P6 EPPM to Primavera Cloud Migration Guide

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P6 EPPM to Primavera Cloud Migration Guide

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A Message to Our P6 Customers

Dear Oracle P6 Customers,

Transitioning to something new takes courage, it takes information that informs our alternatives, but most importantly, it takes a plan. No one P6 installation is the same, but that does not mean that the migration to Oracle Primavera Cloud should be hard. We understand the full scope of what this change means to your business and people. We are aware of the level of technical impact to your processes and the precision of change management required. We designed the P6 to Primavera Cloud Migration Utility Kit based on our experience and understanding of your needs. We want you to know that you are not alone on this journey. We are here to support you in every step of the way to ensure that you and your organization are successful in this transition.

P6 to Primavera Cloud A New Store Video (***https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6315311421112***)

The Migration Utility Kit includes the options, recommendations, and procedures you need to make your migration simple, efficient, and seamless. This kit is comprised of 3 key items:

- **Readiness Checklist**: The Readiness Checklist provides you and us at Oracle with a clear picture of your level of migration readiness.
- **Migration Overview**: The ***Migration Overview*** (***https://www.oracle.com/industries/construction-engineering/primavera-cloud-project-management/p6-migration-tour/***) provides a step-by-step visual overview of the migration process to assist you in selecting the appropriate migration package.
- **P6 EPPM to Primavera Cloud Migration Guide**: This guide provides information on the data that can be transferred using the different migration methods, describes the main differences in functionality and terminology between the products, and provides the best practices and recommendations related to data migration.

Along with the Migration Utility Kit, you will also have the support of our skilled migration team to keep you informed with the updates so you can prepare your organization. Once the migration is complete, you can rest assured knowing that your users will be efficiently trained to succeed with Primavera Cloud. We highly value your partnership and look forward to enhancing the built world, together.

Contact your sales representative if you would like to learn more about the migration process or discuss your data migration options from P6 to Primavera Cloud.

About this Guide

P6 Migration Journey Video

This guide explores the requirements, considerations, and best practices for moving your organization's project data from P6 EPPM to Oracle Primavera Cloud. The individuals responsible for migrating data between applications, such as the P6 and Primavera Cloud application administrators, should read this guide. Project and resource managers, other administrators, and additional stakeholders may also be interested in this guide because it discusses the organizational and functional differences between the two applications. The guide is organized into the following sections:

- **Navigation**: Oracle Primavera Cloud enables users to work with a variety of different objects, including projects, portfolios, and programs. Feature functionality for each object is broken down into related apps and pages. The Navigation section provides high-level overview of the application's user interface and where you can find the most common functionality.
- **Functional Differences**: Explore enhancements to object organization and management through the use of workspaces. Shared data, user security, and user privileges are configurable at each workspace level. Changes to administration, security profiles, resources and roles, costs, timesheets, and other functionality are also discussed.
- **Terminology Differences**: Many of the common project management concepts remain the same between P6 and Primavera Cloud, but the terminology of certain items may be different. If a P6 concept has a different name in Primavera Cloud, it will be included in this section.
- **Best Practices and Recommendations**: Workspaces, shared data, user security, and project information can be configured in a variety of ways depending on your existing setup and organizational preferences. This section provides best practices and recommendations for the overall configuration of your Primavera Cloud environment.
- **Migration Methods**: Primavera Cloud supports several methods for migrating your project data from P6. This includes importing your data using the XML or XER file format, integrating directly with the P6 application, integrating Primavera Cloud and P6 using the Primavera Gateway middleware application, using the Project Integration Framework (PIF) tool, which is managed entirely by Oracle Consulting Services, or using P6 EPPM Web Services and the Primavera Cloud API. This section provides links to the documentation necessary to migrate your data. Each link contains information on preparing your environment for migration and the steps required to do so. This section also lists the objects that are transferable using any of the migration methods, the objects that cannot be transferred but are still supported in Primavera Cloud, and the objects that cannot be transferred and are unsupported in Primavera Cloud.
- **Data Validation**: Follow these steps to ensure your data was successfully and accurately migrated to Primavera Cloud.

For More Information

- ***Migrating from P6 to Primavera Cloud Course on Oracle MyLearn*** (***https://mylearn.oracle.com/course/migrating-from-p6-to-primavera-cloud/112669***): Access the Migrating from P6 to Primavera Cloud course on Oracle MyLearn to learn about the functional differences between P6 and Primavera Cloud.
- ***Oracle Help Center for Primavera Cloud*** (***https://docs.oracle.com/cd/E80480_01/index.htm***): Access the full suite of documentation materials, learn where to access self-paced training content, and where to find additional customer support for Primavera Cloud.

- ***P6 EPPM User and Integration Documentation*** (***https://docs.oracle.com/en/industries/construction-engineering/primavera-p6-project/index.html***): View P6 EPPM user documentation by product version.
- ***Oracle Help Center for Construction and Engineering*** (***https://docs.oracle.com/en/industries/construction-engineering/index.html***): Access help documentation for any Construction and Engineering solution.

Navigation

Most of the work in Oracle Primavera Cloud will be performed in the context of an open object. This may be a workspace, project, portfolio, program, or idea. Each object features pages with functionality specific to that object and a Summary & Settings panel, where you can configure details, defaults, dictionaries, and object-level security.

Oracle Primavera Cloud enables you to manage the prioritization, planning, and execution of your data using an in-browser, cloud-based enterprise solution that supports the opening of workspaces, projects, portfolios, programs, and ideas. See ***The Primavera Cloud User Interface*** (on page 7) to learn more about the user interface and navigation details.

The Primavera Cloud User Interface

Although the location of objects and settings may differ from P6, they can still be easily found in Primavera Cloud. Consult the screenshot and table below for a general layout of the application and its most common features.

Select an object to open using the Object Selector at the top of the page. Each object type has its own set of apps, which group pages with similar functionality together. For example, the Schedule app can be found in the context of a project or program. Access apps, pages, and Summary & Settings using the sidebar navigation. You can control which apps users can access by configuring app presets. Administrators have additional access to the Global Admin app to configure companies, users, and application-wide settings.

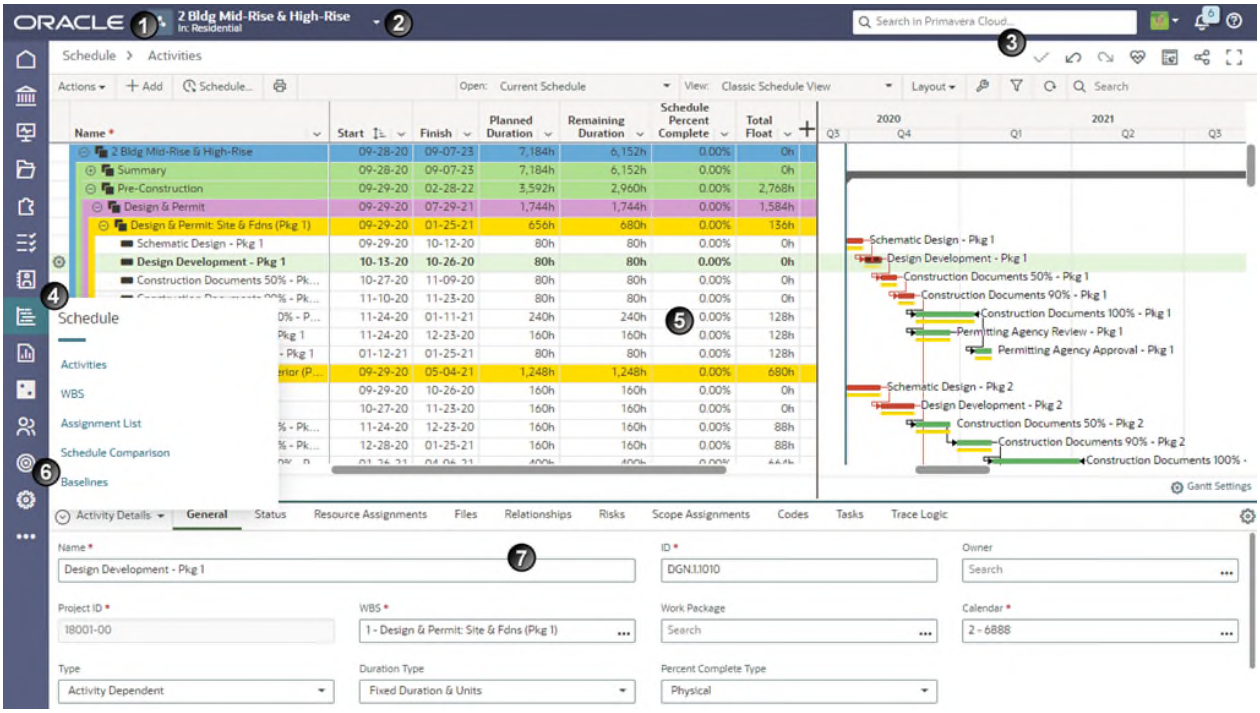

Table of Screen Highlights

Item	Description
1	**Get Started**: The Get Started page is every user's first view of Primavera Cloud. Select the Oracle logo from anywhere in the application to open it. You can watch a video about how the application works, get started by creating or accessing projects, and access additional resources such as the **Help** and the **Training Center**.
2	**Object Selector**: Use the object selector to open an object or access the inventory of all objects in the application. This can be projects, portfolios, programs, workspaces, or ideas. Only one object can be open at a time in a single browser tab, but you can have multiple objects open simultaneously by opening objects in different browser tabs or windows. Available objects are determined by a user's level of access. Users with the proper privileges can also use the **Global Admin** app to configure application-wide and administrative-level settings. You can also use the object selector to add new objects and access your recent and favorite objects.

Item	Description
3	Use the icons in the header of the application window to access a **global search**, the **User menu**, the **View notifications panel**, and the **Help**. Below the header are common icons that control functionality on the page. This includes save, undo and redo, run reports, share, and full screen.
4	**Sidebar** and **Page Selector**: The sidebar navigation contains links to apps dependent on the object context you are in such as a workspace, portfolio, or project. The order and number of apps displayed in the sidebar can be customized per user. Hover over a particular app to display its pages. Select a page to open it in the main window.
5	**Main Window**: This is where page-level actions are performed and where the most important page data is displayed. Depending on the page, the main window might show a table, Gantt chart, settings, graphic chart, planning board, or activity network. Pages can also contain toolbars, detail windows, and side panels.
6	**Summary & Settings**: Select the gear icon in the sidebar to view the Summary & Settings panel for the current object. This panel enables you to configure general settings, defaults, dictionaries, and security for the object, as well as settings for the object's parent workspace.
7	**Detail Windows**: Detail windows provide additional information about the objects selected in the main window. Some have corresponding pages that contain the same information. You can also use detail windows to establish initial object data.

Functional Differences

The following topics compare the major differences in functionality between common P6 concepts and their corresponding concepts in Primavera Cloud. Many of these concepts can be configured and implemented in a variety of ways depending on your organization's preferred setup. After reviewing the topics in this section, see ***Best Practices and Recommendations*** (on page 43) to learn more.

Note: The comparison between P6 and Primavera Cloud is based on the most recently released version of each P6 product. Some features may not be available for you if you are using an older version of the product.

Administration

Some features from P6 have been given new names in Primavera Cloud or are now configured in different locations. Consult the following table to see P6 administration features and their corresponding names and locations in Primavera Cloud. If a feature from P6 is not mentioned under Primavera Cloud, it is not supported.

Administration Features in P6	Administration Features in Primavera Cloud

Application Settings	▸ The following application settings from P6 are configured in the **Global Admin** app:
	  ▸ Consent Notice settings are configured on the **Privacy** page.
	  ▸ Primavera Gateway settings are configured on the **Integrations** page.
	  ▸ The Time Periods settings are configured on the **Application Settings** page.
	▸ Earned Value settings are configured per project, in the project settings.
	▸ Report settings are configured per report.

Enterprise Data	▸ Enterprise data is configured at individual workspace levels. To learn more about workspaces and how shared data is distributed in Primavera Cloud, see ***Data Organization*** (on page 11) and ***Shared Data*** (on page 13).
Scheduled Services	▸ The Scheduler and Leveler functions can be configured and run as recurring services on the **Manage Services** page.

User Administration	▸ User settings are configured on the following pages in the Global Admin app:
	  ▸ **Companies**
	  ▸ **License Usage**
	  ▸ **Permission Sets**
	  ▸ **Users**
	  ▸ **User Groups**
	▸ The Organizational Breakdown Structure (OBS) is not supported in Primavera Cloud.
	▸ Global security profiles and project security profiles from P6 are called permission sets in Primavera Cloud. Permission sets contain additional privileges and support additional object types. To learn more about how user administration, access, and permissions work in Primavera Cloud, see ***Security*** (on page 14).

User Interface Views	▸ User interface views are not supported in Primavera Cloud, but you can create different app preset profiles and assign them to individual users to control the apps to which they have access. You can also set a default preset to be applied to all new users. App presets are configured and applied on the **Users** page in the **Global Admin** app.

Data Organization

Using Workspaces in OPC For P6 Users Video

Projects in P6 are organized using a hierarchical method called the enterprise project structure (EPS). The EPS enables you to group projects according to your organization's preferred structure, such as by company division, phase, geography, or project size. P6 also supports managing related projects using portfolios. The process for grouping and organizing projects and other data objects in Primavera Cloud is performed using workspaces. Similar to the EPS, workspaces organize projects hierarchically according to the structure determined by your organization. The top level of the workspace hierarchy consists of the root, or Company, workspace. The root workspace has two child workspaces, Production and Non-Production, which can be renamed and repurposed to suit your needs. Each workspace, except the root workspace, can have additional child workspaces. See the ***Workspaces*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/88870.htm***) section of the *Primavera Cloud Help* for more information.

It is recommended that you plan your workspace hierarchy carefully as the structure cannot easily be reorganized after you begin to enter project data. If neeeded, Primavera Cloud allows users with the Move Workspace permission to move a workspace to another workspace. For more information, see ***Considerations When Moving a Workspace to a Different Workspace*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/255254.htm***) in *Primavera Cloud Help.*

A simple hierarchical structure will make it easier to manage and maintain shared data and user security. It is not recommended that you replicate your existing P6 EPS in Primavera Cloud. However, if needed, you can create a project code that represents your P6 EPS structure and group your projects for migration by this code rather than by the workspace. Workspaces offer functionality that the EPS does not, such as shared data capabilities, direct assignment of security privileges, and support for additional data objects. Review these concepts below:

- **Shared Data**: Workspaces are the primary tool for the distribution of shared data, which is managed at individual workspace levels and applied to the hierarchies of objects within that workspace. Shared data includes item dictionaries, object defaults, and object settings. See ***Shared Data*** (on page 13) for additional information.
- **Security**: User security is configured by administrators at the workspace levels where users should have access. Security consists of user and user group access to objects and sets of permissions conferred to each user. Additional security options can be configured for each of the supported objects listed below. See ***Security*** (on page 14) for additional information.
- **Supported Objects**: Workspaces are containers for a variety of subordinate objects, each with their own set of tools and functionality. Each of the following objects can be opened in the context of its owning workspace. Only one object can be opened at a time within a single browser tab, but you can have different objects open simultaneously by opening them in separate browser tabs or windows.
  - **Workspace**: Child workspaces are used to build out your organization's hierarchy of objects. All workspace levels support shared data, security, and object containment.
  - **Projects**: Perform a wide range of project management functionality. Only one project can be open at a time within a single browser window.
  - **Portfolios**: Develop and monitor related groups of projects, programs, and sub-portfolios. Use portfolios to monitor the health and status of a group of related projects. Perform multi-year budget and resource planning, track projects against metrics, and prioritize and evaluate projects for execution. The same project can belong to multiple portfolios.

- **Programs**: Programs include projects that are related and collectively contribute to the achievement of a program's outcomes and intended benefits. Manage multiple projects' data including costs, tasks, resources, risks, and schedules. The same project can belong to multiple programs.
- **Ideas**: Ideas are user-submitted goals or improvements that can be evaluated and turned into projects.

