

# P6 to Oracle Primavera Cloud Import Guide

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P6 to Oracle Primavera Cloud Import Guide

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# About This Guide

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The purpose of this document is to provide guidance for existing P6 customers that are interested in moving to Oracle Primavera Cloud as a system for managing projects and schedules. The guide explains how to move data from P6 to Primavera Cloud using the native data exchange mechanisms of each tool. This guide is primarily for administrators whose roles include the exporting and importing of projects and project data.

The first stage of the P6 to Primavera Cloud import process is the export of information from P6 to a P6 XML or from P6 Professional to an XML or XER file containing the exported data. Exporting your projects and project data can be performed from the P6 EPPM web application or the P6 Professional desktop client application. Separate help topics are provided for each product. For more information on the export process, see ***Exporting P6 Projects to P6 XML or XER*** (on page 6).

The second stage of the process is the import of projects and project data from the P6 XML or XER file into Oracle Primavera Cloud. Importing your P6 XML or XER file can be performed from the Primavera Cloud web application. A single help topic provides steps for both products. For more information on the import process, see ***Importing P6 XML or XER into Oracle Primavera Cloud*** (on page 9).

In P6 EPPM, the exported XML is referred to as *Primavera XML*. In P6 Professional, the exported XML file is referred to as *Primavera P6 - (XML)* and the exported XER file is referred to as either *Primavera PM - (XER)* or *Primavera Contractor - (XER)*. In Oracle Primavera Cloud, the imported file is referred to as an *XML or XER* file. For the purposes of this guide, the file will be referred to as *P6 XML or XER*, except in the case of application labels that specify a different name.

## Understanding Import vs. Integration

There are several methods available to move data in and out of Primavera Cloud:

- ▶ **Import:** A manual, one-way movement of data from an external file to Primavera Cloud. This guide focuses on importing data.
- ▶ **Integration:** A bi-directional movement of data between an external application and Primavera Cloud. In instances where it is necessary to move information into and out of Primavera Cloud, an integration may be more appropriate. Integrations are not covered in this guide. For more information, see ***Integration Overview*** ([https://docs.oracle.com/cd/E80480\\_01/188655.htm](https://docs.oracle.com/cd/E80480_01/188655.htm)).

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**Note:** Refer to the Oracle Primavera Cloud ***Client System Requirements*** ([https://docs.oracle.com/cd/E80480\\_01/English/client\\_system\\_requirements/204934.htm](https://docs.oracle.com/cd/E80480_01/English/client_system_requirements/204934.htm)) document to review the supported Primavera P6 EPPM versions.

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## Exporting P6 Projects to P6 XML or XER

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To transfer your P6 projects and project data, you must prepare your environment for export and then export the data from your preferred P6 application.

To export P6 project data to a P6 XML or XER file, follow the steps below:

- 1) **Preparing to Export** (on page 6): Check version compatibility, consolidate database instances, and modify data, if necessary.
- 2) Export your data:
  - ▶ **Export P6 EPPM Project Data to P6 XML** (on page 7): Follow these steps if you use the P6 EPPM web application.
  - ▶ **Export P6 Professional Project Data to P6 XML or XER** (on page 8): Follow these steps if you use the P6 Professional desktop client application.

### Preparing to Export

The following items are actions or considerations you should take prior to export to ensure the P6 XML or XER file that is created is viable for use in Primavera Cloud.

- ▶ **Check P6 Version Compatibility:** Confirm that the P6 XML or XER file that will be created is from a supported version of P6. To learn more about supported product versions, consult the *Client System Requirements* document available on **Oracle Help Center** ([https://docs.oracle.com/cd/E80480\\_01/index.htm](https://docs.oracle.com/cd/E80480_01/index.htm)).
- ▶ **Confirm Security Permissions:** In order to perform a P6 XML or XER export, users are required to have either the **Admin Superuser** global security profile, which enables complete access to all global information and all projects, or the **Export Project Data** project security privilege, which grants a user the ability to export projects to which they have access.

