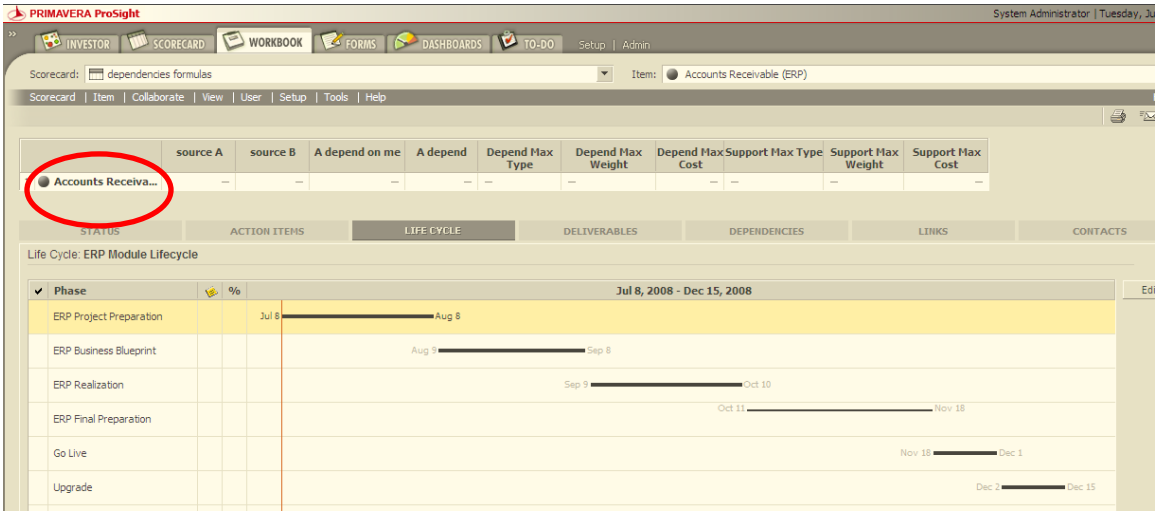
To publish an item:

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

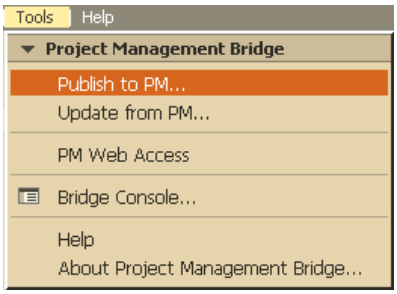
---

[6] Portfolios of portfolios cannot be published.

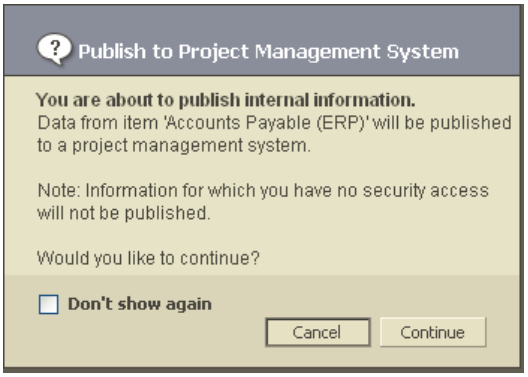
Note: Open the life cycle of the item and note phases schedule details for later comparison.



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

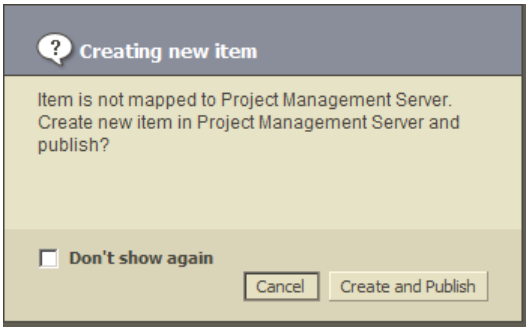


A confirmation dialog box appears.



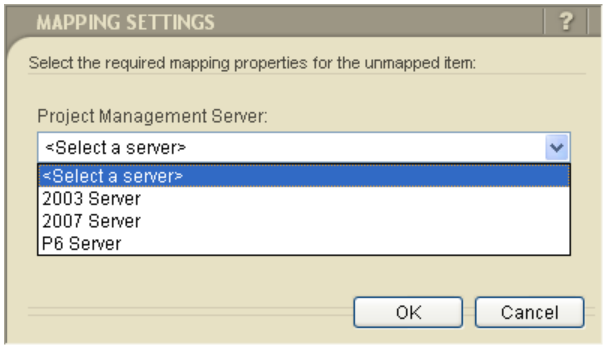
3 Confirm that you want to publish the specified item or portfolio by clicking Continue.

The following dialog box appears:



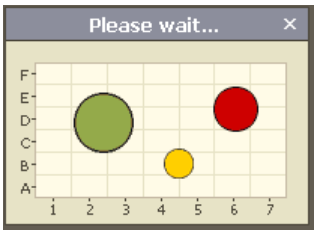
Note: The Publish process has no "undo" feature. Once published, only a Project Management system administrator can remove a project by deleting it from the server.

Note: When multiple Project Management system servers are mapped to Primavera Portfolio Management, the system asks the user to define the server to which each item should be initially published, as shown below:



This destination server is 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 performed 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 Project Management system 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 MS Project Server

There are three ways of viewing projects in Project Server:

- Connecting to Project Web Access with a web browser
- Opening the project in MS Project desktop client.
- Accessing information through web portlets in Forms.

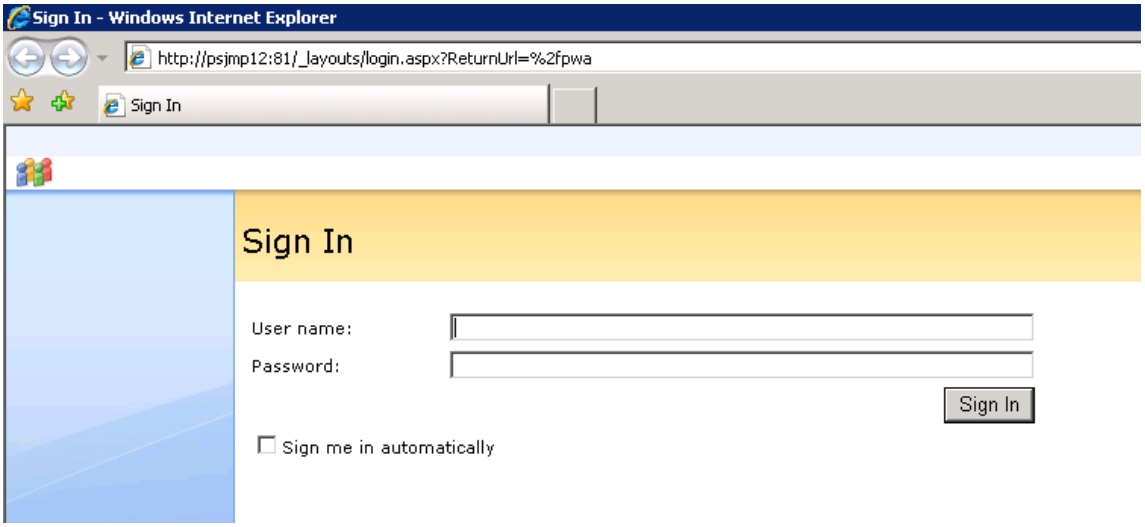
  Note: Web portlets are a feature your system administrator can build into a Primavera Portfolio Management Form, giving you a view of your project plan on Microsoft Project Server. For more information, see Chapter 7 in the Project Management Bridge help, *Viewing Information from the Project Management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