Shared Data

P6 to Primavera Cloud Creating and Sharing Data Video

Shared data prevents the need to re-enter data in multiple areas and ensures consistent standards across an organization. In P6, enterprise data is managed at the administrative level in a single location. Standardized categories and values are configured and applied across all objects in the application. In Primavera Cloud, shared data is configured at individual workspace levels. Data that belongs to a particular workspace can be automatically or manually pushed down to the child workspaces and other objects within the workspace hierarchy. This ensures that the right data is available at the appropriate level. Data required by all levels of the organization should be configured at the root workspace level, whereas data intended for a specific workspace branch should be configured at the highest appropriate level of that branch. If a shared data category ever needs to be available to more workspaces, you can set its owning workspace to a higher level in the workspace hierarchy. Main objects like projects, portfolios, and programs inherit the defaults set at the parent workspace level when they are created. You can modify these defaults at the individual object level without affecting the parent workspace's settings.

In P6, enterprise data consists of global data such as currencies, project data such as baseline types and project calendars, and object-level configuration data for activities, resources, risks, issues, and documents. Primavera Cloud offers many of the same options at each workspace level in the form of dictionaries and object defaults. Dictionaries are repositories of items owned by the workspace which can be used by child objects without having to create them for each object. Examples of dictionaries include baseline categories, calendars, currencies, locations, and units of measure. Object default settings specify the default configurations of each object created in the workspace branch. Depending on the object, you can configure auto numbering and calculation settings, customize standard field labels, create configured fields (called "user defined fields" in P6), add codes, and specify custom forms and workflow processes. Examples of objects you can configure include main objects like projects and portfolios, but also subordinate objects like activities, budgets, risks, tasks, and WBS.

User access functionality such as user groups and permissions is also treated as shared data. For example, permission sets can be defined at a particular workspace level and will apply to users and user groups within that hierarchy. This is explained in more detail in ***Security*** (on page 14).

See ***Terminology Differences*** (on page 42) for a list of P6 items that have been renamed in Primavera Cloud. See ***Transferable and Nontransferable Data*** (on page 51) for a list of P6 data that is not supported in Primavera Cloud.

Security

P6 to Primavera Cloud Managing Users and Security Video

Access to data in Primavera Cloud is determined by assigning users with appropriate privileges to the workspace level or object to which they should have access. While P6 requires users be assigned to organization breakdown structure (OBS) elements and OBS elements be assigned to each EPS node, project, and WBS, Primavera Cloud provides a more streamlined approach. Users are assigned directly to the workspace level to which they should have access, with that access automatically inherited by all child workspaces, projects, portfolios, programs, and ideas in that workspace branch. Access is also pushed down to the custom logs, files, and reports within the workspace branch. If access to only specific objects is required, a user can be assigned directly to those objects.

Permission Sets

While user assignment to objects controls access, it is the permission sets assigned to the user that determine the user's ability to perform certain functions such as add, edit, and delete on the objects to which they have access. Permission sets are collections of related security privileges. There are two types of permission sets in Primavera Cloud:

- **Global Permission Sets**: All users must be assigned a global permission set, which determines each user's access to application-wide settings and functions. This is configured when a user is added to the application. Global permission sets cannot be assigned to user groups.
- **Object Permission Sets**: Object permission sets are assigned to users when access to the corresponding object is granted. Users requiring access to workspaces, projects, portfolios, programs, ideas, custom logs, files, or reports must have an assigned object permission set for that object type. At the workspace level, a user can be assigned to all object permission sets. At the object level, only permission sets that are supported by that object can be configured. For example, when configuring project-level security for a user, only project, report, file, and custom log permission sets are supported, and only project permission sets are required. Object permission sets can also be assigned to user groups.

You can create as many different global and object permission sets as necessary for your organization. All permission sets contain two preconfigured options: Administrator (System) and View Only (System). The Administrator (System) permission set has all privileges assigned. The View Only (System) permission set provides read-only access to objects and their data. During user configuration, you can define the default permission sets that a user will have when assigned to a new object. These can be changed at each assignment level.

When a user is assigned to a workspace, they are granted access to the workspace and the objects within the workspace according to the permission sets given to the user. If a permission set for an object is not assigned at the parent workspace level, it can be assigned at a lower workspace level or directly to the corresponding object within the workspace. You can create varying levels of access within the hierarchy by assigning a user different permission sets at each level. For example, assign a user to a workspace with a View Only (System) workspace permission set to grant them read-only access to all child workspaces within the workspace. If there are two immediate child workspaces, you can assign the user Administrator (System) permissions to one workspace while the other workspace remains View Only (System). This basic concept can be applied to multiple levels of a workspace hierarchy as well as object permission sets at multiple levels. Additional recommendations are provided in ***Best Practices and Recommendations*** (on page 43).

User Groups

Primavera Cloud also supports bulk user security management through the implementation of user groups. User groups are collections of users that share similar responsibilities and are granted the same level of access to the objects to which the group is assigned. They are created at the workspace level and are automatically available to be assigned to the objects within the owning workspace's hierarchy. They can also be created at the project level and will only be available to be assigned to that project. A user group can be assigned to a workspace, project, portfolio, report, file, idea, custom log, or program. Access is only granted after the user group has been assigned to the workspace or child object. At the workspace level, assigning a user or group an object permission set will grant access to all instances of that object within the current workspace. Multiple user groups can be assigned to the same object. Just like individual users, object permission sets assigned to the group determine the users' level of access. Default permission sets can be defined for user groups and modified at each level where the group is assigned.

Users can be added to a user group at the workspace or project where they should have access. This can be before or after the user group has been assigned. As long as the user group has been given the proper object permission sets, the users that are added to a user group will gain access to those objects in the workspace that the user group is assigned to or if the user group is assigned directly to the object. A user can be part of multiple user groups, even if they are assigned to the same object. Permissions are additive, so users that belong to multiple user groups assigned to the same object will have access to that object with all permissions assigned by the user groups of which they are a member. You can create as many user groups as necessary to model the different user roles in your organization. For example, you might want to create separate user groups for executives, project managers, foreman, and tradespeople, each with a distinct set of permissions in accordance with their role.

Where Do I Configure User Security?

User security, including users, user groups, and their assigned permission sets, can be managed at the Global Admin, workspace, or project level. In Global Admin, users with the appropriate privileges can view and manage security for the objects that they have access to. At the workspace level, security is managed from the Summary & Settings pages. Project-level security is configured from the Project Team app in a project. At the workspace or project level, only user groups for that object and inherited user groups can be managed by administrators and by users with the User Groups privilege at that level.

Global and object permission sets can be configured at the Global Admin or workspace level. At the Global Admin level, administrators can select the owning workspace of each object permission set. Object permission sets are available to be assigned to users and user groups for objects within the owning workspace's hierarchy.

Privileges

This section maps each security profile privilege in P6 with its corresponding privilege in Primavera Cloud. This is not a comprehensive list of the privileges available in Primavera Cloud. Additional categories and privileges exist in Primavera Cloud for functionality not supported by P6. For more information on configuring and assigning user privileges in Primavera Cloud, see ***Security*** (on page 14). P6 privilege assignments cannot be transferred to Primavera Cloud.

Global and project security profiles in P6 correspond to several different privilege categories in Primavera Cloud. Most global security profile privileges from P6 are configured as workspace privileges in Primavera Cloud, although some can still be found in the global category. Most project security profile privileges from P6 correspond to project privileges in Primavera Cloud, although some object privileges like reports and files have their own sets of permissions.

In the tables below, each P6 privilege is mapped to a corresponding Primavera Cloud privilege when equivalent functionality exists between the two applications. If equivalent functionality does not exist, and there is an alternative in Primavera Cloud that best approximates the P6 functionality, the alternative and its applicable privileges is listed. If equivalent functionality does not exist, and there is no viable alternative, then the P6 functionality is not supported in Primavera Cloud. Some singular privileges that exist in P6 may be controlled by multiple privileges in Primavera Cloud.

Each Primavera Cloud privilege listed in the table uses the following format:

- Permission Set - Page section - Privilege

For example, the entry below indicates that the User Groups privilege can be found in the User Groups section of the Workspace permission sets.

- Workspace - User Groups section - User Group

Global Security Profiles

Administration

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Add/Edit/Delete OBS	OBS functionality is not supported in Primavera Cloud.	User Groups support assigning users with the same permissions to various data objects. They can be owned at the workspace or project level. Configure the following privileges for user groups: ▸ Workspace - User Groups section - User Groups ▸ Project - Project section - User Groups
Add/Edit/Delete Security Profiles	Workspace - Configuration section - Permission Sets	
Add/Edit/Delete Users	Global - Configuration section - User Administration	
Add/Edit/Delete User Interface Views	Global - Configuration section - User Administration	
Edit Application Settings	Global - Configuration section - Application Settings	
Provision Users from LDAP	This functionality is not supported in Primavera Cloud.	None

Add/Edit/Delete Categories (For Project Baseline Types)	This functionality is partially supported in Primavera Cloud.	Users with Workspace-level Add/Edit/Delete Baseline Categories privileges can create and modify baseline categories within their current workspaces and child workspaces. Baseline categories can also be imported using P6 XML Import if assigned to baselines and selected for import.

Codes

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Add Global Activity Codes	Workspace - Configuration section - Codes	
Edit Global Activity Codes	Workspace - Configuration section - Codes	
Delete Global Activity Codes	Workspace - Configuration section - Codes	
Add Global Issue Codes	Global issue codes are not supported in Primavera Cloud.	None
Edit Global Issue Codes	Global issue codes are not supported in Primavera Cloud.	None
Delete Global Issue Codes	Global issue codes are not supported in Primavera Cloud.	None
Add Project Codes	Workspace - Configuration section - Codes	
Edit Project Codes	Workspace - Configuration section - Codes	
Delete Project Codes	Workspace - Configuration section - Codes	

Add Resource Codes	Workspace - Configuration section - Codes	
Edit Resource Codes	Workspace - Configuration section - Codes	
Delete Resource Codes	Workspace - Configuration section - Codes	
Add Role Codes	Workspace - Configuration section - Codes	
Edit Role Codes	Workspace - Configuration section - Codes	
Delete Role Codes	Workspace - Configuration section - Codes	
Add/Delete Secure Codes	Secure codes are not supported in Primavera Cloud.	
Edit Secure Codes	Secure codes are not supported in Primavera Cloud.	
Assign Secure Codes	Secure codes are not supported in Primavera Cloud.	Edit Restricted Configured Fields Certain configured fields can be restricted, making them read-only for users without Edit Restricted Configured Fields permissions under Summary and Settings for a project workspace.
View Secure Codes	Secure codes are not supported in Primavera Cloud.	

Global Data

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Add/Edit/Delete Categories and Overhead Codes	Categories and overhead codes are not supported in Primavera Cloud.	Hour types enable users to categorize the types of hours they enter on timesheets. They are managed as part of the application's timesheet settings. Configure the following privileges for hour types: Global - Configuration section - Timesheet Settings
Add/Edit/Delete Cost Accounts	Workspace - Configuration section - CBS	
Add/Edit/Delete Currencies	Workspace - Configuration section - Currencies	
Add/Edit/Delete Locations	Workspace - Configuration section - Locations	
Add/Edit/Delete Financial Period Calendars	Workspace - Configuration section - Report Cycles	
Add/Edit/Delete Funding Sources	Workspace - General section - Funding Workspace - General section - Funding Costs/Financials	
Add/Edit/Delete Global Calendars	Workspace - Configuration section - Calendars **Note**: Calendars are available to their owning workspace and any workspaces they have been assigned to. To make a calendar available to all workspaces, create it in the root workspace.	

Add/Edit/Delete Global Portfolios	Workspace - General section - Portfolios Portfolio - Portfolio section - Portfolios **Note**: ▸ You can assign projects to a portfolio if they belong to the same workspace as the portfolio or a child workspace. To make any project available for assignment to a portfolio, create the portfolio in the root workspace. ▸ Projects may be assigned manually or by using a filter.	
Add/Edit/Delete Risk Categories, Matrices, and Thresholds	Risk categories are not supported in Primavera Cloud. Workspace - Configuration section - Risk Matrix Templates Workspace - Configuration section - Risk Threshold Templates	
Add/Edit/Delete Timesheet Period Dates	Global - Configuration section - Timesheet Settings	
Add/Edit/Delete User Defined Fields	Workspace - Configuration section - Configured Fields	
Add/Edit/Delete Stored Images **Note**:Stored images in P6 are used for printing layouts and reports.	Stored images are not supported in Primavera Cloud.	You can upload photos and associate them with workspaces, projects, and other objects. You must have Edit privileges for the object.

Resources

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Add Resources	Workspace - Configuration section - Resources Project - Resources section - Resources	
Edit Resources	Workspace - Configuration section - Resources Project - Resources section - Resources	
Delete Resources	Workspace - Configuration section - Resources Project - Resources section - Resources	
Add/Edit/Delete Resource Calendars	Workspace - Configuration section - Calendars	
Add/Edit/Delete Resource Curves	Workspace - Configuration section - Curve Profiles	
Add/Edit/Delete Roles	Workspace - Configuration section - Roles Project - Resources section - Roles	
Add/Edit/Delete Global Resource and Role Teams	Resource teams and role teams are not supported in Primavera Cloud.	None

Add/Edit/Delete Rate Types and Units of Measure	Price/Unit labels can be edited on the workspace Defaults & Options page for the Resource/Role object. This functionality is controlled by the following privilege: ▸ Workspace - Configuration section - Field Labels ▸ Workspace - Configuration section - Units of Measure	
View Resource and Role Costs/Financials	Workspace - Configuration section - Resource Costs/Financials Workspace - Configuration section - Role Costs/Financials Project - Resources section - Resource Costs/Financials Project - Resources section - Role Costs/Financials	
View Resource Role Proficiency	No privileges are required to view a resource's role proficiency.	
Approve Resource Timesheets	Global - Configuration section - Manage Timesheets	

Templates

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Add/Edit/Delete Activity Step Templates	Activity step templates are not supported in Primavera Cloud.	None

Add/Edit/Delete Issue Forms	Issue forms are not supported in Primavera Cloud.	None
Add/Edit/Delete Microsoft Project and Primavera Templates	Microsoft Project and Primavera templates are not supported in Primavera Cloud.	None
Add/Edit/Delete Project Templates	Workspace - General section - Project Template Project - Project section - Project	

Tools

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Administer Global External Applications	This functionality is not supported in Primavera Cloud.	None
Administer Global Scheduled Services	Global scheduled services are not supported in Primavera Cloud.	None

Administer Project Scheduled Services	All on demand and scheduled services are initiated at the object level. Application administrators can view all background services that all users have initiated. Users who are not application administrators can only view the background services they have initiated. Each background service has its own privilege. The P6 scheduled services supported in Primavera Cloud are controlled by the following privileges: • Project - Schedule section - Level • Project - Schedule section - Schedule	
Edit Global Change Definitions	Global change privileges are not configurable at the global or workspace level in Primavera Cloud.	Global changes are configured and run at the project level and are controlled by the following privileges: • Project - Project section - Global Change • Project - Project section - Global Change - Run
Import P6 Professional XER and MPX	P6 Professional MPX import functionality is not supported in Primavera Cloud.	None

Import XLS	Workspace - General section - Import Project Excel **Note**: In Primavera Cloud, importing a project from Excel only includes the project and its details. Project-level objects such as activities, relationships, resources, and resource assignments must be imported on the pages where they are created. This requires the individual privileges necessary to add those objects.	
Import XML	Workspace - General section - Import Project	
Enable Work Offline	Working offline is not supported in Primavera Cloud.	None

Views and Reports

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Add/Edit/Delete Global Activity and Assignment Layouts, Views and Filters	Global layouts are not supported in Primavera Cloud.	All views owned at the workspace level are controlled by the following privilege: Workspace - Configuration section - Views There are separate privileges for views owned at the project level.