The data included in the export process depends on the level of access granted to the user running the export. For example, if a user does not have access to the financial data or resources associated with a project, then the data that is exported will be limited because not all financial data or resources in the project will be accessible. Consider having a user with the **Admin Superuser** profile export the project.

- ▶ **Single P6 Database vs. Multiple P6 Databases:** Depending on your P6 implementation, you may have one or more databases containing projects. If multiple P6 databases exist, and all are being transitioned to Primavera Cloud, it may be beneficial to merge them into a single P6 instance first, and then produce a single, comprehensive export file. While it is possible to import multiple P6 XML or XER files into a single Primavera Cloud instance, more work may be required to align objects such as codes, calendars, and resources.

Prior to exporting from P6, take a thorough inventory of projects you want to import. If multiple P6 databases exist, determine if there is consistency across their respective enterprise data and configurations.

- ▶ **Example 1:** A company has multiple P6 users with separate databases. User 1 may keep track of *Project Sponsor* as a code, while User 2 may also keep track of *Project Sponsor*, but as a user defined field (called a "configured field" in Primavera Cloud). It may be more efficient to align these separate objects before exporting your data.

- ▶ **Example 2:** User 1 and User 2, with their own P6 database instances, each maintain a code called "Site", but they contain unique code values. *Update Existing* is the preferred import option for this scenario. If imported separately, Primavera Cloud will import the values from both instances of P6 into a single code.
- ▶ **Avoid Calendar Conflicts:** Ensure calendars in P6 are uniquely named such that they will not conflict with existing calendars in Primavera Cloud. After importing the calendars, you can reassign and rename them if necessary.
- ▶ **External Project Relationships:** To ensure that external relationships (also called "inter-project" or "cross-project" relationships) are maintained during import, Oracle recommends that you export a single, comprehensive P6 XML or XER file when possible. Exporting a subset of related projects will break any relationships with projects that are excluded from the export.
- ▶ **Field Length Limits:** Primavera Cloud supports code fields up to 60 characters and user defined fields (UDFs) up to 30 characters. List UDFs are supported up to 128 characters.

## Export P6 EPPM Project Data to P6 XML

Export your P6 EPPM projects and project data to a P6 XML file for use in Oracle Primavera Cloud. After the file is created, you can download it from the P6 EPPM web application and import it into Primavera Cloud.

To export P6 EPPM projects to P6 XML:

- 1) In **P6 EPPM**, select **Projects**.
- 2) On the **Projects** navigation bar, select **EPS**.
- 3) On the **EPS** page, select the **Actions** ▼ menu, and then select **Import/Export Projects**.
- 4) In the **Import/Export Projects** dialog box, select the **Export** tab.
- 5) In the **Export Type** field, select **Primavera XML**.
- 6) Select **+ Add Project...**
- 7) In the **Select Project** dialog box, select one or more projects that you want to export, and then select **Select**.
- 8) In the **Import/Export Projects** dialog box, review the list of selected projects and remove any that you do not want to export.

**Note:** The **Import/Export Projects** dialog box contains the option to include project baselines in the export.

- 9) Select **Export**.  
The export job is submitted.

### Tips

- ▶ You can view the status of the export in the **View Service Status** dialog box.
- ▶ You can download the completed P6 XML file in the **View Service Status** dialog box or **Notifications** dialog box.
- ▶ The P6 XML file name reflects the name of the project you exported or the first project in the list if you exported multiple projects.

## Export P6 Professional Project Data to P6 XML or XER

Export your P6 Professional projects and project data to a P6 XML or XER file for use in Oracle Primavera Cloud. After the file is created, you can download it from the P6 Professional desktop application and import it into Primavera Cloud.