Project Server Web Access

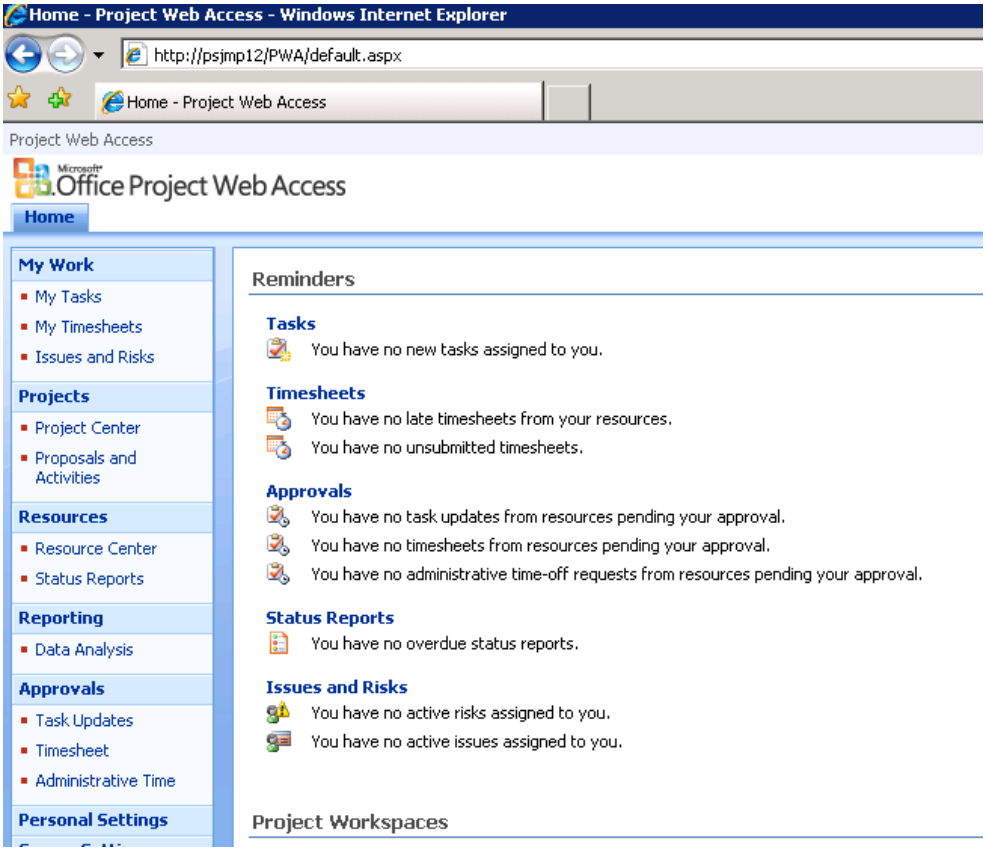
Project Server Web Access allows you to open the web page link of the project on Microsoft Project Server which is linked to the item you are looking at in Primavera Portfolio Management.

To view the project in Project Web Access:

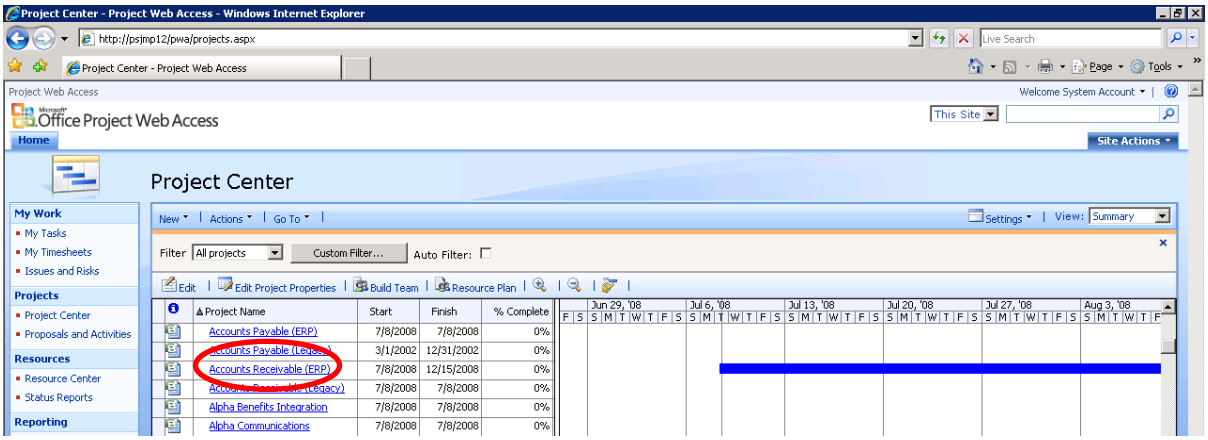
1 Open a browser window and connect to your company's Project Web Access. If you do not work with Windows Authentication, the Login window appears.



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

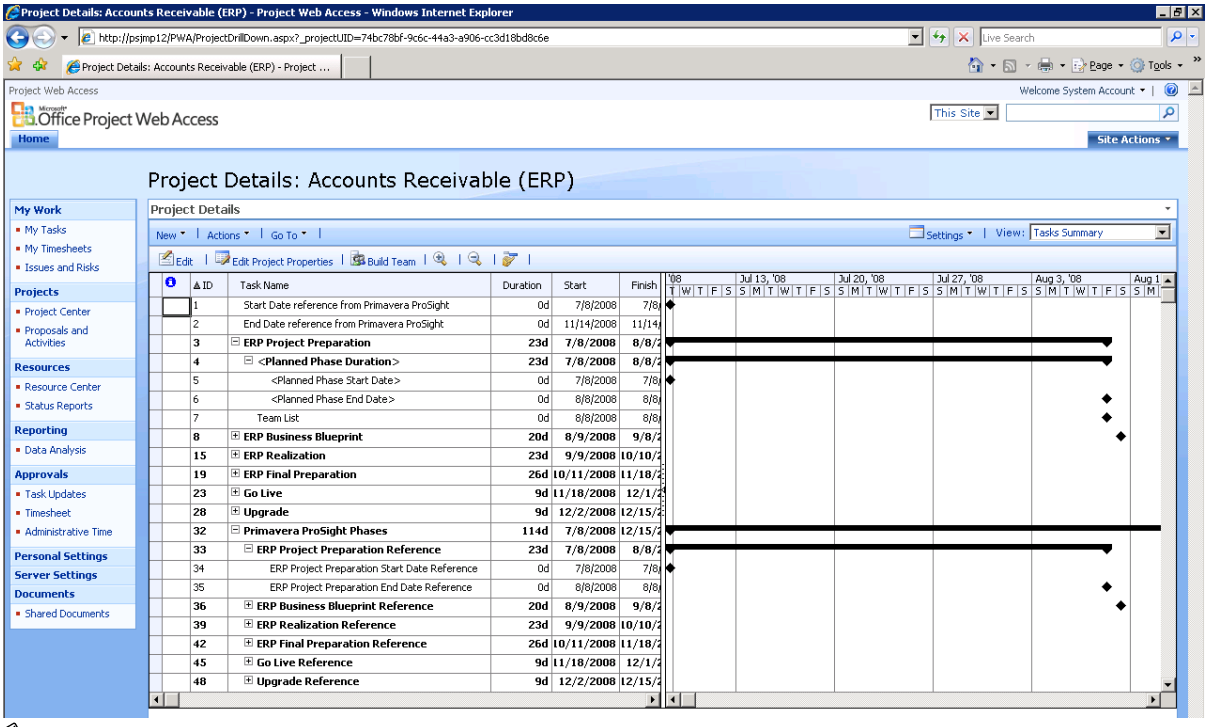


3 Click **Projects** from the menu bar to verify that the project has been published. The *Project Center* window appears.