Add/Edit/Delete Global Dashboards	Workspace - Configuration section - Workspace Dashboards	
Add/Edit/Delete Global Project, WBS, and Portfolio Layouts, Views and Filters	Global layouts are not supported in Primavera Cloud.	All views owned at the workspace level are controlled by the following privilege: • Workspace - Configuration section - Views There are separate privileges for views owned at the project level.
Add/Edit/Delete Global Reports	Global - Configuration section - Create and Run User Reports Reports - Report section - Workspace Report	
Edit Global Tracking Layouts	Tracking layouts are not supported in Primavera Cloud.	None
Edit Projects from Scorecards	This functionality is not supported in Primavera Cloud.	None
Add/Edit/Delete Global Visualizer Layouts	Visualizer functionality is not supported in Primavera Cloud.	None
Add/Edit/Delete Global Visualizer Filters	Visualizer functionality is not supported in Primavera Cloud.	None

Project Security Profiles

Activities

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Add/Edit Activities Except Relationships	Project - Schedule section - Activities	
Delete Activities	Project - Schedule section - Activities	
Add/Edit/Delete Activity Relationships	Project - Schedule section - Relationships	
Edit Activity ID	Project - Schedule section - Activities	
Add/Edit/Delete Expenses	Activity expenses are not supported in Primavera Cloud.	None
Delete Discussion Comments	Deleting discussion comments is not supported in Primavera Cloud.	None

Codes

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Add Project Activity Codes	Project - Project section - Codes	
Edit Project Activity Codes	Project - Project section - Codes	
Delete Project Activity Codes	Project - Project section - Codes	
Add EPS Activity Codes	Workspace - Configuration section - Codes	
Edit EPS Activity Codes	Workspace - Configuration section - Codes	
Delete EPS Activity Codes	Workspace - Configuration section - Codes	

EPS and Projects

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Add/Edit/Delete EPS Except Costs/Financials	Workspace - Configuration section - Workspaces	
Edit EPS Costs/Financials	Equivalent EPS cost and financial functionality is not supported in Primavera Cloud.	You can view a roll-up of resource assignment cost data on the Resource Assignments page at the workspace level, which is a partial alternative to the P6 functionality. The viewing of assignment costs at the workspace level is controlled by the following privileges: • Workspace - Configuration section - Resource Costs/Financials • Workspace - Configuration section - Role Costs/Financials
Add Projects	Workspace - General section - Project	
Delete Projects	Project - Project section - Project	

Edit Project Details Except Costs/Financials	Project - Project section - Project **Note**: Most project-level cost/financial data is controlled by the following privilege: • Project - Project section - Project Costs/Financials However, there are some project-level objects that have their own cost/financial privileges, including actuals, funds, resources, and roles. For a full breakdown of this privilege's details, including any interdependencies with other privileges, see ***Project Security Privileges Definitions*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/82318.htm***) in the *Primavera Cloud Help*.	
Add/Edit/Delete WBS Except Costs/Financials	Project - Project section - WBS	
Edit WBS Costs/Financials	Project - Project section - Project Costs/Financials	

View Project Costs/Financials	Project - Project section - Project Costs/Financials **Note**: Most project-level cost/financial data is controlled by the Project Costs/Financials privilege, but there are some project-level objects that have their own cost/financial privileges, including actuals, funds, resources, and roles. For a full breakdown of this privilege's details, including any interdependencies with other privileges, see ***Project Security Privileges Definitions*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/82318.htm***) in the *Primavera Cloud Help*.	
Delete Project Data with Timesheet Actuals	This functionality is not supported in Primavera Cloud.	None
Delete Published Project Data	Publishing is not supported in Primavera Cloud.	None
Export Project Data	Global - Configuration section - Download Excel Files Global - Configuration section - Export Projects	

Project Data

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Add/Edit/Delete Issues and Issue Thresholds	Issues are not supported in Primavera Cloud.	Custom Logs in Primavera Cloud can be used to create an Issues Log.

Add/Edit/Delete Project Baselines	Project - Project section - Baselines Project - Project section - Baselines - Edit Activity Data	
Add/Edit/Delete Project Calendars	Project - Project section - Calendars	
Add/Edit/Delete Risks	Project - Risk section - Risk	
Add/Edit/Delete Template Documents	Template documents are not supported in Primavera Cloud.	None
Add/Edit/Delete Work Products and Documents	Files - File section - Files	
Assign Project Baselines	Project - Project section - Baselines - Set Project Baselines	
Approve Timesheets as Project Manager	This functionality is not supported in Primavera Cloud.	Timesheets in Primavera Cloud can only be approved by users who have been assigned as a Timesheet Approver. Timesheet Approvers require the following privilege: ▸ Global - Configuration section - Manage Timesheets

Related Applications

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Administer Project External Applications	External applications are not supported in Primavera Cloud.	None

Exchange Project Data with Primavera Unifier	Direct integration functionality between Primavera Cloud and Primavera Unifier is not supported in Primavera Cloud.	Data can be exchanged between Primavera Cloud and Primavera Unifier using Primavera Gateway.
Exchange Project Data with Oracle Primavera Cloud	This functionality is not supported in Primavera Cloud.	None
Exchange Project Data with Gateway	The Application Administrator user type is required to configure integrations in Global Admin. Global synchronizations can be run by any user with access to a workspace with synchronizations. Project-level synchronizations can be run by users with the following privileges: ▸ Project - Project section - Project (Edit) ▸ Project - Project section - Project Integration	

Resource Assignments

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Add/Edit Activity Resource Requests	Resource requests are not supported in Primavera Cloud.	None
Edit Future Periods	Future period functionality is not supported in Primavera Cloud.	None
Edit Period Performance	Edit period performance is not supported in Primavera Cloud.	None

Tools

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Allow Integration with ERP System	Direct integration with an ERP system is not supported in Primavera Cloud.	ERP system data can be integrated with Primavera Cloud using the Oracle Primavera Cloud API or through Primavera Gateway.
Apply Actuals	Applying actuals to activities is not supported in Primavera Cloud.	None
Check In/Check Out Projects and Open Projects Exclusively	Checking projects in or out is not supported in Primavera Cloud.	None
Level Resources	Project - Schedule section - Level	
Schedule Projects	Project - Schedule section - Schedule	
Monitor Project Thresholds	Project - Project section - Alerts	
Store Period Performance	Project - Project section - Schedule	
Summarize Projects	Summarization is not supported in Primavera Cloud.	None
Edit Publication Priority	Publication is not supported in Primavera Cloud.	None
Run Baseline Update	The Update Baseline tool is not supported in Primavera Cloud.	Baselines can be opened and manually edited in the Activities view. The Get Activities feature can be used to update a baseline with new activities from the current schedule.
Run Global Change	Project - Project section - Global Change - Run	

Allow Integration with Primavera Unifier	This functionality is not supported in Primavera Cloud.	The Application Administrator user type is required to configure integrations in Global Admin. Global (Workspace-level) synchronizations can be run by any user with access to a workspace with synchronizations. Project-level synchronizations can be run by users with the following privileges: • Project - Project section - Project (Edit) • Project - Project section - Project Integration
Perform Global Search & Replace	Global search and replace is not supported in Primavera Cloud.	You can use the **Global Change** and **Find and Replace** tools to modify data on the Activities page. Global Change requires the following privileges: • Project - Project section - Global Change • Project - Project section - Global Change - Run • Project - Schedule section - Activities Find and Replace requires the following privileges: • Project - Schedule section - Activities

Views and Reports

P6 Privileges	Primavera Cloud Privileges	Alternative Functionality
Add/Edit Project Level Layouts	Project - Project section - Views	
Edit Project Reports	Report - Report section - Project Report	
Publish Project Website	Website publishing is not supported in Primavera Cloud.	None
Add/Edit/Delete Project Visualizer Layouts	Visualizer is not supported in Primavera Cloud.	None

Resources and Roles

Resource and role functionality in Primavera Cloud is very similar to that of P6. You can create roles to define the standard jobs and skills needed on your projects, and then associate those roles with specific resources. You can assign roles to activities and staff them with resources, or assign resources to activities directly. Perform usage analysis to review any allocation or staffing issues on your assignments, and then make adjustments accordingly. When you level a project in Primavera Cloud, you can level both resources and roles. In P6, only resources can be leveled. Leveling roles is useful in estimating role capacity and resolving overallocation. At the portfolio level, perform role demand and capacity planning when determining the projects in your portfolio suitable for execution. Both resources and roles support multiple rate and availability assignments, which you can use during project costing and portfolio demand planning. Resources can be associated with an application user to update their activity assignments using timesheets. Resource and role dictionaries support hierarchical configurations to match the structure of the organizations you will be working with. Resource and role teams are not supported by Primavera Cloud.

While the resource and role functionality between P6 and Primavera Cloud is similar, the configuration and implementation of resource and role dictionaries in Primavera Cloud is quite different. In P6, resource and roles are created at a global level and are available to be assigned to the projects within your organization. User access to resources and roles is controlled through user administration. In Primavera Cloud, resource and role dictionaries can be defined at the individual workspace and project levels. Resources and roles owned by a workspace are available to be assigned to the projects within that workspace, while resources and roles owned by a project are available only to that project. Users and user groups assigned to a workspace or project have access to that level's resources and roles.

Unlike shared data, resources and roles are not automatically made available to child workspaces. If a resource or role in a higher-level workspace should be made available to a child workspace or project, it must be assigned to that level. Project and workspace resources and roles can also be promoted to the parent workspace. This is useful when a project resource or role needs to be made available for assignment to other projects within the workspace or when a resource or role should be made available to a sibling workspace within the same hierarchy. You can promote resources and roles all the way up to the root workspace. Resources and roles can only be edited in the workspace or project where they are owned. Promoting resources and roles transfers their ownership to the parent workspace. Assigning resources and roles to lower levels does not affect their owning workspace. Different possibilities for structuring your resources and roles are explored in ***Best Practices and Recommendations*** (on page 43).

The assignment and analysis tools available to you in Primavera Cloud enable you to review usage for both workspace- and project-level resources and roles. You can also view all project assignments in the context of a program. When planning your resources and roles, you can define different price rates and availability limits and the periods when they will be in effect. Resources and roles inherited from a workspace can have separate availability periods defined at the workspace and individual project levels. This is useful to reflect the different levels of availability a resource or role might have across different assignments.

Any of the migration methods will transfer resources and roles to the workspace-level resource and role dictionaries. Transferred resources and roles that are assigned to project activities will be stored at the workspace level, made available to the project-level resource and role dictionaries, and assigned to the applicable activities within the project.

Costs

Cost functionality is supported across several areas of the Primavera Cloud application.

Schedule

Cost-loaded project schedules function very similarly between P6 and Primavera Cloud. Costs can be entered at the activity level or on individual resource and role assignments. Assignment-level costs roll up to corresponding activity fields, while activity level costs are distributed across activity assignments. Depending on your settings, cost values can be entered directly on cost fields or they can be calculated from corresponding unit fields. A variety of earned value metrics are available to track schedule and work performance.

Project Budget

Budget-related cost functionality in Primavera Cloud is similar to P6, but there are some new features in Primavera Cloud that do not exist in P6 and some P6 functionality that is not supported by Primavera Cloud.

The following table compares budget-related costing between the two applications:

Feature	P6	Primavera Cloud
Actuals	Run *Apply Actuals* to update the schedule based on approved timesheet actuals or manually entered actuals, or set up **Auto Compute Actuals**. Actuals are integrated with your schedule in that you can schedule activities that have the **Auto Compute Actuals** option set.	Track pending and confirmed spending for work delivered on a project. You can manually enter actuals or roll them up from scope assignment and scope item costs. Budget-related actuals cannot be integrated with the project schedule, but actual units and costs are supported for resource and role assignments on project activities.
Budget	P6 uses a top-down approach to budgeting by setting high-level estimates at the EPS level and then distributing budget amounts to projects within each EPS. You can track budget changes as they occur, use the budget log to record monthly, quarterly, and yearly spending of budgeted funds, track the current and undistributed variance amounts, and aggregate the monthly spending plan of each project in a branch to its higher EPS nodes.	Primavera Cloud supports both top-down and bottom-up budgeting model. In the bottom-up model, the budget estimates are manually entered at the project level; whereas, in the top-down model, the budget estimates are defined at the portfolio level and distributed down to the program and project level. A scope-based budget can also be created by rolling up costs from scope assignments and scope items. Create and track changes to the budget over time.
Cash Flow	Cash Flow functionality is not supported in P6.	Plan and manage high-level costs associated with your projects, collaborate with various stakeholders on budget allocations, and take snapshots of data to review progress over time. **Note**: Schedule data does not drive the cash flow.

Cost Accounts	Monitor project expenses, activity costs, and earned value throughout the project life cycle. Assign default or created cost accounts to any project. Cost accounts are established in a hierarchy at the Enterprise level. For example, if you created a cost account for a project component such as hardware, you would create other cost accounts beneath this component to show its parts such as coding and installation.	In Primavera Cloud, a cost breakdown structure (CBS) is used to track, manage, and report costs related to a project or program. The CBS standardizes costs into categories. CBS is comprised of cost codes - expense, capital, or none. It can be created at the workspace, project, or program level. The CBS can be optionally pulled down from a parent workspace into child workspaces and projects. CBS functionality is used on the project **Cost Sheet**. At the workspace level, a **Summary Cost Sheet** rolls up and summarizes costs and hours of all projects or child workspaces within the workspace. **Note**: Schedule costs do not roll up to the cost sheet.
Expenses	Expenses are non-resource costs associated with a project. They are assigned to activities and typically represent one-time expenditures for non-reusable items. Examples includes facilities, travel, consulting, and training.	Expense functionality is not supported in Primavera Cloud. Project actuals can be used to track expenses, although they are not integrated with activities. Activity configured fields (UDFs) may be used to track activity expenses.

Funding	Created at the global level, funding sources are the agencies, businesses, or groups that provide funding for a project. You can maintain a hierarchical list of funding sources and then assign specific funding sources to a project or to EPS elements as they develop. You can assign the same funding source multiple times with varying amounts and share contributions for different levels of the EPS.	Created at the workspace level, you can manage workspace-level funds and allocate portions of the funds to projects, portfolios, programs, and child workspaces. You can also create funds at the project, portfolio, and program levels for funds specific to those objects. Funds can be consumed by project actuals.

Portfolio Budgets

Primavera Cloud also supports budget planning at the portfolio level. Create what-if budget scenarios, select projects for execution manually or using automated tools, and then send budget proposals for review and approval.

Codes

Primavera Cloud offers a more simplified approach to codes than P6. In Primavera Cloud, codes are configured at the owning workspace level and are available to be assigned to objects within the owning workspace's branch. Create codes as high in the workspace hierarchy as possible so that they are available to be assigned to the objects where they are needed. If code availability should be limited to a smaller number of objects, create them in a lower-level workspace. The owning workspace of any code can be changed to a higher workspace level. Additionally, project-specific activity codes can be created at the project level to apply only to activities within that project. This is useful if only one project will be using certain codes or if you want to prevent the usage of certain codes by other workspaces or projects. If you are using import and export to share a project with other companies, project-specific codes will remain with the project and not become integrated with a company's workspace-level code dictionaries.

Codes can be assigned to a wide selection of objects in Primavera Cloud, including the project, activity, resource, and role objects supported by P6. In the owning workspace, you can choose the object types you want each code to apply to. Depending on how you use codes, a single code could be available to be assigned to every object type in Primavera Cloud, a limited number of objects types, or a single type, such as activities. The combination of workspace availability and specified object support forms the basic foundation of all codes in Primavera Cloud.

Secure codes and issue codes are not supported by Primavera Cloud. Primavera Cloud does support restricted configured fields which are similar to secure codes in that restricted configured fields prevent users from editing the restricted fields if they do not have Edit Restricted Configured Fields privileges for a project at a workspace level. The ability to add, edit, and delete codes at the workspace level is controlled by a workspace-level privilege and at the project level by a project-level privilege.

Timesheets

P6 and Primavera Cloud both enable users to enter hours worked against activities assigned to them through the use of timesheets. In a typical timesheet workflow, users update their timesheets for the specific timesheet period and submit them for approval. Submitted timesheets are processed, reviewed, and then approved by designated stakeholders with approval privileges. Approved timesheet hours can be used to update the actual hours on activities to which the user is assigned as a resource.