Before running the export process, you should determine if you are connected to a P6 Professional database (PPMDB schema) or a P6 EPPM database (PMDDB schema). Depending on your database, some aspects of the export process may differ. In P6 Professional environments with a P6 Professional database, the export process runs locally on your machine. In environments with a P6 EPPM database, the export process runs as a remote job service from P6 EPPM. Additionally, if you have a P6 Professional database, you can export and then open the P6 XML or XER file from a location on your machine. If you have a P6 EPPM database, you can download the file from the Job Status dialog box after the job is complete. The steps below describe the export process for both database types.

To export P6 Professional projects to P6 XML or XER:

- 1) In **P6 Professional**, open the projects you want to export.
- 2) On the **File** menu, select **Export**.
- 3) In the **Export Format** dialog box, select **Primavera P6 - (XML)** or **Primavera PM - (XER)**.
- 4) Select **Next**.
- 5) In the **Projects to Export** section, select which open projects you want to export.

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### Notes:

- The **Projects to Export** section contains the option to include project baselines in the export.
  - P6 Professional does not support exporting project baselines in XER file format.
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- 6) Select **Next**.
- 7) Do one of the following:
  - a. If you are using a **P6 Professional** database:
    1. In the **File Name** section, select a destination and name for your P6 XML or XER file.
    2. Clear the **Export all project level layouts** check box.
    3. Select **Finish**. After the export completes, the file is available from the destination you chose.
  - b. If you are using a **P6 EPPM** database:
    1. The **Project Layouts** section contains an option to export all project-level layouts. Choosing to export project-level layouts will export your selection of projects as a .zip file. During the import, Primavera Cloud will ignore layouts included in the .zip file since it does not support import of P6 Professional layouts.
    2. Select **Finish**. The job is scheduled for export.
    3. In the **Export Result** dialog box, select **Close**.
    4. On the **Tools** menu, select **Job Status**.



5. The **Job Status** dialog box displays all jobs that have been scheduled. Locate your export job. When the job is complete, select **Download File**.

### Tips

- ▶ The Job Name and file name reflect the name of the project you exported or the first project in the list if you exported multiple projects.
- ▶ If you attempt to download the file and nothing happens, you or your administrator should consult the following support document to resolve the issue: **Oracle Support Document 2130400.1** (<https://support.oracle.com/epmos/faces/DocumentDisplay?id=2130400.1>).
- ▶ When connected to a P6 EPPM database, your administrator must enter the URL of the content repository into the P6 URL field on the **General** page of the **Application Settings** in the P6 web application.

## Importing P6 XML or XER into Oracle Primavera Cloud

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### Importing Projects from P6 Video

Using a P6 XML or XER file, you can import P6 projects and project data into your Oracle Primavera Cloud environment. Before importing, you should understand the details of the import process and follow steps to prepare for the import. After the import, you should confirm the accuracy of your imported data.

To import P6 XML or XER data into Oracle Primavera Cloud, follow the steps below:

- 1) **Import Objects** (on page 10): Identify enterprise and project data that can be imported into Primavera Cloud using the P6 XML or XER format.
- 2) **Import Actions** (on page 21): Learn how projects and project data are handled when they are imported into the application. You can take different actions depending on whether you want to create new projects, update an existing project, or ignore an incoming project. You can also select alternate actions in the event that incoming data conflicts with existing data.
- 3) **Preparing to Import** (on page 24): Complete this set of actions to ensure that your environment is prepared to import projects.
- 4) **Import P6 XML or XER Data into Oracle Primavera Cloud** (on page 25): Use the Primavera Cloud web application to import your project data.
- 5) **Post-Import Steps** (on page 28): Complete this set of actions to ensure that the data you imported is accurate and complete.

## Import Objects

P6 XML and XER files exported from a P6 application contain P6 projects and their associated data. Only objects, values, and definitions that are explicitly assigned to projects or their activities are included in the P6 XML or XER file. This includes the parent hierarchy of applicable objects, such as resources or roles. If data in P6 is not assigned to or associated with an exported project, it will not be included in the P6 XML or XER file. You cannot use the import method to transfer entire P6 dictionaries such as resources, roles, risk matrices, and risk thresholds.