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 varies according to the default view of Project Server.

Updating Data from Microsoft Project Server

The Update feature enables the portfolio manager to monitor the progress of projects in Microsoft Project Server from within Primavera Portfolio Management. 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 MSP project or task fields will also be updated – see *Mapping Primavera Portfolio Management Categories and MSP Fields*)

You can access the Update command from the Investor, Scorecard, Workbook, Forms and Dashboards 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 Microsoft Project Server that has previously been mapped to a Primavera Portfolio Management item.

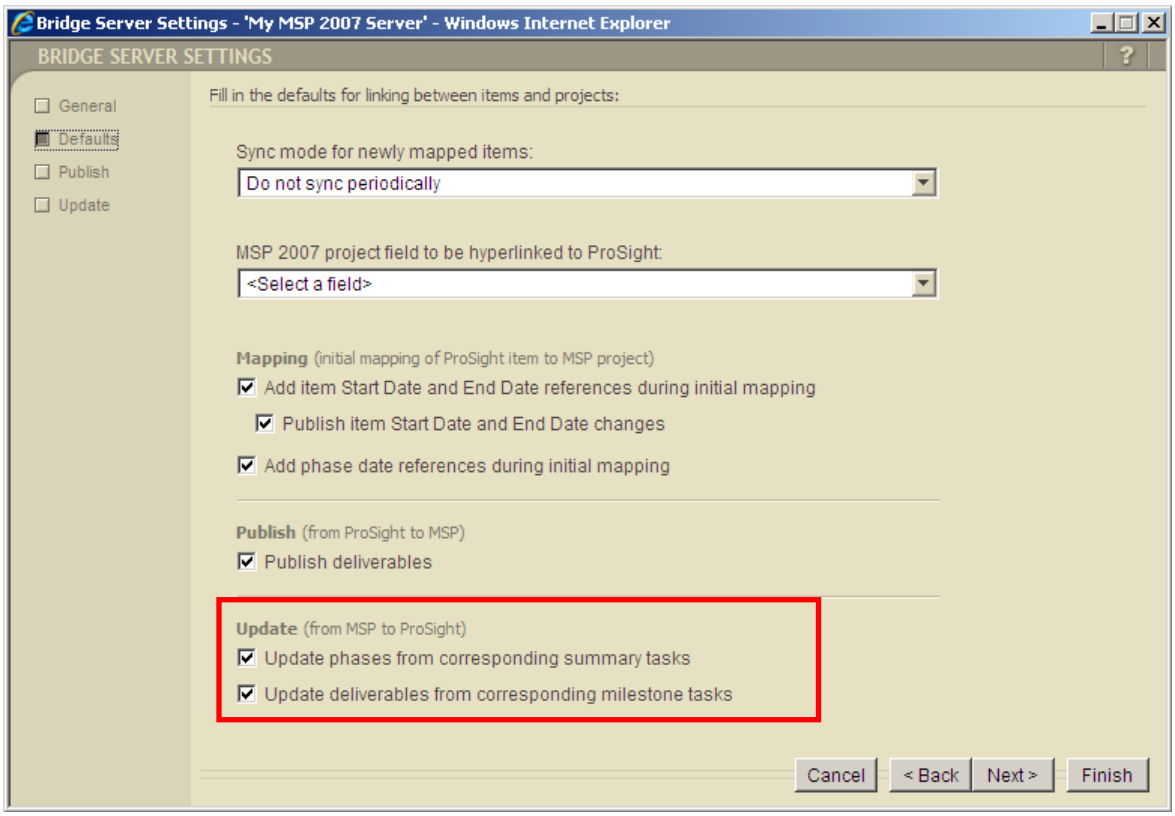
Note: The categories to be updated are selected in advance by your system administrator. For information about which categories are updated, speak to your system administrator.

Updating From Task and Project Fields

When updating from MS Project, new information from both Task and Project fields are updated in Primavera Portfolio Management.

Updating Phase and Deliverable Information

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



Phase Information

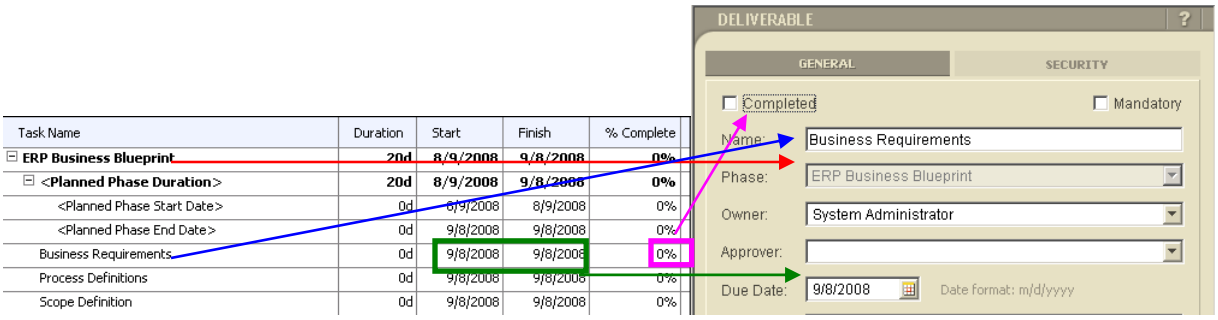
Date-associated task information is updated from Summary Tasks that are mapped to Primavera Portfolio Management Start and End dates. The update process searches for item phases that match the project's summary task names. If your administrator has elected to update phase information to Primavera Portfolio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

MS Project Task field	Primavera Portfolio Management Phase Field
Baseline (unnumbered) Start date	Planned Start date
Baseline (unnumbered) 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
% Complete	% Complete

Deliverables Information

When Primavera Portfolio Management Deliverables are mapped to MS Project milestones[7], the bridge can be set such that changes in the milestone *Start* and *Finish* dates or *% Complete* in Microsoft Project Server 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.

MS Project Milestone Field	Primavera Portfolio Management Deliverable Field
Start & Finish dates	Due Date
% Complete	Completed



The following sections describe how to update Primavera Portfolio Management information from Microsoft Project Server.