While the basic timesheet functionality is the same between P6 and Primavera Cloud, there are a few differences that you should be aware of:

- In P6, timesheet periods can be generated in intervals of weekly, every two weeks, every four weeks, or every month. In Primavera Cloud, timesheets can only be created in weekly intervals.
- In P6, a timesheet approval manager or delegate is responsible for approving or rejecting submitted timesheets. Several options are available to customize the levels of approval required, from no approvals required to two approval levels. In Primavera Cloud, timesheet supervisors and timesheet approvers both have the ability to create, modify, and submit their own timesheets or timesheets on behalf of other users. Timesheet approvers have the additional ability to approve or reject submitted timesheets.
- P6 supports the use of overhead codes, which provide timesheet users a method to categorize the types of hours they enter, such as vacation, holiday, sick time, or personal time. This concept is supported in Primavera Cloud through the use of hour types, which are managed as part of the application's timesheet settings rather than enterprise data.

While timesheet functionality in P6 requires the addition of the P6 Team Member Web service, timesheets in Primavera Cloud do not require any additional modules to be installed, and all functionality can be performed from within the application.

For more information on timesheet management functionality in Primavera Cloud, see the ***Timesheets User Guide*** (***https://docs.oracle.com/cd/E80480_01/English/user_guides/timesheets_user_guide/index.html***).

Terminology Differences

Although Primavera Cloud supports much of the same functionality as P6, some of the terminology may have been updated. The table below lists any objects, field names, or concepts from P6 that have been renamed for Primavera Cloud, including Primavera Cloud items that are not functionally equivalent but best approximate the P6 functionality. Items specific to P6 EPPM or P6 Professional are noted.

Name in P6	Name in Oracle Primavera Cloud
Add WBS from Template	Add WBS from Project
Admin Superuser Global Security Profile	Application Administrator User Type
Assign Baselines	Manage Baselines and Set User Baseline Preferences
Baseline Types	Baseline Categories
Check Schedule	Schedule Health
Disable Auto-Reorganization (P6 and P6 Professional)	Auto-Reorganize
Enterprise Project Structure (EPS)	Workspaces
Financial Periods	Reporting Cycles
Layouts (P6 Professional)	Views
Limit line	Max Availability line
Maintain Baselines	Manage Baselines
Overhead Codes	Hour Types
Recalculate Assignment Costs	Recalculate Costs
Merge Reflection Projects (P6 Professional)	Merge Mode in Schedule Comparison
Resource Curves	Curve Profiles
Security Profiles	Permission Sets
Task Dependent activity type	Activity Dependent activity type
User Defined Fields (UDFs)	Configured Fields

Secure Codes	Restricted Configured Fields
Work Products and Documents	Files

Best Practices and Recommendations

Depending on the organization of your data and user security, you may have specific requirements for configuring your Primavera Cloud environment. This topic provides a variety of best practices and recommendations for setting up the Primavera Cloud data described in the ***Functional Differences*** (on page 9) section. It does not cover the full configuration process. For that information, see *Oracle Primavera Cloud Help* (*https://docs.oracle.com/cd/E80480_01/help/en/user/index.html*).

The information below is divided into three main categories: **When**, **Where**, and **How**. Most objects in Primavera Cloud can be configured at any time, at any workspace level, and in the manner preferred by your organization. However, it may be easier or more beneficial to configure some objects in the beginning of your setup, in a specific location, or in a specific manner. The three categories are presented as common questions you should consider when configuring your data. Responses to each question are grouped by the type of data.

When should I configure my data?

- **Administration**: Administrative-level data such as application settings, companies, users, user groups, and integrations can be configured at any time. You should create all necessary global permission sets before adding users so that they are available to be assigned to new users.
- **Workspaces**: You should set up your workspace hierarchy before manually entering or migrating your data so that the data can be placed at the appropriate workspace level. As time goes on, you may need to add new workspace branches and levels to your hierarchy. A new workspace cannot be placed between two existing workspaces. If you believe you may one day need to add a workspace level between existing workspaces, you should add a placeholder workspace that can be used later.
- **Shared Data**: Most shared data can be configured at any time. However, after shared data is assigned to an object, you will not be able to delete it. You must delete any shared data assignments before you can delete the shared data.
- **Security**: User security can be configured at any time. Permission sets and workspace user groups are automatically available to child workspaces and projects, even if the workspace or project is created later. Individual users and user groups do not receive access until they are assigned to a workspace or project.

- **Projects**: Ensure that the workspace hierarchy is adequately built before adding projects to the appropriate workspace. Projects can be manually created or imported at any time. Users with appropriate privileges can move a project from one workspace to another, if required. Moving a project to a different workspace can affect shared data. Some inherited shared data may have to be promoted to the designated workspace before you can move the project. Project-level data can be configured at any time, although there are a few requirements. To migrate project data using integration, the source project in P6 and the destination project in Primavera Cloud must have the same project ID, and the project in P6 must be associated with the correct workspace location from Primavera Cloud. You cannot change the project currency after costs are created in the project.

Where should I configure my data?

- **Administration**: Administrative-level data is configured in the Global Admin app. User groups can be managed in the Global Admin app or at the workspace and project levels. Object permission sets can be managed in the Global Admin app or at the workspace level.
- **Workspaces**: The root, or Company, workspace contains two child workspaces, Production and Non-Production. All other workspaces must be children of Production and Non-Production. Workspace-level configuration data consists of shared data and user security. Both of these are discussed below.
- **Shared Data**: Dictionaries and object defaults should be added at the workspace level where the data needs to be available. All shared data objects have a Sharing Method setting. Shared data set to Automatic will be automatically pushed down to child workspaces. Data that does not need to be automatically pushed down to child workspaces should use the default Manual sharing method. You can later assign manually shared data objects in the child workspaces that need them. Data that is required for the entire organization should be created in the root workspace and use an Automatic sharing method so it is pushed down to all child workspaces. Data only needed by specific branches of the workspace hierarchy or individual workspaces should be created at that particular workspace level. If you are using a placeholder workspace, shared data set to Automatic will be automatically pushed down into the placeholder's child workspaces.

  Shared data owned at a higher level reduces the number of places where data needs to be maintained, including renaming, modifying, and deleting. Changes to shared data can only be made in the owning workspace. Changes are automatically pushed down to lower-level workspaces, regardless of the Sharing Method setting. However, higher-level ownership may reduce the specificity of shared data so that it can be used by as many objects as possible. For example, codes owned at a higher level might need to have more generic names and values so they can be available for assignment to a variety of objects. Codes owned at a lower lever can be more specific to the workspaces and projects where they are available, such as a particular industry or departmental workspace or a particular project. Lower-level data ownership may increase an administrator's maintenance responsibilities and lead to an abundance of shared data that is too specific. Consider maintaining shared data that is broader in scope and more applicable to a large section of your hierarchy in higher-level workspaces and shared data that is narrower in scope and specific to a particular section of your hierarchy in lower-level workspaces. If a shared data object should be made available to more workspaces and projects, you can change its ownership to a higher-level workspace. You cannot change an object's owning workspace to a lower level.

- **Security**: It is recommended that workspace user groups and permission sets are created as high in the workspace hierarchy as possible so that they are available to be assigned in all child workspaces and their projects. User groups must be assigned to a particular workspace or project to grant users in the group access to that object. Users should be assigned, directly or to user groups, at the workspace or project where they should gain access. Permission sets that need to be available to more workspaces can be moved to a higher owning workspace. User group ownership cannot be moved.
- **Resources/Roles**: As with shared data, the ownership of resources and roles should be determined by their required availability and areas of applicability. Resource and role ownership in a higher-level workspace dictionary is recommended for resources and roles that will frequently be used and monitored across multiple workspaces and projects, such as high-level managers, placeholder roles, equipment, and materials. However, resources or roles available to too many workspaces or projects could become overallocated, assigned to projects that are inaccessible, or assigned to projects that are inapplicable. For example, a resource may be assigned to more projects than they can realistically work, projects that are outside of their geographic location, or projects that are not related to their area of expertise. To avoid these types of issues, consider constraining the ownership of resources and roles to the lowest workspace level possible. Lower-level ownership ensures resources and roles are more applicable to the workspace where they are located. Consider creating project-level resources and roles if there are people or roles hired for work on a specific project that should not be available for assignment to other projects. However, this approach can lead to more maintenance and resources or roles that are not available to enough areas. If resources and roles should be made more available, you can promote them to a higher-level workspace dictionary. Promoting a resource or role changes its ownership. You cannot move resource or role ownership to a lower level.

  If you do not see a particular resource or role at the level you expect, there could be a few reasons. When assigning resources or roles in a higher level to a workspace or project dictionary, you can only choose from resources or roles that are available in the parent workspace. You must assign your desired resource or role to the parent level before you can assign it to your current workspace or project. If a resource or role is at a lower level, promote it to the workspace where it is required. If you are trying to assign a resource or role to an activity, you can only choose from resources or roles that are available in the project dictionary or parent workspace dictionary. If a workspace resource has not been assigned to the project level, assigning it to an activity will make it and any associated roles available at the project level.
- **Projects**: Projects should be added under the appropriate workspace determined by the hierarchical structure. Projects inherit various object defaults and auto numbering settings from the parent workspace, but these settings can be modified per project.

How should I configure my data?

- **Administration**: Configure application settings, companies, and users in the manner preferred by your organization. It is recommended that you assign the Application Administrator user type sparingly, as this provides full access to all application data.

- **Workspaces**: Create a workspace hierarchy that best represents your preferred organization of projects, shared data, and user security. It is recommended that you plan your hierarchy carefully and keep it as simple as possible. This will make it easier to add and maintain your data at the appropriate workspace levels. It is not recommended that you reproduce the Enterprise Project Structure (EPS) from your P6 environment. You may want to structure your workspace hierarchy based on geographic locations, industries, or departments. Choose a model that makes sense for your organization and the projects you will be working on. Consider how shared data and security will be organized in the hierarchy. Some organizations might find it beneficial to organize the workspace hierarchy based on security access. Since security and permissions can be defined at the workspace level, users who require the same security access should be added to the same workspace. If users from different departments in your organization require the same access to projects, then you should create the workspace hierarchy based on security needs instead of department or industry.

  The Non-Production workspace can be used as a test area before transferring data to Production. This enables you to test different configurations of data to determine which best suits your needs. For example, use Non-Production to test the migration of data from P6 to Primavera Cloud. As sibling workspaces, shared data in Non-Production does not affect shared data in Production. If you do not need a test area in the application, you can rename and repurpose the Production and Non-Production workspace.
- **Shared Data**: The configuration of shared data is mainly dependent on the level of the hierarchy where the data should be available. If certain shared data only applies to specific industries or departments, it should be owned at a workspace level that does not include other industries or departments. If there are currencies, locations, or units of measure that are location-dependent, you may want them owned at a specific geographic workspace level. Remember to set each shared data object's Sharing Method based on whether it should be automatically shared down the workspace hierarchy or manually assigned to specific child workspaces. Proper shared data ownership ensures shared data is only available at the appropriate workspace levels.
- **Security**: It is quicker and more efficient to set up user groups rather than assign users individually, especially if your organization uses the same job roles across projects. When planning user groups, think about the types of users who will all require the same level of access. This might be separate user groups for project managers, schedulers, superintendents, or field workers. Place them at the level of the workspace hierarchy where they should be available. One best practice is to add empty user groups to the root workspace with the permission sets that each group's users will require. Assign the user groups to the workspaces and projects where users will need access, and then add to the group only the users who will be working in that particular workspace or project. This way, all users in a user group will have the same permissions for an object type, but their access is restricted to the specific objects to which they were assigned. A user's assigned permissions are combined, so if a user requires additional privileges not granted by their user group, you can assign the user to the same object that the group is assigned to with the additional privileges they require. You could also add them to another user group that is assigned to the object and offers the required privileges. When planning permissions, consider creating object permission sets that are specific to different user groups. For example, a user group of managers should have privileges to add and delete data while a user group of field workers might only need privileges to add and edit data.

- **Resources/Roles**: If your workspace hierarchy is organized by geographic location, ensure that the resources or roles available in a particular workspace can be physically present to perform their work. If the hierarchy is organized by industry, consider keeping one industry's roles, such as aviation engineers, separate from another industry's roles, such as nuclear engineers. If there are roles that should be available to both industries, create or promote them to a workspace level that will encompass both. Create resources and roles at the project level if they will only work on that project. Associated resources and roles must be owned by the same workspace. Promoting a resource to the parent workspace will automatically promote its associated roles. Before promoting, ensure all of the associated resources and roles should be owned at the higher level.
- **Projects**: Projects should be created to achieve a specific objective. They should be organized according to the structure of your workspace hierarchy. Project-level data is specific to each project, so how you configure the data depends on the project's budget, scope, and timeline.

Migration Methods

Primavera Cloud supports various methods for migrating your data from P6. These include:

- Import
  - P6 XML or XER Import
- Integration
  - Direct Integration with P6
  - Integration using Primavera Gateway
- Project Integration Framework (PIF)
- P6 Web Services and Primavera Cloud API

All migration methods are described below. Review their use cases to decide which will work best for you. Use the links provided to access the documentation material for each method.

Each of the migration methods listed below supports the transfer of a different set of data from P6 to Primavera Cloud. Depending on the data you want to migrate, certain methods might be better suited to meet your needs. For more information on the data objects that are supported by each method, see ***Transferable and Nontransferable Data*** (on page 51).

Import

Importing is a manual, one-way movement of projects and project data from an external file to a specific Primavera Cloud workspace. You can use P6 XML or XER import method to migrate your data from P6 to Primavera Cloud:

- **P6 XML or XER Import**: You can import projects and project data using P6 XML or XER fomats. First, prepare your data for export from your P6 application. Multiple projects can be included in the XML or XER export file. After the XML or XER file is created, you can import it into Primavera Cloud and choose which projects to add, update, or ignore. If existing project data will be affected, you can decide which objects should be updated, kept the same, or ignored.

The import method is performed from within Primavera Cloud. This method requires the least amount of setup, but must be manually run each time. It cannot be scheduled. Import only brings in data that is associated with the projects in the file. It cannot transfer full object dictionaries.

The *P6 EPPM and P6 Professional Import Guide* (*https://docs.oracle.com/cd/E80480_01/193851.htm*) covers all of the steps in the P6 XML or XER import process, including how to prepare your P6 environment for export, prepare your Primavera Cloud application for import, and validate your data after the import is complete.

Integration

Integration is a bi-directional movement of data between P6 and Primavera Cloud. During integration, business objects and their data fields are transferred between applications. Field mapping templates list the objects and fields to be transferred and how they should be mapped from fields in the source application to fields in the destination application. A business flow is a specific set of field mapping templates and parameters that fulfill a particular data requirement. A single business flow might define the transfer of all resources, project activities, or project risks from P6 to Primavera Cloud or from Primavera Cloud to P6. The data contained in a business flow is transferred by adding the business flow to a synchronization job, specifying its parameters, and then running the synchronization. You can run synchronizations on demand or schedule them to run at regular intervals.

You can use integration to migrate a select number of dictionaries from P6 to Primavera Cloud, including calendars, resources, and roles. You can also migrate project-level data from a P6 project to a corresponding project in Primavera Cloud.

There are two integration methods that you can use to migrate your data from P6 to Primavera Cloud:

- **Direct Integration with P6**: The direct integration method requires minimal configuration to set up and provides default business flows and synchronizations to support the most common data migration requirements. Use this method if your organization does not require additional customization. Direct integration is performed from within Primavera Cloud.

  Establish a direct connection between your chosen Primavera Cloud and P6 deployments. Multiple connections can be made if you want to integrate with different P6 deployments. Each connection must contain at least one workspace to which the P6 data will be transferred. The default business flows are automatically available to the connected workspaces and the projects within the workspace. You can add your own field mappings, codes, UDFs, and notes to the provided business flows, but you cannot modify existing mappings. You cannot add or delete business flows or synchronizations using this method. If you require a more customized setup, you should use the **Integration using Primavera Gateway** method.