**Note:** XER refers to Oracle Primavera Proprietary Exchange Format (XER). It is a proprietary file format used by the P6 EPPM application.

The sections below list the P6 data objects that are importable or nonimportable by the P6 XML and XER import functionality in Primavera Cloud.

### Importable Data

Importable data is separated into Workspace-level Data and Project-level Data lists, which identify where each object is stored in Primavera Cloud. Workspace-level data that is assigned to an exported 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. In general, importable workspace-level data consists of P6 Enterprise Data such as calendars, codes, and UDFs, which can be assigned to child workspaces and projects within a workspace. Importable project-level data contains project-specific objects such as activities, resource assignments, risks, and the WBS. When an object is imported, its associated data is also included. For example, each activity that is imported includes its dates, durations, units, costs, types, code values, configured field values, and resource assignments.

The names and storage locations of data objects in Primavera Cloud may be different than in P6. For example, user defined fields (UDFs) in P6 are called "configured fields" in Primavera Cloud. P6 Enterprise Data like Project activity codes types and project calendars are imported and stored at the project level. These types of differences are included below.

You can set individual import actions for each project in the XML or XER file and most of the data objects listed below. Not all of the items below are listed in the application's import tool. Unless otherwise stated, subordinate items that are not listed in the application take the import action of their parent.

### Importable Workspace-level Data

Object	Type	Notes
Calendars	Global Calendars Resource Calendars	

Codes (and Code Values)	Activity Project Resource	<p>Codes marked as <b>Secure</b> in P6 are importable, but there is no such designation in Primavera Cloud.</p> <p><b>EPS</b> and <b>Global</b> activity codes are imported to the workspace level. <b>Project</b> activity codes are imported to the project level.</p> <p>The import action for codes does not only apply to the workspace in which the projects are imported. Using the <i>Update Existing</i> import action on codes has the potential to update existing defined values as high as the root workspace.</p> <p>In P6, codes are exclusive to their respective object types. In Primavera Cloud, a code can be applied across multiple object types.</p>
Configured Fields (called "user defined fields" (UDFs) in P6)	Activity Configured Fields Assignment Configured Fields Project Configured Fields Risk Configured Fields WBS Configured Fields	<p>You can only import Project configured fields with a <b>Type of Manual</b>.</p> <p>Imported configured field names must begin with a letter. Names cannot contain spaces, reserved words, multi-byte characters, or special characters except for an underscore.</p>
Curves (called "Resource Curves" in P6)		

Resources and Roles	Resource and Role Availability Resource and Role Rates Resource Code Assignments Resource/Role Associations	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. Each resource or role's parent hierarchy is also imported and stored in the project's parent workspace so that their hierarchical structure is maintained.  Roles in Primavera Cloud must have unique IDs. To successfully import roles into Primavera Cloud, ensure that the role IDs being imported from P6 are all unique.
Risk Threshold and Matrix Templates	Risk Threshold Levels Risk Thresholds Risk Matrix Risk Matrix Scores Risk Matrix Thresholds	The cost threshold, schedule threshold, and probability threshold associated with a risk matrix template must be included in the XML import in order for the risk matrix template to import successfully.  P6 Professional does not support risk matrix, so risk threshold and matrix templates are not imported with an XER file import.
Units of Measure		

### Importable Project-level Data

Object	Type	Notes
Activities	Activity Details Calendar Assignments Code Assignments Configured Field Assignments Notebook Topics WBS Summary Activities	<b>EPS</b> and <b>Global</b> activity codes are imported to the workspace level. <b>Project</b> activity codes are imported to the project level.