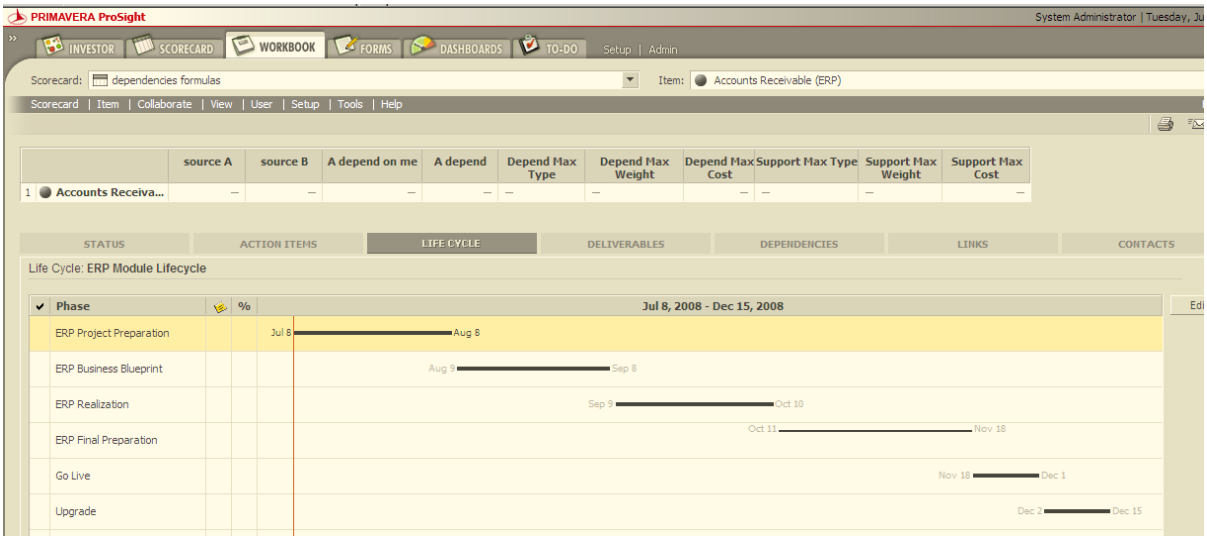
---

[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 MS Project template, where the template contains a summary task with a milestone which are named identically as one of the Primavera Portfolio Management item's phases and its deliverable, respectively.

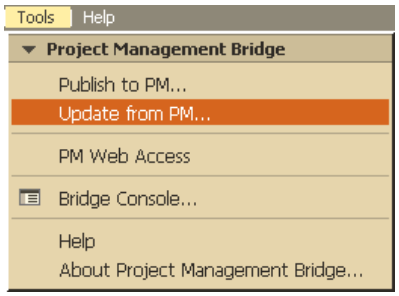
[8] If the Deliverable milestone % Complete in Project is 100% then the Deliverable Completed (√) checkbox in Primavera Portfolio Management is checked. If % Complete is less than 100%, the checkbox is not checked.

To update from Microsoft Project Server:

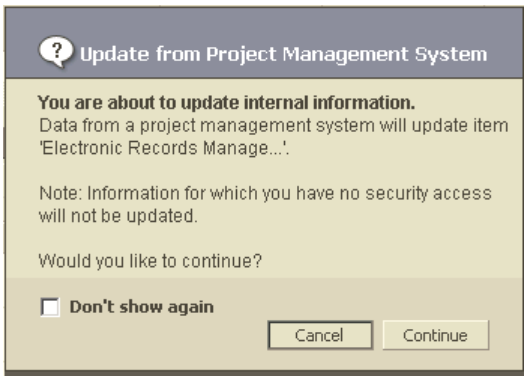
1 Navigate to the item or portfolio of items you want to update. You may wish to note the phase and other updateable information.



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 MSP Fields

In addition to synchronizing Primavera Portfolio Management phase and deliverable schedule and completion information with MS Project fields, the Primavera Portfolio Management Bridge for Microsoft Project Server 2003/7 can also synchronize Primavera Portfolio Management categories with MS Project fields.

Administrators first need to define which categories participate in publish and which in update. Each of these categories must be mapped to a field in MS Project.

Categories that are set to publish can be mapped to any MS Project Enterprise Custom Project Field of a matching data type. During the publishing process, the mapped MS Project field will be updated with new information coming from Primavera Portfolio Management. If no project is currently mapped to a published item, the system creates a new project in MS Project Server.

Categories that are set to update can be mapped to either MS Project Enterprise Custom Project Fields or task fields of matching data types. During the update, the category will be updated with new information coming from the field to which it is mapped in MS Project.

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 MS Project should not be updated with information from MS Project. A Primavera Portfolio Management category that gets updated by information from MS Project should not be set to publish information to MS Project. Similarly, MS Project fields that update their data to Primavera Portfolio Management categories should not receive data from Primavera Portfolio Management, and MS Project fields that receive data from Primavera Portfolio Management should not be set to update categories.

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

Note: If in certain projects you want the information in a specific category to be derived from MS Project, while in other projects you want information to be entered directly in 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 MS Project, and in other projects you want this date to be entered directly in Primavera Portfolio Management, perform the following:

- Create a category called "MS Project Planned Start Date" to receive the planned start date from MS Project.
- 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 "MS Project" 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 "MS Project Planned Start Date" or "Primavera Portfolio Management Planned Start Date", based on the "Master Source" category.

Types of MS Project Fields

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

- Project Fields
- Task Fields
- Cost/Work Project Field data fetched from the Reporting Data Base (Project Server 2007) / OLAP Cube (Project Server 2003)

Project Fields

Project fields, also known as Enterprise Custom Project Fields, provide a space for portfolio managers to publish goals and expectations to the project manager. Project managers can use these fields to report values that are not aggregated from the task level, such as textual comments and health evaluations. Each Enterprise Custom Project Field can be mapped for either publishing or updating.

In MS Project, Enterprise Custom Project Fields are accessed through the *Project Information* dialog box. (In MSP 2007, they are defined and accessed in PWA.) In this dialog box, project managers can record non-task related data that should be updated to Primavera Portfolio Management on the next Sync or Update (Existing information in the category is overwritten during the update.), as well as view target data that is published by the portfolio manager.

Note: MS Project Enterprise Custom Fields must be defined by the MS Project administrator.

Task Fields

Task fields are fields in MS Project such as cost or work hours that contain a value for each task in the project. The aggregated field value of the tasks in the project (such as total cost or total working hours) can be mapped to a category in Primavera Portfolio Management. Mapping a task field to a Primavera Portfolio Management category allows the project manager to update Primavera Portfolio Management with accurate project level information that is calculated from the detailed project plan.

Cost/Work fetched from Reporting Database Fields (Project Server 2007 only)

When the portfolio manager wants a breakdown of cost or work by time slices or by resource type (such as Cost 2004 or Programmers Work Hours), he needs to map to data in the MS Project Reporting Database (RDB). The RDB is a data source that allows third party applications such as Primavera Portfolio Management to extract data that is filtered by resource type or time slices from MS Project Server.

Not all fields are available through the RDB. Fields that are available through the RDB are generally task fields.

Note: The information in the RDB is copied from the Project Server real-time data by a back end process which can cause it to be a little out of sync. For more information please refer to the Microsoft Project Server 2007 manual.

Cost/Work fetched from OLAP Cube Fields (Project Server 2003 only)

When the portfolio manager wants a breakdown of cost or work by time slices or by resource type (such as Cost 2004 or Programmers Work Hours), he needs to map to data in the MS Project OLAP Cube. The OLAP cube is a data source that allows third party applications such as Primavera Portfolio Management to extract data that is filtered by resource type or time slices from MS Project Server.

Not all fields are available through the OLAP Cube. Fields that are available through the OLAP Cube are generally task fields.