The ***P6 EPPM Integration*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/139418.htm***) section of the *Primavera Cloud Help* explains how to ***add a connection from Primavera Cloud to P6*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/139058.htm***), ***modify integration settings*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/139400.htm***), and ***modify the default business flows.*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/139399.htm***) When you are ready to migrate data, follow the steps to ***run synchronizations at the workspace*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/247068.htm***) or ***project levels*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/139499.htm***). You can monitor the status of synchronization jobs and view their business flow details.

> **Note**: You can use the Migrate Project Data from P6 to Primavera Cloud business flow if you want to bulk-migrate project data from P6 to Primavera Cloud. For more information on using this business flow, refer to the ***Modify the Migrate Project Data from P6 to Primavera Cloud Business Flow*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/247410.htm***) topic of *Oracle Primavera Cloud Help*.

- **Integration using Primavera Gateway**: Use this method if your organization requires customized solutions beyond the default options provided by Primavera Cloud. Primavera Gateway provides more default business flows than the direct integration method, but you can also create new business flows if these don't fit your needs. Primavera Gateway is required to add or modify field mapping templates, business flows, or synchronizations. You must also use Primavera Gateway to create connections to P6 and Primavera Cloud. After these connections are established, you can run synchronizations from Primavera Gateway. You can also add the synchronizations from Primavera Gateway to your Primavera Cloud deployment and run the synchronizations from Primavera Cloud.

  Consult the ***Primavera Gateway*** (***https://docs.oracle.com/en/industries/construction-engineering/primavera-gateway/index.html***) documentation for a comprehensive selection of Gateway information including user administration, end user help documentation, custom business flow and synchronization configurations, connecting P6 and Primavera Cloud applications, and transferring data between P6 and Primavera Cloud. The use of Gateway requires a Gateway license.

  After your Gateway deployment is connected to P6 and Primavera Cloud and you have created the necessary business flows and synchronizations, you can add and run the synchronizations from Primavera Cloud. See the ***Integrate Gateway*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/139422.htm***) section of the *Primavera Cloud Help* for more information.

Project Integration Framework

Project Integration Framework (PIF) is a data migration tool that can be used when you need to migrate a lot of projects from P6 to Primavera Cloud. PIF consists of configurable pre-built interfaces that can automate data migration and significantly reduce your migration timeline. The PIF migration utility leverages P6 XML import to migrate project data and can be extended to transfer data that is not supported by P6 XML import.

> **Note**: Data migration using PIF is entirely managed by Oracle Consulting Services.

To migrate data using PIF, you first need to identify the P6 projects you want to transfer and assign them a code. The PIF tool then exports the identified projects to P6 XML format and imports them in Primavera Cloud in the appropriate workspace.

Migration using PIF is done in two phases - test and final. In the test migration phase, the projects are transferred to the non-production workspace so you can test and validate the data. After data validation, the projects are moved to the production workspace during the final migration. It is recommended that you set up the workspace hierarchy before moving the projects to the production workspace so they can be placed in their appropriate workspaces.

Based on your organization's needs, you can choose between two types of migration options using PIF - **Base** and **Advanced**.

- **Base Option**: The Base option is an out-of-the-box solution with a fixed scope. With this option, Oracle Consulting Services will help you migrate up to 100 active project schedules with global data and up to three most recent baselines for each project schedule. They can also create a backup of your inactive projects by exporting them into P6 XML format. Additionally, they will also do the following configurations in Primavera Cloud to support your data migration:
  - Create six workspaces with their associated settings for activities, projects, and programs
  - Configure up to five user groups and five root workspace permission sets for projects, portfolios, and programs
  - Assign up to 25 users to workspaces, projects, user groups, and permission sets
  - Configure global application settings

  > **Note**: The Base migration option cannot be used to transfer BI reports, dashboards, integrations, documents, MS SQL to Oracle conversion, P6 database consolidation, and training.

- **Advanced Option**: The Advanced option is highly configurable and can accommodate your organization's specific data migration requirements. You can use the Advanced option to transfer all data that is included in the Base option, plus your specific requirements from the following:
  - Activity Codes
  - BI reports
  - Calendars
  - Global Data
  - Integrations
  - Layouts
  - Project Codes
  - Project Schedules
  - Resource Assignments
  - Resource Codes
  - Resources

- Role Assignments
- Roles
- UDFs (called Configured Fields in Primavera Cloud)
- Units of Measure

> **Note**: Contact your Oracle sales representative if you would like to explore the PIF method to transfer your P6 data to Primavera Cloud.

P6 EPPM Web Services and the Oracle Primavera Cloud API

P6 EPPM Web Services is a toolset that enables developers to integrate external applications with P6 EPPM. It can be used to create custom solutions that combine P6 data with other technologies. The Oracle Primavera Cloud API provides a more flexible environment for configuring your Primavera Cloud data.

There is one method incorporating the P6 EPPM Web Services and Oracle Primavera Cloud API technologies that you can use to migrate your data from P6 to Primavera Cloud:

- **P6 EPPM Web Services** and the **Oracle Primavera Cloud API**: Use this method to retrieve supported data from your P6 deployments and create corresponding data in Primavera Cloud. P6 EPPM Web Services supports both cloud and on-premises P6 deployments. This solution offers greater flexibility and customization than the import or integration methods, but it is also more complex to configure.

  The Integrating section of the ***P6 EPPM User and Integration Documentation*** (***https://docs.oracle.com/cd/F37125_01/99113.htm***) contains links to the P6 EPPM Web Services Programming Guide and the P6 EPPM Web Services Reference Guide. Consult the ***Oracle Primavera Cloud REST API*** (***https://docs.oracle.com/cd/E80480_01/English/integration/primavera_rest_api/index.html***) documentation for comprehensive operating information for the Primavera Cloud API.

Transferable and Nontransferable Data

Each migration method supports the transfer of different sets of data objects from P6 to Primavera Cloud. An object that is transferable using one method may not be transferable using another method. Use the information below to review how the import, integration, Project Integration Framework (PIF), and P6 EPPM Web Services methods transfer data, including the data that is transferable using any of the methods and the data that cannot be transferred using any of the methods. For more information on each method, see ***Migration Methods*** (on page 47).

Transferable vs. Nontransferable Data

The Transferable Data section contains the P6 data objects that are transferable by at least one of the migration methods. Transferable Data is separated into Workspace-level Data and Project-level Data tables. These tables identify where each object is stored in Primavera Cloud, which may be different than the object's location in P6. In general, transferable workspace-level data consists of dictionary objects such as calendars, codes, locations, and UDFs, which can all be assigned to child workspaces and projects within a workspace. Transferable project-level data contains project-specific dictionaries such as calendars and codes, and project-specific objects such as activities, resource assignments, risks, and the WBS. While workspaces store workspace-level codes, code values, UDFs, and UDF values, and projects store project-level codes and code values, the assignment of these values to project objects is stored with the project. When a transferable object is moved between applications, its associated data is also included. For example, each activity that is transferred includes its dates, durations, units, costs, types, code and UDF assignments, and resource assignments.

Data that is not transferable using any of the migration methods is listed in the Nontransferable Data section. This section is separated into two lists. The first lists P6 data that cannot be transferred but is supported in some form by Primavera Cloud. The second lists P6 data that cannot be transferred, is not supported by Primavera Cloud, and has no functional equivalent.

Import

The P6 Import migration method transfers projects and their associated data into Primavera Cloud using an XML or XER file. Any workspace-level data that is assigned to the project is stored in Primavera Cloud at the project's parent workspace level and assigned to corresponding project-level objects. Project-level data is stored with the project. P6 data that is not associated with the projects in the XML or XER file is not included in the file. You cannot use the import method to transfer entire P6 dictionaries such as resources, roles, risk matrixes, and risk thresholds.

Note: Primavera Cloud supports baselines and scenarios exported as part of their current schedule or individual projects in XML format. Baselines and scenarios can only be exported from Primavera Cloud as individual projects in XER format.

Integration

The Direct Integration with P6 and Integration using Primavera Gateway methods support two business flow types: Global and Project. Global business flows (called "Master" business flows if running integrations from Primavera Gateway) include workspace-level data objects that influence all subsequent transfers from P6 to Primavera Cloud. You can run global business flows to transfer entire P6 dictionaries for the following objects: Calendars, Enterprise Project Structure (transferred as "EPS" codes to Primavera Cloud), Locations, Resources, Roles, and User Defined Fields (UDFs). The Location and UDF global business objects are only supported using the Integration using Primavera Gateway method. Global business objects are stored by the workspace where the integration was run or, if run from Primavera Gateway, the workspace destination specified. Global business flows are an efficient method to migrate entire object dictionaries from P6 to Primavera Cloud, but there are some alternative options if you want to limit what is transferred. Use project business flows, described below, to only transfer objects associated with a project. Project business flows do not transfer entire dictionaries. You can also use the Integration using Primavera Gateway method to set up global data filters, which limit the global objects that are sent to Primavera Cloud. For example, if you only want to transfer a subset of your P6 Resource dictionary, use filters to specify the resources that are transferred.

Project business flows include workspace-level and project-level data objects that are associated with a particular project. Project-level data is stored with the project where the integration was run. Workspace-level data assigned to the project is stored in the project's parent workspace. P6 data that is not associated with the project is not included in a project business flow. Some of the objects supported in global business flows (calendars, resources, roles, UDFs) are also supported in project business flows, but only for data assigned to the project. For example, the only resources that will be transferred from P6 to Primavera Cloud in a project business flow are the resources assigned to activities in the project. These resources will be stored in Primavera Cloud at the workspace level, made available to the project-level resource dictionary, and assigned to applicable activities in the project. If you want to transfer an entire P6 dictionary to Primavera Cloud, run a global business flow for an object that supports it.

Both integration methods offer default solutions to help you get started. Because the Direct Integration with P6 method is intended to handle the most common migration requirements, fewer business objects are supported than the Integration using Primavera Gateway method. Use the Integration using Primavera Gateway method if you need to migrate the additional data objects it supports or if you require additional customizable integration options.

Project Integration Framework

The PIF tool provides a data migration solution that is entirely managed by the Oracle Consulting Services and can be configured and customized to suit your organization's needs. You can use the Base migration option to migrate up to 100 active project schedules with limited global data, migrate up to three most recent baselines for each project schedule, and create a backup of inactive projects by exporting them into P6 XML format. Or, you can opt for the Advanced option to transfer all global data, BI reports, layouts, integrations, and project schedules. The Advanced option can be customized to accommodate your organization's specific data migration requirements, which are not covered in the Base option.

To migrate data using PIF, you first need to identify the P6 projects you want to transfer and assign them a code. The PIF tool then exports the identified projects to P6 XML format and imports them in Primavera Cloud in the appropriate workspace. Before migrating, you must ensure there are no duplicate role IDs in P6 as it can cause the XML import to fail. It is also recommended that you delete any unused codes, global and resource calendars, roles and resources, UDFs, resource curves, and units of measures before migrating.

The PIF utility supports migrating all data that P6 XML import supports. It can also optionally be extended to migrate global data that is not referenced by the projects you want to migrate.

P6 EPPM Web Services and Oracle Primavera Cloud API

The P6 EPPM Web Services and Oracle Primavera Cloud API method is completely customizable, enabling you to read P6 data and recreate it in Primavera Cloud. There are fewer limitations inherent in this method than import or integration. The data extracted from P6 using P6 EPPM Web Services must be supported by a Primavera Cloud API endpoint, and the type of data must be compatible between the two tools. Due to the less restricted nature of web services and APIs, it may be possible to move data between two different and dissimilar objects as long as both support the type of data being moved. This includes data that is supported in Primavera Cloud but is nontransferable using any of the other methods. For this reason, an explicit list of transferable and nontransferable data has not been provided for this method. If you want to learn more about the business objects supported by P6 EPPM Web Services and the Primavera Cloud API, consult their respective documentation libraries, found in ***Migration Methods*** (on page 47).

Transferable Data

Transferable Workspace-level Data

Data Objects	P6 XML/XER Import	Direct Integration with P6	Integration using Primavera Gateway	Project Integration Framework
Calendars • Global • Resource • Project **Note**: P6 XML or XER Import transfers **Project** calendars to the project level, while the integration methods transfer Project calendars to the workspace level. In all methods, **Global** and **Resource** calendars are transferred to the workspace level.	Y	Y	Y	Y

Codes & Code Values - Activity - Resource - Project **Notes**: - Codes marked as **Secure** in P6 are transferable, but there is no such designation in Primavera Cloud. - **EPS** and **Global** activity code types are transferred to the workspace level. **Project** activity code types are transferred to the project level.	Y	Y	Y	Y

EPS Codes **Note**: The EPS in P6 is sent to Primavera Cloud as a hierarchical structure of project code values representing the P6 EPS. Using these codes is only necessary if you plan to transfer data from Primavera Cloud to P6. Assign a P6 EPS code value to a Primavera Cloud project to ensure the project data is sent to the correct EPS node in P6 when you run the appropriate Primavera Cloud to P6 integration.		Y	Y	
Locations			Y	
Resource and Role Availability	Y			Y
Resource and Role Rates	Y	Y	Y	Y
Resource Code Assignments	Y	Y	Y	Y
Resource Curves	Y			Y

Resources and Roles (and hierarchical parents) **Notes**: ▸ P6 XML or XER Import only includes resources and roles that are assigned to activities in the projects being imported. These resources and roles are stored in their project's parent workspace, made available in the project-level resource and role dictionaries, and assigned to applicable activities. ▸ Integrations run with global business flows that include resource or role business objects will transfer the entire P6 resource or role dictionaries into Primavera Cloud. If you run the	Y	Y	Y	Y

Resource/Role Associations	Y		Y	Y
Risk Threshold Levels	Y	Y	Y	Y
Risk Thresholds	Y	Y	Y	Y
Risk Matrix Scores	Y	Y	Y	Y
Risk Matrix Thresholds	Y	Y	Y	Y
Risk Matrices **Note**: P6 XML or XER Import only includes the single risk matrix assigned to each project being imported.	Y	Y	Y	Y
Units of Measure	Y		Y	Y
User Defined Fields (UDFs) - Activity - Project **Notes**: You can only transfer Project UDFs with a UDF Type of "Manual." a. Resource Assignment b. Risk Fields c. WBS Fields	Y	Y	Y	Y

Transferable Project-level Data

Data Objects	P6 XML/ XER Import	Direct Integration with P6	Integration using Primavera Gateway	Project Integration Framework
Activities	Y	Y	Y	Y
Activity Codes and Code Values (Project-level)	Y	Y	Y	Y
Activity Notebook Topics	Y	N	N	N
Activity Relationships	Y	Y	Y	Y
Activity Risk Assignments	Y	Y	Y	Y

Baselines **Notes**: ▸ You can transfer any three baselines in the import file using P6 XML Import and you can transfer the three most recent baselines per import using PIF. ▸ Baseline types can only be imported (as baseline categories in Primavera Cloud) using P6 XML Import if assigned to baselines and selected for import. ▸ P6 XER format does not support baselines; therefore, projects are exported without baselines in XER format.	Y	Y	Y	Y

Calendar Assignments - Activities - Projects - Resource Assignments	Y	Y	Y	Y
Code Assignments - Activity - Project	Y	Y	Y	Y
Project Calendars **Note**: P6 XML or XER Import transfers **Project** calendars to the project level, while the integration methods transfer project calendars to the workspace level.	Y	Y	Y	Y
Project Default Calendar	Y			Y
Project Settings	Y			Y
Projects **Note**: The integration methods support the transfer of project data, but not the projects themselves.	Y			Y

Resource and Role Assignment Costs	Y			Y
Resource and Role Assignment Units	Y	Y	Y	Y

Resource and Role Assignments **Notes**: ▸ P6 XML or XER Import only includes resources and roles that are assigned to activities in the projects being imported. ▸ Project business flows that include resource or role business objects will only transfer resources or roles assigned to the project where the integration was run. Run global business flows that include resources and roles if you want to transfer your entire P6 resource or role dictionaries. ▸ Resources and roles that are imported or transferred using a project business flow are stored in	Y	Y	Y	Y

Resource and Role Rates	Y		Y	Y
Risk Impacts	Y	Y	Y	Y
Risk Matrix and Threshold Assignments	Y	Y	Y	Y
Risk Matrix Scores	Y	Y	Y	Y
Risk Response Actions **Note**: Primavera Cloud supports a single response plan for each risk. Only response actions under an active response plan will be transferred.	Y	Y	Y	Y
Risk Response Action Impacts **Note**: The lowest response action impact values under each active response plan will be transferred and stored as post-response values at the risk level.	Y	Y	Y	Y

Risk Response Plans **Note**: Primavera Cloud supports a single response plan for each risk. Only response actions under an active response plan will be transferred.	Y	Y	Y	Y
Risks	Y	Y	Y	Y
Scheduler Settings	Y	Y	Y	Y
UDF Assignments - Activity - Project - Resource Assignment - Risk - WBS	Y	Y	Y	Y
WBS Spreads		Y	Y	
Work Breakdown Structure (WBS)	Y	Y	Y	Y
WBS Summary Activities	Y	Y	Y	Y

Nontransferable Data

Nontransferable Data Supported in Primavera Cloud

The P6 data listed below cannot be transferred using any of the migration methods, but the functionality is supported in Primavera Cloud. You must manually create data for these objects in Primavera Cloud if you still want to use them. Many pages in Primavera Cloud support downloadable spreadsheet templates, which enable you to quickly create large amounts of object-specific data and import it into Primavera Cloud. Some of the objects listed may have been renamed in Primavera Cloud, or there may be differences in functionality. See ***Terminology Differences*** (on page 42) and ***Functional Differences*** (on page 9) for more information.