Project	<p>Baselines                  Scenarios                  Code Assignments                  Configured Field Assignments                  Project Default Calendar Assignment                  Project Settings                  Scheduler Settings</p>	<p>Baselines and scenarios are selected when setting import actions for the projects in the XML file. You can import up to three baselines or scenarios per project. You can also choose to import only baselines or scenarios and no other project data for existing projects in the application, or you can choose to import only baselines or scenarios as new projects.</p> <p>Baseline types (baseline categories in Primavera Cloud) are also imported as part of baseline data if assigned to baselines and selected for import.</p> <p>Baselines are excluded while importing a P6 XER file as the XER format does not support baselines or baseline types. Baselines and baseline types can only be imported with the P6 XML import.</p> <p>Project code and configured field assignments follow the import actions for project codes and project fields in Workspace-level Data.</p> <p>Project settings, scheduler settings, and a project's default calendar assignment are automatically included with each imported project. If the calendar in the XML file is not found in Primavera Cloud and is not added to Primavera Cloud as part of the import process, the workspace default calendar will be set as the project default calendar.</p>
Project Calendars		
Relationships		

<p>Resources and Roles</p>	<p>Activity Assignments                      Assignment Calendars                      Assignment Configured Field Assignments                      Assignment Costs and Units                      Assignment Rates</p>	<p>Primavera Cloud lists "Resources and Roles" as an importable item at the project level. This item 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. Each resource or role's parent hierarchy is also imported and stored in the project's parent workspace so that their hierarchical structure is maintained.</p> <p>If you frequently export and import data, either to Primavera Cloud or P6 EPPM, a resource or role's availability and rate values should be identical at the workspace and project levels. Resource and role values are imported at the workspace level only. If a project-level resource or role is created as part of the import, it will use the values that exist at the workspace level. Existing project-level availability and rate values will not be overwritten. If you want to update project-level availability and rate values, you should do so manually.</p> <p>Before importing an XER file into Primavera Cloud, ensure the decimal symbol setting for currency values in P6 is set to dot(.) instead of comma(,).</p> <p>If the base currency of an XER file differs from Primavera Cloud's base currency during import, then Primavera Cloud will convert the currency type while preserving the same relative value. For example, 100€ in P6 will be displayed as \$100 in Primavera Cloud. You can view the currency differences in the Import Log on the <b>Manage Services</b> page.</p>
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Risks	Activity Assignments Configured Field Assignments Probabilities and Impacts Matrix Scores Response Actions Response Action Impacts Response Plans Risk Matrix and Thresholds Project Assignment	Primavera Cloud supports a single response plan for each risk. Only response actions under an active response plan will be included in the XML or XER file.  The lowest response action impact values under each active response plan will be imported and stored as post-response values at the risk level.
Work Breakdown Structures (WBS)	Configured Field Assignments	

### Nonimportable Data

The data that cannot be imported into Primavera Cloud is divided into two categories:

- ▶ **Nonimportable but supported in Primavera Cloud:** This is the data that cannot be imported into Primavera Cloud but the functionality is supported.
- ▶ **Nonimportable and not supported in Primavera Cloud:** This is the data that cannot be imported into Primavera Cloud and the functionality is also not supported.

### Nonimportable Data Supported in Primavera Cloud

The P6 data listed below cannot be imported into Primavera Cloud, 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.

Object	Type	Notes
Application Settings		
Budget Approval Details		
Budget Approvals		

Budget Change Details		
Budget Changes		
Budget Transfer Details		
Budget Transfers		
Cost Breakdown Structure (CBS)		
Currencies		
Dashboards		
Discussions		
Documents		
Filters		
Financial Periods		
Funding Sources		
Layouts (unique to P6 Pro)		Views in Primavera Cloud provide much of the same functionality as layouts, although they are not functionally equivalent
Discussions		
Documents		
Filters		
Financial Periods		
Funding Sources		



Layouts (unique to P6 Pro)		Views in Primavera Cloud provide much of the same functionality as layouts, although they are not functionally equivalent
Locations		Locations can be added manually or transferred to Primavera Cloud using an integration method.
Owner		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 Resource Allocations		
Reports		
Resource and Role Rate Types		
Scheduled Services		You can manually run Import, Export, Level, and Schedule jobs in Primavera Cloud.
Stored Images		Primavera Cloud enables users to upload photos and associate them with workspaces, projects, and other objects.
Tasks		Tasks can only be transferred from Primavera Cloud to P6.
Timesheet Data		

Timesheet Periods		
User Interface Views		
User Preferences		
Users		
Views		
WBS Spreads		WBS spread data can be added manually or transferred to Primavera Cloud using an integration method.