Note: The information in the OLAP Cube is only as current as the last time it was run. To get the most recent and accurate information updated in MS Project, the OLAP Cube should be updated prior to running the update in Primavera Portfolio Management.

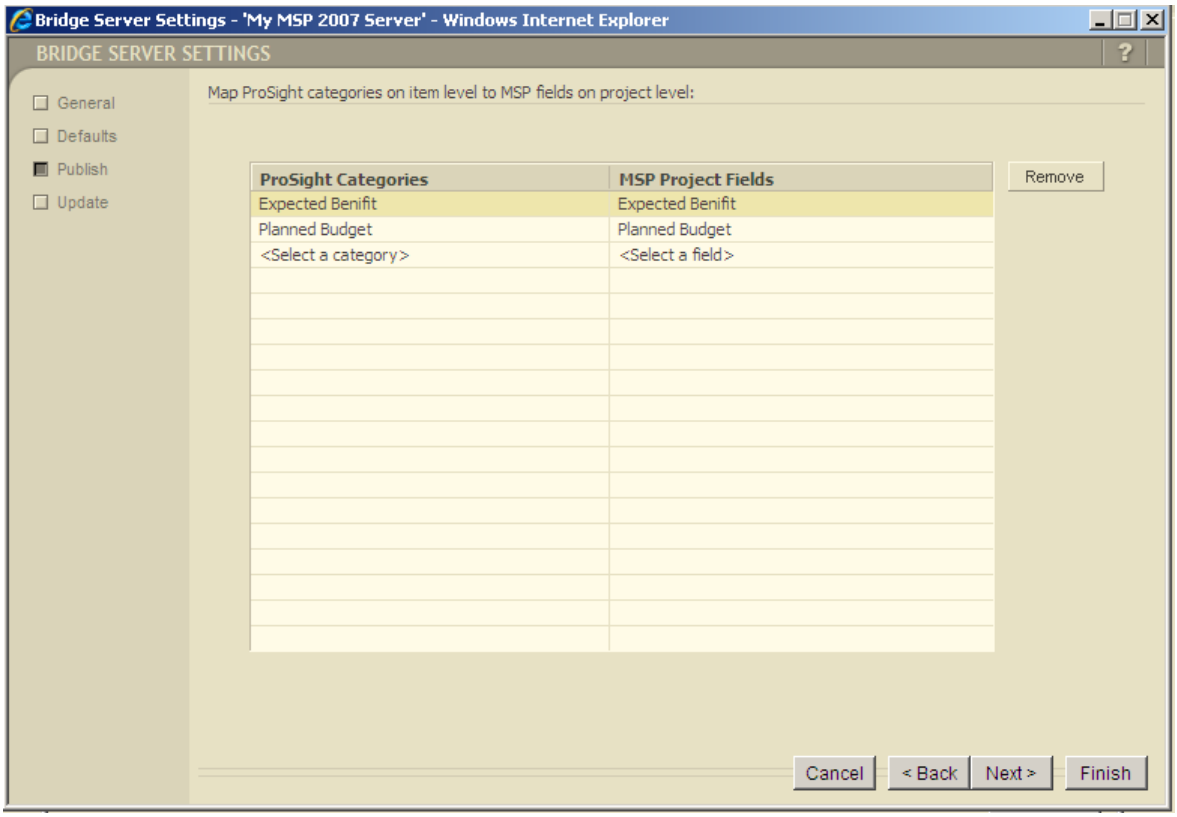
Note: For information on OLAP Cube installation and administration, refer to the Primavera Portfolio Management Bridge for MS Project 2003 Install Guide.

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

Mapping the Publish Fields – the Publish Step

The *Publish* step in the *Bridge Server Settings* wizard enables the administrator to set system-wide policies for mapping Primavera Portfolio Management categories to MSP project fields.

Note: Categories from Primavera Portfolio Management can be published only to Enterprise Custom Project Fields.



To map Primavera Portfolio Management Categories to MSP Project Fields:

1. On the *Publish* step, select a category from the **Primavera Portfolio Management Categories** tab tree.
2. Select a field from the **MSP Project Fields** drop-down box.

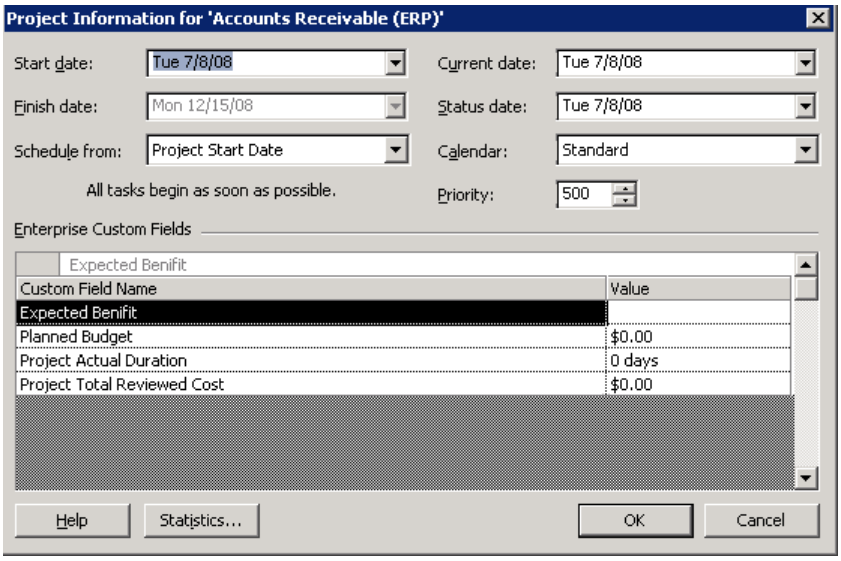
Viewing Published Category Information in the Project Client

Project managers and portfolio managers with access to the Project client can view these Enterprise Custom Project Fields, in the *Project Information* dialog box. (In MSP 2007, they can also be defined and accessed in the PWA.)

To access Enterprise Custom Project Fields:

1. Start Microsoft Project Server client.
2. Select **File** > **Open**.
3. Select the project you published and open it.

4 From the **Project** menu, select **Project Information**. The *Project Information* dialog box appears:



Note: Contact your system administrator to determine which fields are mapped for publishing, and which fields are mapped for updating in your system.