- Application Settings
- Budget Approval Details
- Budget Approvals
- Budget Change Details
- Budget Changes
- Budget Transfer Details
- Budget Transfers
- Currencies
- Dashboards
- Discussions
- Documents
- Filters
- Financial Periods (Reporting Cycles in Primavera Cloud)
- Funding Sources
- Global Security Profiles
- Layouts (unique to P6 Pro)

  Note: Views in Primavera Cloud provide much of the same functionality as layouts, although they are not functionally equivalent.

- Overhead Codes

  Note: Primavera Cloud enables users to categorize time by creating Hour Types.

- Owner

  Note: The Owner field exists in Primavera Cloud, but ownership of imported objects is automatically assigned to the user who imported the objects.

- Portfolios
- Primary Role Designation
- Project Budget Change Logs

- Project Funding
- Project Planning Resources

> **Note**: High-level resource planning is performed in Primavera Cloud by creating resource demand.

- Project Resource Allocations
- Reports
- Resource and Role Rate Types
- Scheduled Services

> **Note**: You can schedule Level and Schedule jobs in Primavera Cloud and manually run Import, Export, Level, and Schedule jobs.

- Secure Codes

> **Note**: Secure codes are not supported in Primavera Cloud. You can, however, restrict certain configured fields for projects in Primavera Cloud by managing user privileges at a workspace level.

- Stored Images

> **Note**: Primavera Cloud enables users to upload photos and associate them with workspaces, projects, and other objects.

- Tasks

> **Note**: Tasks can only be transferred from Primavera Cloud to P6.

- Timesheet Data
- Timesheet Periods
- User Interface Views
- User Preferences
- Users
- Views

Nontransferable Data Not Supported in Primavera Cloud

The P6 functionality and data listed below cannot be transferred using any of the migration methods, and there is no functional alternative supported by Primavera Cloud.

- CBS Duration Summaries
- CBS Expense Spreads
- CBS Resource Spreads
- Cost Accounts
- Data Limits
- Document Categories
- Document Status

- Enterprise Project Structure (EPS)
- Expense Categories
- Expenses
- External Applications
- Issues
- Organizational Breakdown Structure (OBS)
- Overhead Codes
- Performance Thresholds
- Project Security Profiles
- Project Spending Plans
- Publication Services
- Reflections
- Resource and Role Teams
- Resource Notes
- Resource Shifts
- Risk Categories
- Step Templates
- Steps
- Summarization
- Thresholds (unique to P6 Pro)
- Tracking layouts
- UDF (Configured Field) Types
  - Documents
  - Expenses
  - Issues
  - Resources
  - Steps
  - Project UDFs with a UDF Type of **Formula** are not supported.
  - UDF names must begin with a letter. Names cannot contain spaces, reserved words, multi-byte characters, or special characters except for an underscore.
  - UDFs with a Data Type of **Indicator** are not supported.
- Visualizer
- WBS Categories
- WBS Expense Spreads
- WBS Milestones
- WBS Resource Spreads

Data Validation

Each time you use one of the migration methods to transfer data, you should validate the data in Primavera Cloud to ensure it was transferred successfully, accurately, and completely. The following list is a series of validation checks you can perform on your Primavera Cloud data. Depending on the method used and the data that was transferred, some steps may not be applicable to you.

1) **Review Logs**: Service logs for the import and integration methods provide details about the job that was run. The status of a job indicates if it completed successfully, completed with warnings or errors, or failed to complete. Use the log to review job details, including the date and time it was run, who the job was run by, the data that was transferred and its destination, and the specific reasons for warnings, errors, or failures. You can attempt to resolve any issues present in the log and try to run the process again.
2) **Review Workspace Data**: Compare your source data in P6 with the transferred data in Primavera Cloud to ensure accurate values.
   - Dictionary data and UDFs associated with an imported project or as part of a project business flow should be stored in the parent workspace of the project.
   - Resources and roles associated with a transferred project should be stored in the parent workspace's resource or role dictionary.
   - If you ran a global business flow, the full dictionaries included in the flow should be stored in the destination workspace.
   - The sharing method of dictionary items is set to Manual by default. Set an item's sharing method to Automatic if all child workspaces should automatically inherit the item.
3) **Review Project Data**: Compare your source data in Primavera Cloud with the transferred data in Primavera Cloud to ensure accurate values.
   - Confirm that any imported projects are located in the workspace where they were imported. The user who imported the projects is assigned as their manager. You can select a different user as each project's manager, if necessary.
   - Review all project settings to ensure they were transferred accurately.
   - Resources and roles associated with a transferred project should be available in the project-level resource or role dictionaries. They should be owned at the project's parent workspace level and assigned to all applicable project activities.
   - Compare the quantities of project-level objects such as the total number of activities, resources, relationships, and resource assignments. You may need to adjust date, time, and number units in your user preferences before comparing data.
4) **Baseline the Project**: You may want to create a new baseline for each transferred project immediately after the import or integration is complete. This preserves the initial condition of the projects for reference purposes.
5) **Schedule the Project**: After P6 project data is transferred into Primavera Cloud, schedule the project before making any updates. You can schedule multiple projects at the same in by including them in a program.
6) **Recalculate Costs**: Because of differences in how costs are calculated between P6 and Primavera Cloud, you should recalculate costs in your project schedule after transferring project data.

7) **Manually Review Data**: After the project is scheduled and costs are recalculated, you may choose to compare your data to its source a second time. Review dates, durations, relationships, assignments, and calculated fields. If you imported a cost-loaded project schedule, it is especially important to check resource and role rates at both the workspace and project levels. Differences in resource and role rates between the workspace and project levels in Primavera Cloud may occur when importing into Primavera Cloud.
8) **Baseline the Project**: After you have scheduled your project and reviewed its data to ensure accurate values, you should baseline the project again. This baseline should serve as the starting point before you begin to record progress on your data.
9) **Begin Using Primavera Cloud to Manage Your Project**: With your project data transferred, reviewed, and baselined, you may now proceed with updating your project schedule.

P6 vs. Primavera Cloud - A Quick Reference

This section provides a comprehensive comparison between the main functional areas of P6 and Primavera Cloud. Primavera Cloud offers a variety of enhancements over P6. Many P6 concepts, which cannot be directly replicated, can be configured and implemented in various ways in Primavera Cloud. The following topics list the supported, partially supported, or not supported features in Primavera Cloud for each functional area.

Note: The comparison between P6 and Primavera Cloud is based on the most recently released version of each P6 product. Some features may not be available for you if you are using an older version of the product.

Administration

This section lists the Administration differences between P6 and Primavera Cloud. For more information about the Administration functionality in Primavera Cloud, refer to the ***Global Admin*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/101142.htm***) section of the Oracle Primavera Cloud Help on Oracle Help Center.

General

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Application Settings	Y		Available in Admin Preferences menu.	Y	
Embedded Enablement within Application				Y	
UPK Enabled	Y				

Global

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Global Change - Perform Calculations		Y	Y		
Global Schedule Services	Y				
Global Change - Update Existing Fields	Y	Y	Y	Y	P6 supports global change for activities, resource assignments, and expenses. Primavera Cloud supports global change for activities only.
Global Change - Update Existing WBS-level Fields	Y				

Enterprise Data/Dictionaries

In Primavera Cloud, the dictionaries are defined at workspace level. For more information, see ***Shared Data*** (on page 13).

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Activity Codes - EPS	Y	Y	Y	Y	Defined per workspace in Primavera Cloud.
Activity Codes - Global	Y	Y	Y	Y	Defined per workspace in Primavera Cloud.
Activity Codes - Project	Y	Y	Y	Y	

Activity UDFs	Y	Y	Y	Y	Defined per workspace in Primavera Cloud.
Assignment UDFs	Y	Y	Y	Y	Defined per workspace in Primavera Cloud.
Baseline Types	Y		Y	Y	Baseline Types are called Baseline Categories in Primavera Cloud, and they are defined per workspace. Baseline categories can also be imported using P6 XML Import if assigned to baselines and selected for import.
CBS - Cost Structure				Y	
Cost Accounts	Y	Y	Y		CBS in Primavera Cloud provides similar functionality as Cost Accounts in P6.
Cost Categories				Y	Defined per workspace in Primavera Cloud.

Cost Code Segments				Y	Defined per workspace in Primavera Cloud.
Currencies	Y		Y	Y	Defined per workspace in Primavera Cloud.
Custom Logs				Y	Custom logs are used to define template registers for recording multiple records for a project. For example, Lessons Learned Log.
Custom Log Codes				Y	Defined per workspace in Primavera Cloud.
Custom Log Types				Y	Defined per workspace in Primavera Cloud.
Custom Log UDFs				Y	Defined per workspace in Primavera Cloud.
Document Categories	Y		Y		
Document Codes				Y	Defined per workspace in Primavera Cloud.
Document Statuses	Y		Y		

Document UDFs	Y			Y	Defined per workspace in Primavera Cloud.
Expense Categories	Y		Y		
Expense UDFs	Y	Y	Y		
Financial Periods/Reporting Cycles			Y	Partially Supported	Financial Periods are called Reporting Cycles in Primavera Cloud. Primavera Cloud has 12 financial periods with pre-defined start day and month for each period.
Fund Source Codes				Y	Defined per workspace in Primavera Cloud.
Fund Source UDFs				Y	Defined per workspace in Primavera Cloud in the Funds app.

Funding Sources	Partially Supported	Partially Supported	Partially Supported	Y	In Primavera Cloud, funding sources are in the Cost and Funds app within each workspace. They can also be defined at the portfolio or project level. Funding data cannot be transferred between P6 and Primavera Cloud due to the differences in functionality.
Global Calendars	Y	Y	Y	Y	Defined per workspace in Primavera Cloud.
Issue Codes	Y				
Issue UDFs	Y	Y	Y		

Locations	Y	Y	Y	Y	In P6, locations provide the latitude and longitude values only, whereas in Primavera Cloud geographic maps show the locations of objects. Locations are also available for more objects in Primavera Cloud compared to P6 EPPM.
Notebook Topics	Y		Y	Y	
Overhead Codes	Y			Partially Supported	Hour Types in Primavera Cloud provide similar functionality as Overhead Codes in P6.
Project Calendars	Y	Y	Y	Y	
Project Codes	Y	Y	Y	Y	Defined per workspace in Primavera Cloud.
Project UDFs	Y	Y	Y	Y	Defined per workspace in Primavera Cloud.
Rate Types	Y	Y	Y	Y	

Resource Calendars	Y	Y	Y	Partially Supported	Resource Calendars are not directly supported in Primavera Cloud. Instead, you can assign a specific workspace-calendar to a resource.
Resource Codes	Y	Y	Y	Y	Defined per workspace in Primavera Cloud.
Resource Curves/Curve Profiles	Y	Y	Y	Y	Resource Curves are called Curve Profiles in Primavera Cloud.
Resource Dictionary	Y	Y	Y	Y	Defined per workspace in Primavera Cloud.
Resource Shifts	Y	Y	Y		
Resource UDFs	Y	Y	Y		
Risk Categories	Y		Y		
Risk Codes				Y	Defined per workspace in Primavera Cloud.
Risk Forms				Y	Defined per workspace in Primavera Cloud.
Risk Matrix Templates	Y			Y	Defined per workspace in Primavera Cloud.

Risk Threshold Templates	Y			Y	Defined per workspace in Primavera Cloud.
Risk UDFs	Y		Y	Y	Defined per workspace in Primavera Cloud.
Risk Workflows				Y	Defined per workspace in Primavera Cloud.
Role Codes				Y	Defined per workspace in Primavera Cloud.
Role Dictionary	Y	Y	Y	Y	Defined per workspace in Primavera Cloud.
Step Templates	Y	Y	Y		
Step UDFs	Y	Y	Y		
Task Codes				Y	Defined per workspace in Primavera Cloud.
Task UDFs				Y	Defined per workspace in Primavera Cloud.
Timephased Exchange Rates				Y	Defined per workspace in Primavera Cloud.

Timesheet Periods (In Primavera Cloud, timesheets can only be created in weekly intervals.)	Y		Y	Y	Primavera Cloud supports weekly timesheet periods, which can be configured using the Timesheet Settings.
Units of Measure	Y	Y	Y	Y	Defined per workspace in Primavera Cloud.
WBS Categories	Y		Y		WBS Codes or UDFs can be used for WBS Categories in Primavera Cloud.
WBS Codes				Y	
WBS UDFs	Y	Y	Y	Y	Defined per workspace in Primavera Cloud.
Work Package Codes				Y	Defined per workspace in Primavera Cloud.
Work Product and Document UDFs		Y	Y		
Work Package UDFs				Y	Defined per workspace in Primavera Cloud.

User Access

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Users	Y		Y	Y	
User Groups				Y	
OBS	Y	Y	Y		
Global Security Profiles	Y		Y	Y	Available in the Global and Workspace permissions sets in Primavera Cloud.
Project Security Profiles	Y		Y	Y	Available in the Project permissions sets in Primavera Cloud.
Companies				Y	

User Interface Views

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Manage Content	Y			Partially Supported	In Primavera Cloud, Administrators can show or hide apps for specific users.
Activity Editing Settings	Y				
Expand/Collapse all and Expand/Collapse to Level Grouped Data in Grids	Y	Y	Y	Partially Supported	In Primavera Cloud, only pages with grid items that support context menu settings will have this functionality.

Dashboards

This section lists the differences in Dashboards between P6 and Primavera Cloud. P6 dashboards include pre-defined graphs and views, whereas Primavera Cloud dashboards are configurable and provide the capability to configure your own charts for workspaces, portfolios, projects, programs for all data types. For more information about the dashboards functionality in Primavera Cloud, refer to the ***Dashboards App*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/101652.htm***) section of the Oracle Primavera Cloud Help on Oracle Help Center.

Dashboards

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Dashboards	Y Enterprise and Portfolios dashboards are supported.		Y Enterprise and Portfolios dashboards are supported.	Y Workspace, Portfolios, Programs, and Project dashboards are supported.	
Add Photos and Text				Y	
Communication Center	Y				
Create Charts	Partially Supported			Y	
Custom Portlets	Y			Y	
Document Reviews	Y				In Primavera Cloud, document reviews are done through workflows and user notifications.