Mapping the Update Fields – the Update Step

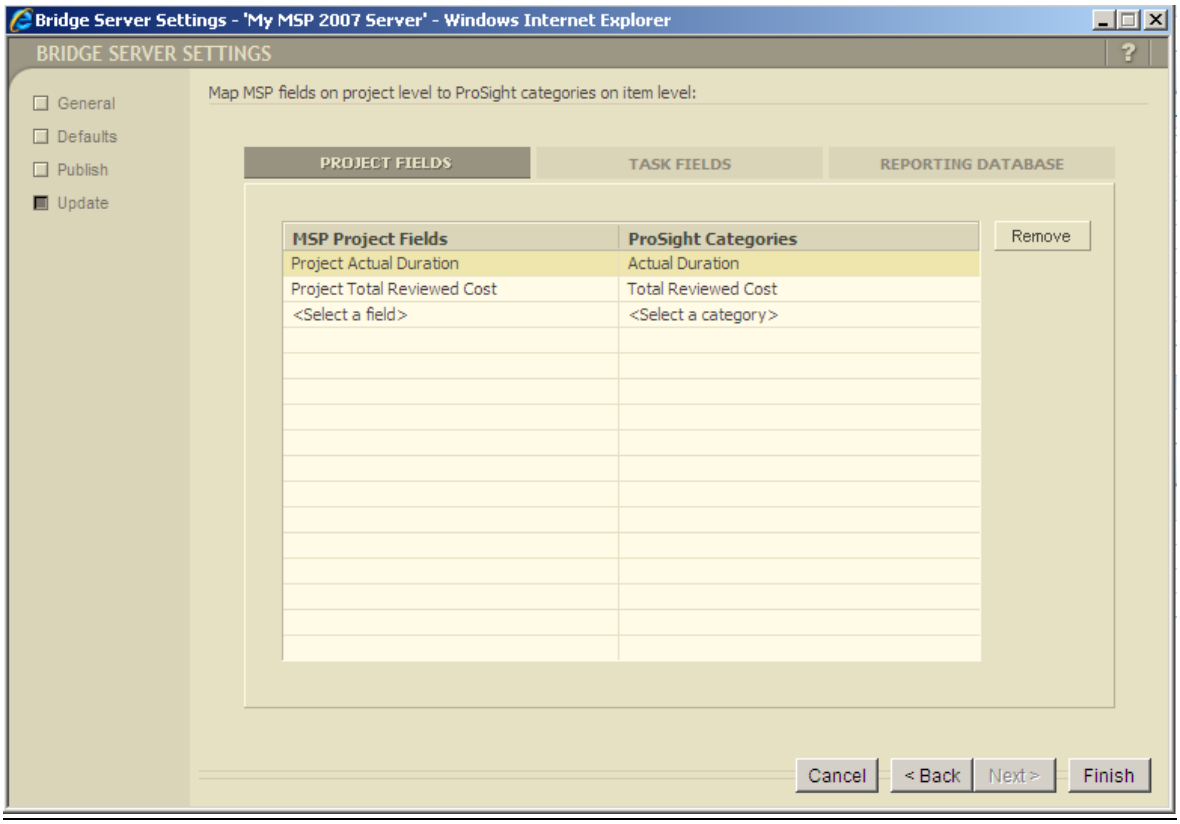
The *Update* step in the *Bridge Server Settings wizard* enables the administrator to set system-wide policies for mapping MSP project fields to Primavera Portfolio Management categories.

The Update step is divided into three sub-tabs:

- Project Fields
- Tasks Fields
- Reporting Database (project Server 2007) / OLAP Cube (project Server 2003)

Project Fields Tab

The *Project Fields* tab enables the administrator to share and map data from Enterprise Custom Project Fields in the *Project Information* dialog box in MS Project to categories in Primavera Portfolio Management.



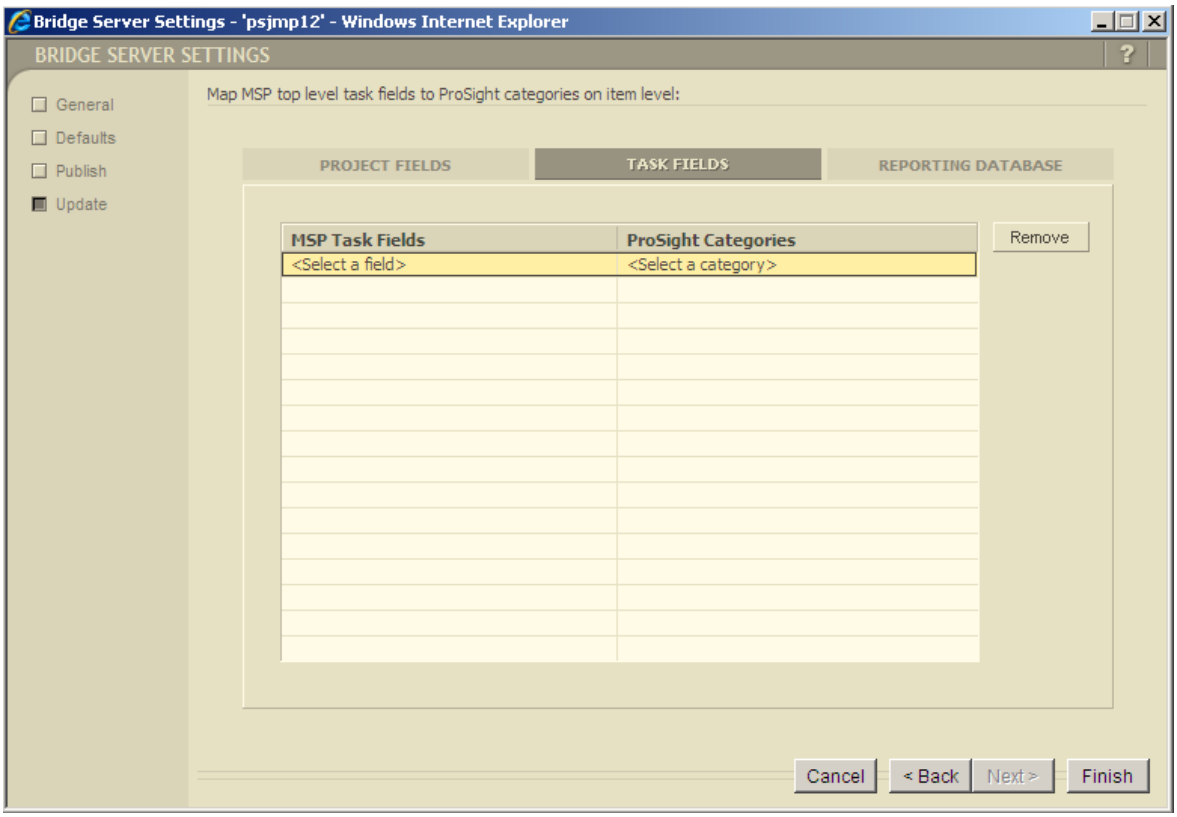
To map MSP Project Fields to Primavera Portfolio Management Categories:

1 On the *Project Fields* tab, select a field from the **MSP Project Fields** drop-down box.

2 Select a category from the **Primavera Portfolio Management Categories** tab tree.

Tasks Fields Tab

The *Task Fields* tab enables the administrator to map MSP project task field summary values to Primavera Portfolio Management categories.

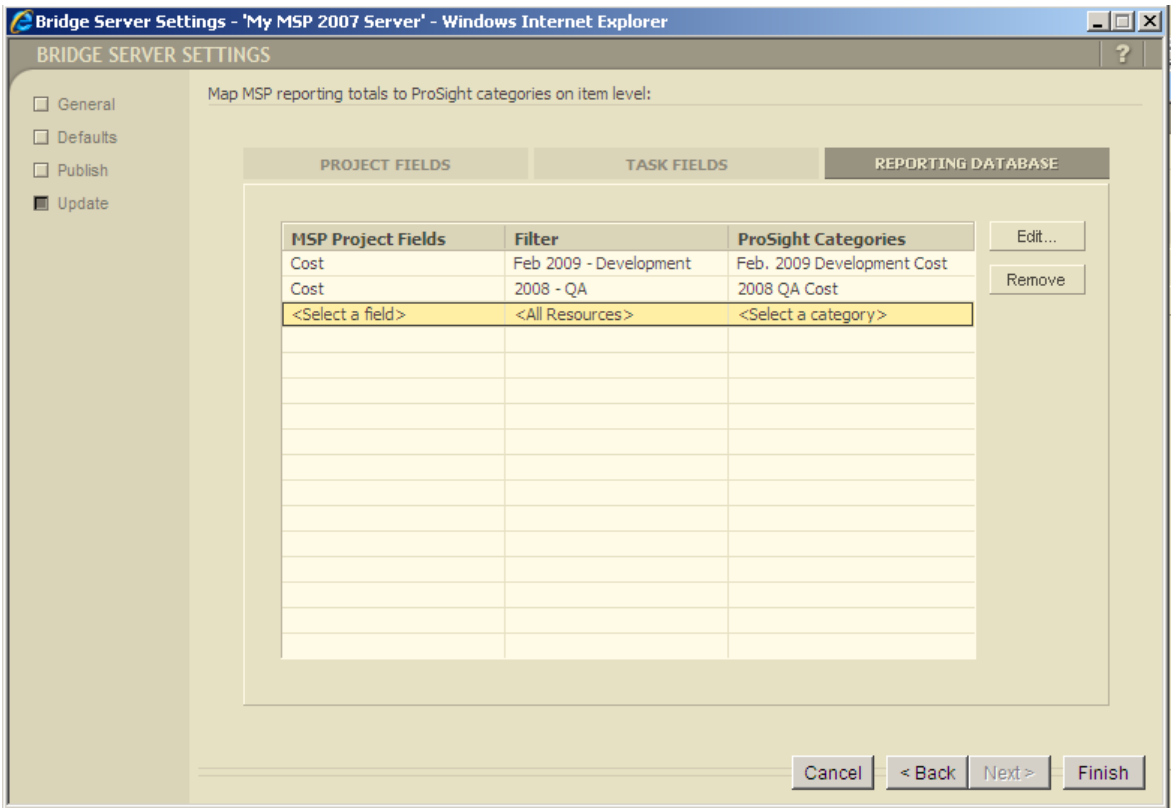


To map MSP Task Fields to Primavera Portfolio Management Categories:

1. On the *Task Fields* tab, select a field from the **MSP Task Fields** drop-down box.
2. Select a category from the **Primavera Portfolio Management Categories** tab tree.

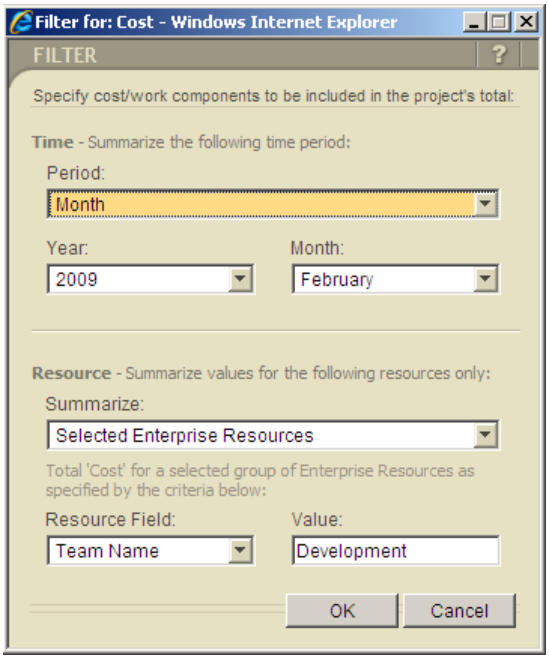
Reporting Database Tab (Project Server 2007)

The Project Server 2007 Reporting Database (RDB) allows cost and resource breakdown over time. The MSP Bridge for Project Server 2007 uses the RDB to access this information.



To map the Reporting Database fields:

1. On the *Reporting Database* tab, select an **MSP Project Field** such as Cost or Work.
2. Click on the corresponding **Filter** cell. The *Filter* window opens, displaying Time and Resource information for the selected field.



3 In the **Time** drop-down list, select 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 Cost field to two separate categories in Primavera Portfolio Management: e.g., Cost 2005 and Cost 2008.

4 In the **Resources** section, select the 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.
- **All Enterprise Resources** – Total cost or work of all Enterprise Resources for the project.
- **Selective Enterprise Resources** – Total cost or work for a selected group of Enterprise Resources, as specified by the **Field Name** and **Field Value**. In **Field Name**, you may select any MS Project Resource Field. In **Field Value**, enter the value by which the system will filter the selected resource field.

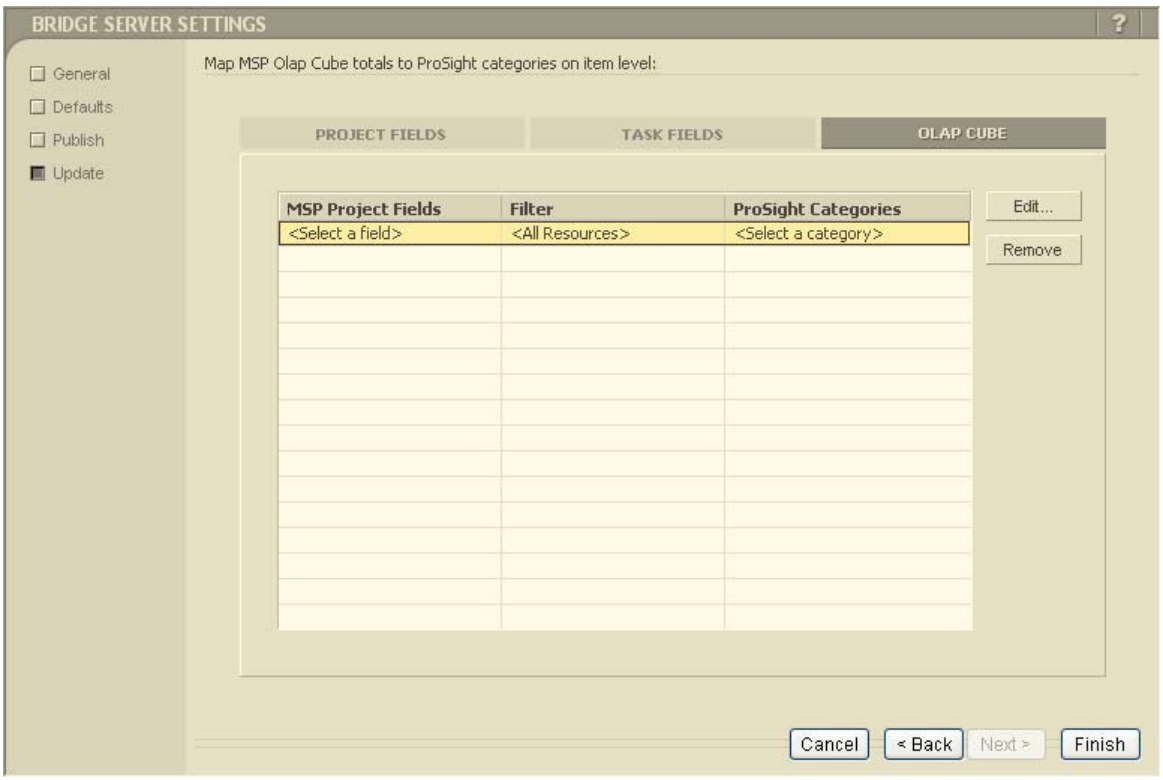
  For example, an administrator who wants to create a category called 'Programmers Cost' can create a Resource Custom Text Field in MS Project called 'Resource Skill Type'. Under this field, all skill types in the organization (such as programmers, DBAs, and MIS) are listed. The field name is specified in **Field Name** as described above, and 'Programmers' is entered under **Field Value**.
- **Local Resources** – Total cost or work of all local resources assigned to the project