Earned Value Performance	Y				
Geo Location Mapping and Reporting	Y			Y	In P6, location provides the latitude and longitude values of objects, whereas in Primavera Cloud the locations of objects are displayed on a geographic map.
Index Performance	Y				
Manage Dashboards	Y			Y	
Measures				Y	
My Activities	Y			Y	Available in the User menu in Primavera Cloud.
My Calendar	Y				
My Documents	Y				
My Issues	Y				
My Projects	Y			Y	Available in Primavera Cloud through a combination of project tiles and View All Projects scorecard.
My Risks	Y				

My Workgroups	Y			Y	Available in Primavera Cloud through a combination of workspaces tile and View All Workspaces scorecard.
Open Request for Resources	Y				
Portfolio Views	Y			Y	
Project Gantt Chart	Y			Partially Supported	Available on the Workspace and Portfolio dashboards in Primavera Cloud.
Project Health	Y			Partially Supported	
Project Notebooks	Y				
Project Statistics	Y			Partially Supported	
Resource Analysis Chart	Y			Y	
Schedule Performance	Y				
Strategies Scorecard				Y	
Top 10 Activities				Y	
Top 10 Activities Starting This Week				Y	
Top 10 Activities Finishing This Week				Y	
Top 10 Risks				Y	

Trend/History Data				Y	

Ideas

Ideas functionality does not exist in P6 and is unique to Primavera Cloud. For more information, refer to the ***Ideas*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/141569.htm***) section of the Oracle Primavera Cloud Help on Oracle Help Center.

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Proposals and Projects auto-creation				Y	
Configured Codes				Y	
Configurable Forms and Workflows				Y	
Configured Fields				Y	
Configured Views and Scorecards				Y	
Evaluation Matrix and Configured Scoring				Y	
File Repository per Idea				Y	
Investor Map				Y	
Scorecard Ranking and Comparison				Y	

Mobile

This section lists the mobile app differences between P6 and Primavera Cloud.

Mobile

Common Features

Feature	P6 Team Member Web (iOS and Android)	Primavera Cloud (iOS and Android)	Notes
Discussion Threads		Y	
Location Services on Mobile Device	Y		
Offline Usage	Y	Y	
View Files and Documents		Y	

Activity Progressing

Feature	P6 Team Member Web (iOS and Android)	Primavera Cloud (iOS and Android)	Notes
Attach Files, Photos, and videos	Y	Y	Only supported on iOS.
Custom Activity or Assignment Filters	Y		Web-defined filters are define what shows on mobile.
Filter by Codes and Configured Fields	Y	Y	
Mark up Photos or Documents	Y	Y	Only supported on iOS.
Update Assigned Activities	Y	Y	This includes progessing your resource assignments for an activity.
Update Resource Assignments	Y	Y	
View Files or Documents Attached to Activities	Y	Y	
View or Edit Codes and Configured Fields	Y	Y	

Tasks

Feature	P6 Team Member Web (iOS and Android)	Primavera Cloud (iOS and Android)	Notes
Task Analysis		Y	This is a subset of View/Charts available in the web version.
Work Plan - Edit and Review		Y	Only supports fixed data window (for example, last week, this week, next week)
View or Edit Codes and Configured Fields		Y	
Filter by Codes and Configured Fields		Y	
Task Constraints		Y	
Task Hand-offs		Y	
Daily Work Plan Report		Y	

Timesheets

Feature	P6 Team Member Web (iOS and Android)	Primavera Cloud (iOS and Android)	Notes
Timesheet Submission	Y		
Timesheet Approval	Y		

Portfolios

This section lists the portfolio management differences between P6 and Primavera Cloud. For more information on how portfolios are managed in Primavera Cloud, refer to the ***Portfolios*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/98996.htm***) section of the Oracle Primavera Cloud Help on Oracle Help Center

General

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Portfolio Home Page				Y	
Contains Portfolios				Y	
Contains Projects				Y	
Contains Programs				Y	
File/Document Repository				Y	
Funding Sources				Y	
Snapshots				Y	

Manage Portfolios

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
By Filter	Y			Y	
Manual Creation	Y	Y	Y	Y	In P6 Professional, portfolios are only used for opening projects.
Scheduled Automation				Y	

Manage Portfolio Views

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Histograms	Y	Y	Y	Y	Available for Dashboard charts and Budget and Resource Planning View in Primavera Cloud.
Investor Maps/Bubble Charts	Y			Y	
Measures Tracking				Y	
Pie Charts	Y			Y	Available for Dashboard charts in Primavera Cloud.
Prioritization Matrix				Y	
Scorecards	Y			Y	
Side-by-side Histograms	Y			Y	
Sparklines on Measures				Y	
Spending Plan				Y	In Primavera Cloud, the Spending Plan provides an annual breakdown of the budget, including forecasted, actual, and approved budget for a portfolio.

Stacked Histogram	Y	Y	Y	Y	
Trend Charts				Y	In Primavera Cloud, Trend Charts provide comparison against historical data, periodically.

Budget Planning

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Approval Workflows				Y	
Configurable Planning Sheet				Y	
Funding Allocation and Analysis				Y	
Link/Unlink Project Budget/Forecast				Y	
Manage Multiple Scenarios				Y	
Manual Selections of Projects	Y			Y	
Scenario Comparison				Y	
Scenario Optimization - Efficient Frontier				Y	
Scenario Optimization - Waterline	Y			Y	
Spending Plan per Scenario				Y	
Target Budget per Scenario				Y	

Unmet Dependencies				Y	

Resource Planning

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Allocations Gantt	Y			Y	
Approval Workflows				Y	
Capacity Planning	Y	Y - Tracking View	Y - Tracking View		Capacity plan displays a gantt chart and role based profile or spreadsheet. Tracking View can display a gantt chart and resource profile or spreadsheet.
Configurable Planning Sheet				Y	
Full-Time Employees or Hourly				Y	
Gantt Chart	Y	Partially Supported in Project View	Partially Supported in Project View		P6 EPPM Web Portfolio Gantt Chart displays a project-level summary gantt and project units or costs in a spreadsheet or histogram. Project View displays project-level summary gantt.

Manage Multiple Scenarios				Y	
Manual Selections of Projects	Y			Y	
Performance Status	Y	Y - Project View	Y - Project View		P6 EPPM Web offers a consolidated view of project performance within a portfolio. Performance status columns can be displayed in the Project View of P6 Professional.
Return On Investment (ROI)	Y			Y	
Role Graph Analysis per Scenario	Partially Supported			Y	
Scenario Optimization - Efficient Frontier				Y	
Scenario Comparison				Y	

Programs

This section lists the program management differences between P6 and Primavera Cloud. For more information on how programs are managed in Primavera Cloud, refer to the ***Programs*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/154364.htm***) section of the Oracle Primavera Cloud Help on Oracle Help Cente

Schedule

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Configurable Summary Bars		Y	Y		

Consolidated Multi-project Schedule	Y	Y	Y	Y	
Inter-project Dependencies	Y	Y	Y	Y	In Primavera Cloud, inter-project dependencies can only be created between projects in the same program.
Multiple Float Path Method	Y	Y	Y	Y	
Multiple Float Path Method or Number of Paths	Y	Y	Y	Y	
Program Milestones and Summary View	Partially Supported	Partially Supported	Partially Supported	Y	
Program Role/Resource Usage		Y	Y	Y	
Tracking Gantt		Y	Y		

Resources/Roles

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Resource Analysis	Y	Y	Y	Y	
Resource Assignment Analysis	Y	Y	Y	Y	

Costs

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Program Budget (top-down)				Y	

Program Cashflow				Y	
Program Funds				Y	
Summary Cost Sheet by CBS Code				Y	
Summary Cost Sheet by Cost Category				Y	
Summary Cost Sheet by Project	Y	Y	Y	Y	
Tracking Gantt - Cost Profiles		Y	Y		

Risks

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Program Risk Matrix and Thresholds				Y	
Program Risk Register	Y		Y	Y	
Program Specific Risks				Y	
Risk-adjusted Program Schedule				Y	

Lean Tasks

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Commit Tasks and Progress Tasks				Y	
Create/Plan Tasks				Y	
Hand-Offs				Y	

Print Saved Views of Program Tasks				Y	
Task List, Configured Views				Y	

Strategic Alignment

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Evaluation Matrix				Y	

Other

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Custom Logs				Y	
File/Document Registry				Y	
Program Dashboards				Y	

Projects

This section lists the project management differences between P6 and Primavera Cloud. For more information on how projects are managed in Primavera Cloud, refer to the ***Projects*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/81888.htm***) section of the Oracle Primavera Cloud Help on Oracle Help Center.

General

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Project Home Page				Y	
Claim Digger and Schedule Comparison		Y	Y	Y	Schedule Comparison is available in Primavera Cloud.

Configurable Project Details Form				Y	
External Applications		Y	Y		
Configurable Metadata Updates in Forms				Y	
Monitor Thresholds		Y	Y		
News Feed				Y	
Project Alerts				Y	
Project Scheduled Services	Y	Y - Job Services	Y - Job Services	Y - Manage Services	All services are run as background services in Primavera Cloud including scheduled runs, such as reports and notifications.
Project-specific Codes and Calendars	Y		Y	Y	
Publish Project Website		Y	Y		
Store Period Performance	Y	Y	Y	Y	
Top-down Estimation		Y	Y		

Project Team

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Companies and Companies Details				Y	

Project Users, User Groups, and Security Permissions	Y	Y	Y	Y	

Strategic Alignment

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Evaluation Matrix				Y	
Strategies and Project Contribution				Y	

WBS Dictionary

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
WBS Page		Y	Y	Y	
Add a WBS from a Template or Another Project		Y	Y	Y	
Tabular or Chart View	Partially Supported	Y	Partially Supported		P6 EPPM Web and Primavera Cloud support only tabular views.
Copy and Paste	Y	Y	Y	Y	
Earned Value and ETC Calculation Rules by WBS	Y	Y	Y		
Permissions by WBS	Y	Y	Y		
Saved Views	Y	Y	Y	Partially Supported	In Primavera Cloud, view changes are saved per user.

Top-down WBS and Bottom-up Aggregated Budgets	Y	Y	Partially Supported	Partially Supported	Primavera Cloud supports top-down budgeting at the project level. Bottom-up budgets are aggregated to the WBS on the Activities page.
User-Defined Fields (UDFs)/Configured Fields	Y	Y	Y	Y	UDFs are called Configured Fields in In Primavera Cloud.
WBS Codes				Y	
WBS Milestones	Y	Y	Y		
WPs and Documents	Y	Y	Y	Y	Supported through file attachments in Primavera Cloud.

Activities

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Activity Codes	Y	Y	Y	Y	
Activity Types (Activity/Resource Dependent, Start/Finish Milestone. LOE, WBS Summary)	Y	Y	Y	Y	
Activity View	Y	Y	Y	Y	

Activity Network Boxes - Editable and Configurable Box Positions	Y	Y	Y	Y	
Apply Filter to Bars		Y	Y		
Assign Codes, Risks, Predecessors and Successors to Multiple activities		Y	Y	Y	
Conditional Row, Column, and Cell Formatting				Y	
Collapsed Bar Formatting		Y	Y		
Color-coded Bars by Activity Code	Y			Y	
Combined Relationship Detail Panel	Y	Y	Y	Y	
Configurable Columns, Grouping, and Filtering	Y	Y	Y	Y	
Configurable Progress Bar		Y	Y	Y	
Configurable Sight Lines	Partially Supported	Y	Y	Partially Supported	
Customize Endpoints, Patterns, and Label Positions		Y	Y		
Data Date Progress Options		Y	Y		
Discussion Threads	Y			Y	

Display Activity or Resource Spreadsheet/Histogram as a Bottom Layout		Y	Y	Y	
Display Resource Allocation when Assigning Resources to Tasks	Y			Y	
Duration Types	Y	Y	Y	Y	
Editable and Configurable Activity Network Boxes	Y	Y	Y	Y	
Fill Down	Y	Y	Y	Y	
Filtered Activity Search and Find	Y			Y	
For Review Activity Field		Y	Y		
Global Update	Y	Y	Y	Y	
Import WBS and Activities from Another Template or Project	Y			Y	
Import and Export to and from Excel	Y	Y	Y	Y	

Increment Activity ID Based on Selected Activity	Y	Y	Y	Y	In Primavera Cloud, this setting identifies activities by the highest sequence ID and then auto-increments as specified. In P6, numbering gaps are identified and filled in when incremented.
Layouts (Grid, Gantt, and Network)	Y	Y	Y	Y	Primavera Cloud only supports the Activity Network for schedules with fewer than 6000 activities.
Line numbers		Y	Y	Partially Supported	Primavera Cloud supports line numbers while printing.
Link Activities	Y	Y	Y	Y	
Manage WBS in Activities View	Y			Y	

Merge Selected Activities from a source Schedule into a target schedule (a baseline, the current schedule, or a scenario).			Y	Y	Primavera Cloud supports selection of activities for inclusion in a merge to a baseline, a scenario, or the current schedule. P6 Professional supports the creation of a project reflection, and the merge of activities within it, to a source project.
Multiple Column Sorting	Y	Y	Y	Y	
Notebooks	Y	Y	Y	Y	
Open Dependent Projects	Y			Partially Supported	In Primavera Cloud, this functionality is supported through programs.

Percent Complete Type	Y	Y	Y	Y	P6 EPPM Web and P6 EPPM Client support physical, duration, and unit percent complete types. Primavera Cloud supports physical, duration, unit, and scope percent complete types.
Pin Columns	Y			Y	
Primary and Secondary Constraints	Y	Y	Y	Y	
Quick Access for Column Functions (Sort, Group, Width)	Y			Y	
Quick Search for Columns	Y			Y	
Renumber Activity IDs		Y	Y	Y	
Reorganize Now		Y	Y	Y	
Replace Relationship Assignment	Y	Y	Y	Y	
Relationship Slide-out Panel				Y	
Risk Analysis Results in Gantt chart				Y	
Schedule Comparison	Y			Y	

Scope Assignments				Y	
Set and Display Tertiary Baseline in Activities View		Y	Y	Y	
Shrink Vertical Grouping Bands		Y	Y		
Steps	Y	Y	Y		
Tasks, Task Status, and Indicators on Activities	Partially Supported	Partially Supported	Partially Supported	Y	In P6, Tasks, Task Status, and Indicators on Activities are read-only data that have been imported from Primavera Cloud.
Timescale - Hour and Shift, Three Line, and Ordinal		Y	Y		
Trace Logic	Y	Y	Y	Y	Primavera Cloud supports Trace Logic for schedules with fewer than 6000 activities.
UDFs and Configured Fields	Partially Supported	Partially Supported	Partially Supported	Y	Primavera Cloud provides greater functionality with codes and formula based configured fields.
Undo		Y	Y	Y	

Update Progress		Y	Y		Primavera Cloud supports automatic calculation of progress.
User-defined Bars	Y	Y	Y	Y	

Scheduling

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Calculate Float Based on Each Project or Open Projects	Y	Y	Y	Y	
Calculate Start to Start Lag from Early-Start (ES) and Actual-Start (AS)	Y	Y	Y	Y	
Calendar for Relationship Lag	Y	Y	Y	Y	
Critical Based on Total Float Value or Longest Path	Y	Y	Y	Y	
Ignore or Include External Relationships	Y	Y	Y	Y	
Level Resources During Scheduling	Y	Y	Y		
Make Open-ended Activities Critical	Y	Y	Y	Y	
Multiple Float Path Method	Y	Y	Y	Y	
Multiple Float Paths or Number of Paths	Y	Y	Y	Y	

Recalculate Assignment Costs After Scheduling	Y	Y	Y	Y	
Scheduling of Progressed Activity Options	Y	Y	Y	Y	
Total Float Calculation	Y	Y	Y	Y	
Use Expected Finish Dates	Y	Y	Y	Y	Remaining Early Finish Dates will be used by default when no Expected Early Finish Dates are provided for both Primavera Cloud and P6.

Schedule Quality

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Configurable Tolerances and Targets	Y	Y	Y	Y	
Editable Descriptions of Checks				Y	
Interactive Schedule Health Scorecard with Drill-down				Y	
Project Schedule Health Score (for Portfolio Reporting)				Y	
Schedule Check Report	Y			Y	

Baselines and Scenarios

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Auto-add Missing Activities to Baseline from Current				Y	
Configurable Baseline Types	Y	Y	Y	Y	In Primavera Cloud, Baseline Types are Baseline Categories, and they can be assigned during baseline creation or when managing baselines for a project schedule. Baseline categories can be imported as part of baseline data if assigned to baselines and selected for import using P6 XML.
Create a Baseline in the Past				Y	In Primavera Cloud, you can create a baseline to represent any point in time up until the date the project was created.
Create a Baseline from a Scenario				Y	

Create a Scenario from a Baselines				Y	
Create a Scenario in the Past				Y	
Define Baselines	Y	Y	Y	Y	
Define Scenario as Schedule				Y	
Edit Baselines				Y	In Primavera Cloud, baselines are part of the same project as the current schedule and can be opened directly on the Activities page. In P6, baselines are stored as separate projects in the database and must be restored as regular projects to edit them.
Edit Scenarios				Y	
Number of Baselines Choices for Gantt	Project, User	Project, Primary, Secondary, Tertiary	Project, Primary, Secondary, Tertiary	Original, Current, Supplementary, User 1, User 2, User 3	
Number of User-assigned Baselines	Three	Three	Three	Three	

Reflection Projects		Y	Y	Partially supported	In Primavera Cloud, Reflection Projects are represented by Merge Mode which is available in Schedule Comparison.
Revert Baseline Changes				Y	
Set Scenario or Baseline to Current Schedule				Y	

Schedule Comparisons

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Easy Focus on Variances				Y	
Interactive Analysis with Scorecard, Gantt, and Drill-down				Y	
Point-in-time Comparison (as well as scenarios and baselines)				Y	

Merge Reflection Projects			Y	Partially supported	Primavera Cloud supports Merge to a baseline, the current schedule, or a scenario, and it includes activity data. Only users with the project-level Merge Activities privileges can trigger the merge process from the Schedule Comparison page. P6 Professional supports the merge of all project data from a reflection to a source project.
Project Differences Report		Y	Y		
Saved Views and Layouts				Y	

Printing

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Configurable Print Options per Saved View				Y	

Configurable Header, Footer, and Content While Printing	Y	Y	Y	Y	
Print Preview Based on Screen Choices	Y	Y	Y	Y	

Resource and Bottom-up Cost Planning

General

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Add Activity Costs without Resource Assignment				Y	
Assign Resource by Role		Y	Y		
Assign a Role or Resource to Multiple Activities	Y	Y	Y	Y	
Configurable Utilization Chart on Assignments	Y				
Expense Assignments	Y	Y	Y		
Non-unit Rate Driven Costs				Y	
Rate Type on Assignments	Y	Y	Y	Y	
Replace Resource Assignments			Y	Y	
Role and Resource Assignments	Y	Y	Y	Y	
Staff Role	Y			Y	

Use of Curves, Lags, Units/Time	Y	Y	Y	Y	
Utilization Chart on Assigning Resource or Role	Y			Y	

Project Resource and Role Usage

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Bottom Layout Resource and Role Costs Histogram and Spreadsheet		Y	Y	Y	
Early and Late Remaining Units and Costs (Planned, Actual, Available, and Overallocated)		Y	Y	Y	
Group Assignments in Spreadsheet		Y	Y		
Periodic Bars and Cumulative Curves (Individual and Total)		Y	Y	Y	
Role and Resource Selection		Y	Y	Y	
Show All Projects		Y	Y		
Sight Lines		Y	Y	Partially Supported	

Stacked by Resource Groups		Partially Supported	Partially Supported	Y	In P6, the resource groups are created manually based on filters. In Primavera Cloud, you can use the resource codes values to represent a stack.

Team Usage and Analysis

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Display Usage in Daily Timescale	Y				

Activity Usage and Assignments Sheet

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Activity Usage Histogram in Activities View		Y	Y	Partially Supported	Primavera Cloud shows activity usage aggregated to the project level.
Activity Usage Spreadsheet in Activities View		Y	Y		

Costs - Bottom-up

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Actual Costs	Y	Y	Y	Y	
Actual Costs - Current Period	Y	Y	Y	Y	

Overtime Costs		Y	Y		

Top-down Cost Planning and Funds

Budgeting

P6 and Primavera Cloud both support top-down budgeting. Primavera Cloud supports top-down budgeting from portfolios to programs to projects. You can define a budget and assign budget lines to CBS codes at the project level. On the other hand, P6 supports top-down budgeting at the EPS, project, and WBS level. Budgeting data cannot be transferred between P6 and Primavera Cloud due to the differences in functionality.

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Approval Workflow				Y	
Budget Changes	Y	Y	Y	Y	
Budget Transfers (Between Codes)				Y	
Define Budget Line Item Records				Y	In Primavera Cloud, budget line item records include quantities, rates, hours, production rate, costs, categories, and codes.
Define Total Budget	Y	Y	Y	Y	
Import Budget from Excel				Y	
Workflow for Changes and Transfer Approvals				Y	

Cost Sheet

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Configurable Cost Sheet and Saved Views				Y	
Define and Manage CBS Cost Structure				Y	In Primavera Cloud, you can define workspace, program, and project cost sheets.
Drill-down to Transactions				Y	
Recalculate Cost Sheet Rollups				Y	
View Costs by CBS, Cost Category, or Project				Y	

Cash Flow

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Benefit Plan	Y	Y	Y	Y	
Calculate Financials (NPV, ROI, etc.)				Y	
Calculate Periodic Values Using Curve Profiles				Y	
Capital and Expense Cost Curve Breakdowns				Y	
Forecast Cashflow				Y	

Other Cost Calculations				Y	
Planned Cashflow and Spending Plan	Y	Y	Y	Y	
Stored Snapshots and Comparison				Y	

Actuals

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Manually Add actuals (lump sum or quantity-based)				Y	
Import Actuals from Excel				Y	
Approvals and Workflows				Y	
Consume Funding Sources with Actuals				Y	

Project Funds

P6 and Primavera Cloud both support project funding; however, Primavera Cloud provides broader capabilities to manage the funds. In Primavera Cloud, you can define the funding sources at the workspace, portfolio, or project level. The fund totals are distributed top-down to the projects and fund consumption can be tracked at any level. Due to the difference in capabilities in handling project funds, this data cannot be transferred between P6 and Primavera Cloud.

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Allocate or Assign Funds to Projects	Y	Y	Y	Y	In Primavera Cloud, funds can be defined at the workspace, portfolio, program, or project level.

Consume Funds				Y	In Primavera Cloud, you can track how much of a fund's totals have been consumed by a project.
Define Project-specific Funds				Y	
Import Funds from Excel				Y	
Manually Edit Time-phased Fund Distributions				Y	

Risks

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Apply Activity Uncertainty Calculations to All Activities or Selected Activities				Y	
Assign Configurable Probability and Impact Matrix	Y			Y	
Cause, Effect, and Notes	Y		Y	Y	
Configurable Risk Register and Saved Views				Y	
Configured Fields	Partially Supported	Partially Supported	Partially Supported	Y	
Discussions				Y	

Distribution Results				Y	
Hierarchical Responses with Probability and Impacts	Y				
Manage and View Risks	Y		Y	Y	
Mean Impact Tornado Charts				Y	
Monte Carlo Iteration Analysis				Y	
Monte Carlo Risk Analysis				Y	
Pre and Post Response Thresholds				Y	
Project-specific Risk Matrix				Y	
Response Plans				Y	
Risk Codes	Y			Y	
Risk Removal Impact Tornado Charts				Y	
Risk Workflows				Y	
Run Standard Risk Reports				Y	
Summary Chart	Partially Supported	Partially Supported	Partially Supported	Y	
User-defined Threshold				Y	
Weather Risks				Y	

Issues

Primavera Cloud does not directly support issues, but you can use custom logs for issue tracking.

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Issue Forms	Y	Y	Y		
Manage and View Issue	Y				

Custom Logs

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Apply Templates				Y	Some examples of templates in Primavera Cloud include, Lessons Learned template, Quality Control Sets.
Configurable Views				Y	
Discussions				Y	
Files, Documents, Attachments view and Markups				Y	
Import from Excel				Y	

Documents and Files

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Assign Documents Directly to Activities	Y			Y	

Discussion Threads on Documents and Files				Y	
Document Codes and Other Metadata				Y	
Document Reviews	Y				
File-based Permissions				Y	
Manage and View Project Documents	Y			Y	
Manage and View WPs and Documents	Y	Y	Y		
Project File Repository from Template Folders and Documents				Y	
View any Documents, Markup Tools, Annotations, and Discussions				Y	

Project Integration and Synchronization

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
DOE-CPP Export	Y				
IPMDAR Export	Y	Y	Y		

Monitor Synchronizations	Partially Supported		Y		In P6, synchronizations are managed through Primavera Gateway, whereas in Primavera Cloud, you can manage the synchronizations within the application.
MSP MPX Import/Export		Y	Y		
MSP XML Import/Export	Y	Y	Y	Y	
P6 XML Import/Export (including baselines and scenarios)	Y	Y	Y	Y	
P6 XER Import/Export **Note**: P6 XER format does not support baselines; therefore, projects are exported without baselines in XER format.	Y	Y	Y	Y	

Schedule Synchronizations				Y	In P6, synchronizations are scheduled through Primavera Gateway, whereas in Primavera Cloud, you can schedule the synchronizations within the application.
SDEF		Y	Y	Y	
UNCEFACT Export	Y	Y	Y		

Reports

This section lists the differences in the way Reports are created and managed in P6 and Primavera Cloud. For more information on how Reports are handled in Primavera Cloud, refer to the ***Reports App*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/81822.htm***) section of the Oracle Primavera Cloud Help on Oracle Help Center.

Custom Reporting

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Batch Reports	Y	Y	Y		
Combined Tabular and Graphical Reports	Y			Y	
Create, Manage, and View BI Publisher Reports	Y			Y	
Custom Report Builder		Y	Y	Y	

Integrated User Parameters at Run time	Y			Y	
Output Formats				PDF, XML, XLS, HTML, RTF	
Report on Historical Data				Y	
Word or Excel Templates	Y			Y	

Report Writer

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Save to Standard Reports for Other Users		Y	Y	Y	
User-based Report Writer for Tabular Reports		Y	Y	Y	

Visualizer

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Custom Gantt Chart Reporting		Y	Y		
Timescale Logic Diagrams		Y	Y		
Custom Report Builder		Y	Y	Y	
Batch Reports	Y	Y	Y		

Report Register

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Accessible Within Each App				Y	

Configurable Codes for Reports				Y	
Configurable Register of Reports				Y	
History of Reports Run With Historical and Viewable Content				Y	
Print Layouts (Single Record Forms and Reports)				Y	
Report Templates per Workspace				Y	

Resources and Roles

This section lists the differences in the way Resources and Roles are created and managed in P6 and Primavera Cloud. For more information, refer to the ***Resources App*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/93763.htm***) section of the Oracle Primavera Cloud Help on Oracle Help Center.

Administration

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Define Resource Shifts		Y	Y		
High Level Resource Planning	Y			Y	
Import and Export Resources and Roles	Y	Y	Y	Y	

Resource Teams	Y				
Resources	Y	Y	Y	Y	
Role Teams	Y				
Roles	Y	Y	Y	Y	

Assignment View

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Assignment Gantt	Y				
Assign Resource by Role	Y	Y	Y		
Editable Assignment View	Y	Y	Y	Y	
Future Period Bucket Planning	Y	Y	Y		
Hourly Assignment Spreads		Y	Y		
Multiple Column Sorting	Y	Y	Y	Y	
Rename Columns	Y	Y	Y	Y	
Create Resource or Role Assignments from the Assignment List Page	Y	Y	Y	Y	

Analysis

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Display Usage in Daily Timescale	Y	Y	Y	Y	

Resource Analysis	Y			Y	
Resource Usage	Y	Y	Y	Y	
Role Usage	Y	Y	Y	Y	

Workspaces

This section lists the differences between an EPS in P6 and a workspace in Primavera Cloud . As outlined in the ***Data Organization*** (on page 11) section, both the EPS and the workspace are used to organize your projects in a hierarchical method. The EPS enables you to group projects according to your organization's preferred structure, such as by company division, phase, geography, or project size. The process for grouping and organizing projects and other data objects in Primavera Cloud is performed using workspaces. Similar to the EPS, workspaces organize projects hierarchically according to the structure determined by your organization. For more information, refer to the ***Workspaces*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/88870.htm***) section of the Oracle Primavera Cloud Help on Oracle Help Center.

General

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Configurable Columns	Y	Y	Y		
Configuration Stored per EPS or Workspace				Y	
Defaults, Rules, Metadata per EPS or Workspace				Y	
Gantt View	Y	Y	Y	Partially Supported	In Primavera Cloud, this functionality is available as a chart in workspace dashboards.

Scorecard View	Y	Y			In P6 EPPM Client, this functionality is supported in the Project View.
Template Dictionaries per EPS or Workspace				Y	

Strategies

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Assign and Track Measures				Y	
Assign Codes and Values				Y	
Assign Projects, Weighting, and Scorecards				Y	
Attach Files				Y	
Define Strategy Hierarchy				Y	
Strategy Scorecard				Y	

Create and Import/Export

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Ability to see who is in the project currently	Y	Y	Y		
Check In and Check Out		Y	Y		
Configure Mobile Progress Settings	Y			Y	

Configure Primavera Analytics Settings	Y				
Configure Publication Services	Y				
Create Template Projects	Y	Y	Y	Y	
Export DOE-CPP					
Granular Control Over Data During XML import	Y	Y	Y	Y	
Import and Export Baselines with XML	Y	Y	Y	Y	You can only import up to three baselines while importing P6 XML files into Primavera Cloud.
Import and Export IPMDAR	Y	Y	Y		
Import and Export P3		Y	Y		
Import and Export XER	Y	Y	Y	Y	
Import and Export XLS		Y	Y	Y	XLS import and export in Primavera Cloud is dependent on the subject area or the page that is being imported or exported.
Import and Export XML	Y	Y	Y	Y	

Link P6 Project to Contract Management	Y	Y	Y		
Link P6 Project to Primavera Cloud				Y	
Link P6 Project to Primavera Unifier Primavera Unifier	Y	Y			
Send Project		Y	Y		
UN/CEFACT XML Data Export	Y	Y	Y		

Other

Feature	P6 EPPM Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Define File and Document Repository Templates				Y	
Add Files and Include Document Templates				Y	
Move Workspace to another Workspace				Y	

Users

This section lists the differences in the way user-specific functionalities, such as My Activities, Inbox, News Feed, Preferences, Timesheets are managed in P6 and Primavera Cloud. For more information refer to the ***Users*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/204927.htm***), ***Timesheets*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/166682.htm***), ***My Activities*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/90887.htm***), ***Inbox*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/81780.htm***), ***Notifications*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/84925.htm***), ***Preferences*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/84107.htm***), ***Manage Services*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/151899.htm***), ***Manage Proxy Users*** (***https://docs.oracle.com/cd/E80480_01/help/en/user/98968.htm***) sections of the Oracle Primavera Cloud Help on Oracle Help Center.

General

Feature	P6 Team Member Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Default Landing Page per User Preference	Y				
Getting Started Page with Typical Tasks				Y	
Global Search Across All Objects				Y	
Opens Application in Previous Location				Y	

Timesheets/Status Updates

Feature	P6 Team Member Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Activity Timesheets	Y			Y	
Approve or Reject Timesheets	Y			Y	
My Activities	Y			Y	

Overhead Types/Hour Types	Y			Y	Primavera Cloud enables users to categorize time by creating Hour Types.
Status Update Approvals	Y				
Supervisor Timesheets	Y			Y	
Timesheet Approval Options	Y				P6 EPPM supports autoapproval, one level, and two level of approvals. Primavera Cloud supports only one level of approval.

Other

Feature	P6 Team Member Web	P6 EPPM Client	P6 Professional	Primavera Cloud	Notes
Manage Services	Y			Y	
Monitor Workflows				Y	
News Feed				Y	
Proxy To and From Users				Y	
Task Inbox & Email Notifications				Y	
User Preferences	Y	Y	Y	Y	