- **Task Only Work** –Total cost or work for the project derived from tasks with no resources assigned to them
- **Project Fixed Cost** (for cost field only) – Total fixed costs for the project

5 Select the Primavera Portfolio Management Category to which the field should be mapped.

OLAP Cube Tab (Project Server 2003)

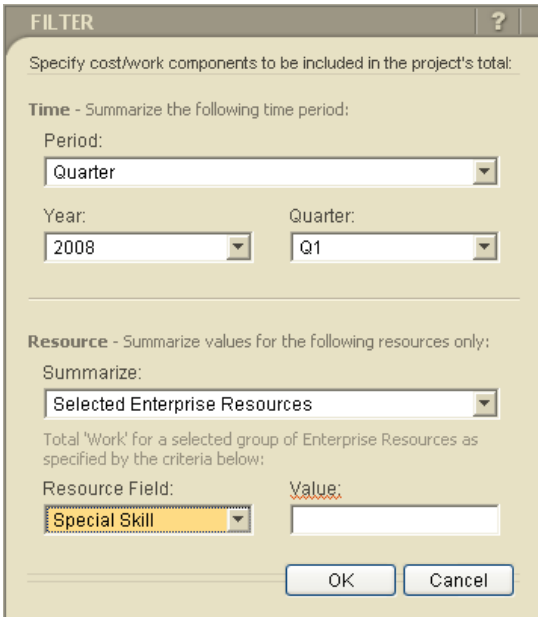
The OLAP Cube allows cost and resource breakdown over time. MSP Bridge for Project Server 2003 uses the OLAP Cube to access this information.



To map the OLAP Cube fields:

1 On the *OLAP Cube* tab, select an **MSP Project Field** such as Cost or Work.

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



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

- All
- Year – where the specific year must also be selected
- Quarter – where the specific year and quarter 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 Cost field to two separate categories in Primavera Portfolio Management: e.g., Cost 2005 and Cost 2008.

4 In the **Resources** section, select the 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.
- **All Enterprise Resources** – Total cost or work of all Enterprise Resources for the project.
- **Selective Enterprise Resources** – Total cost or work for a selected group of Enterprise Resources, as specified by the **Field Name** and **Field Value**. In **Field Name**, you may select any MS Project Resource Field. In **Field Value**, 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 Cost' can create a Resource Custom Text Field in MS Project called 'Resource Skill Type'. Under this field, all skill types in the organization (such as programmers, DBAs, and MIS) are listed. The field name is specified in **Field Name** as described above, and 'Programmers' is entered under **Field Value**.
- **Local Resources** – Total cost or work of all local resources assigned to the project
- **Task Only Work** –Total cost or work for the project derived from tasks with no resources assigned to them

- **Project Fixed Cost** (for cost field only) – Total fixed costs for the project

5 Select the Primavera Portfolio Management Category to which the field should be mapped.

Appendix 1: Elements and Data Transferred in the Primavera Portfolio Management Bridge for Microsoft Project

	Initial Publish (new item) (from Primavera Portfolio Management to MSP)	**Subsequent Publish (mapped item)** (from Primavera Portfolio Management to MSP)	**Update Item** (from MSP to Primavera Portfolio Management)
Basic Bridge (w/o Defaults)	**Item → Project Elements** 1. Item → Project (with same name as item[9]) 2. Phase (if exists) per phase → Summary task named after the phase[10] **Item → Project Data** 3. Item Start Date → Project *Start* field 4. Phase Start[11] & End Dates[12]		
Templates (w/o Defaults)	**Item → Project Elements** 1. Item → Project (named after the item[10], 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. Initial Phase Date references → Primavera Portfolio Management Phases summary task which includes per phase, a *Reference* summary task named after the phase[13] 4. Deliverable → Milestone named after the deliverable included under the summary task named after its respective phase **Item → Project Data** 5. Item Start & *End* Dates[14] 6. Initial Phase Start & *End* Date references[15] 7. Deliverable *Due date*[16] **Link to Primavera Portfolio Management** 8. Primavera Portfolio Management Workbook link[17]	**Item → Project Elements** 1. (New) Deliverable → (New) Milestone named after the deliverable included under the summary task named after its respective phase **Item → Project Data** 2. Item Start & End Dates[15] 3. New Deliverable *Due Date*[17] **Link to Primavera Portfolio Management** 4. Primavera Portfolio Management Workbook link[18]	**Project → Item Data** **MSP Summary Task Fields → Primavera Portfolio Management Phase Fields**[18] 1. Baseline[19] 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. % Complete → % Completed **MSP Milestone Fields → Primavera Portfolio Management Deliverable Fields**[20] 5. Start & Finish dates → Due Date 6. % Complete → Completed[21]

---

9 In MSP 2003 the project name is named after the item with the addition of the suffix ".Published'.

10 In MSP 2007 this summary task includes the <*Planned Phase Duration*> summary task which includes <*Planned Phase Start Date*> and <*Planned Phase End Date*> milestones. In MSP 2003 this summary task includes the <*Planned Phase Duration*> task.

11 Takes *Forecast* dates if they exist. Otherwise *Planned* dates if they exist. Otherwise today's date. Never takes Actual dates.

12 In MSP 2007 this data is mapped to the *Start* and *Finish* fields of the <*Planned Phase Start Date*>and *Planned Phase End Date*> milestones respectively. In MSP 2003 it is mapped to the <Planned Phase Duration> task Start and Finish fields

13 In MSP 2007 this summary task includes *Start Date Reference* and *End Date Reference* milestones each named after the phase. In MSP 2003, the Primavera Portfolio Management Phases summary task includes reference tasks named after each phase.

14 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.

15 In MSP 2007 the Start and End dates are mapped to the *Start* & *Finish* fields of *Start Date Reference* and *End Date Reference* milestones named after the phase, respectively. In MSP 2003 this data is mapped to the *Start* & *Finish* fields of a reference task named after the phase.

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

17 This data is mapped to an MSP Enterprise Custom Project field.

18 This assumes that the MSP summary task 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 summary tasks in MSP: Either by publishing the item together with its phases (Basic Bridge above), or by publishing an item based on an MSP template where the template contains summary tasks identical in name to those of the phases of the original item.

19 Unnumbered Baseline

20 This assumes that this MSP milestone is mapped to a Primavera Portfolio Management deliverable, which 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.

21 Only if the % Completed of the milestone = 100% will the deliverable's Completed field be checked.

Mappings	**Item → Project Data** 1. Primavera Portfolio Management Category → MSP Enterprise Custom Project Field	**Item → Project Data** 1. Primavera Portfolio Management Category → MSP Enterprise Custom Project Field	**Project → Item Data** 1. MSP Enterprise Custom Project Field → Primavera Portfolio Management Category 2. MSP Task Field → Primavera Portfolio Management Category 3. MSP Reporting Database/OLAP Cube Task Field → Primavera Portfolio Management Category