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**Nonimportable Data Not Supported in Primavera Cloud**

The P6 functionality and data listed below cannot be imported, and there is no functional alternative supported by Primavera Cloud.

<b>Object</b>	<b>Type</b>	<b>Notes</b>
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		
Global Security Profiles		

Issues		
Organizational Breakdown Structure (OBS)		
Overhead Codes		
Performance Thresholds		
Project Planning Resources		
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	<p>Documents</p> <p>Expenses</p> <p>Issues</p> <p>Resources</p> <p>Steps</p> <p>Project UDFs with a UDF Type of <b>Formula</b></p> <p>UDFs with a Data Type of <b>Indicator</b></p>	

Visualizer		
WBS Categories		
WBS Expense Spreads		
WBS Milestones		
WBS Resource Spreads		

### Object Matching

During the import, Primavera Cloud checks each imported object to see if it shares an ID with any related objects already present in the database. The following fields are used to identify matches, per object:

<b>Object</b>	<b>Fields used to determine match</b>
Activity	Activity ID
Calendar	Calendar ID
Code	Code ID
Curve	Curve Name
Relationship (single-project)	Predecessor Activity ID, Successor Activity ID, Relationship Type
Relationship (multi-project)	Predecessor Project ID, Predecessor Activity ID, Successor Project ID, Successor Activity ID, Relationship Type
Resource Assignment	Activity ID, Assignment ID, Resource ID, Role ID
Risk	Risk ID
Risk Matrix	Risk Matrix Name
Risk Threshold	Risk Threshold Name, Risk Threshold Type
Resource	Resource ID
Role	Role ID
UDFs (matched to Configured Fields)	Column Label, Data Type
WBS	WBS Code

## Import Actions

When you **import a project** (see "**Import P6 XML or XER Data into Oracle Primavera Cloud**" on page 25) from a P6 XML or XER file, Oracle Primavera Cloud gives you the option create a new project, update an existing one, update the selected baselines and scenarios only, or skip importing a project. When importing a P6 XML or XER file containing multiple projects, you can set separate import actions for each project by specifying the import actions in the Import File step of the Import from P6 wizard. You can also specify the import actions and conflict actions for the imported workspace or project data objects in the Configuration step. The conflict actions are the actions the application takes when multiple matches are found for the same object.

Before you begin the import process, you must specify the target workspace into which the projects will be imported.

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**Note:** XER refers to Oracle Primavera Proprietary Exchange Format (XER). It is a proprietary file format used by the P6 EPPM application.

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### Project Import Actions

Specify the import actions for each project and its baselines and scenarios in the P6 XML or XER file in the Import File step of the Import from P6 wizard.

- a) **Current Schedule:** Select one of the following actions for each project included in the file:
- ▶ **Create New Project:** The project data is used to create a new project in Primavera Cloud. If the project already exists in the current workspace, the project will be imported into the target workspace with a numeric value appended to its project ID.
  - ▶ **Update Existing Project:** The project data is used to update an existing Primavera Cloud project. This option is only available if a project with a matching project ID is found in the current workspace.
  - ▶ **Update Selected Baselines or Scenarios Only:** The baselines or scenarios that you select for an existing project are updated in Primavera Cloud. The rest of the project data is ignored and is not imported.

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**Note:** When you select **Do Not Import** for a project, the project data is ignored and is not imported into Primavera Cloud. Global calendars assigned to the project will not be imported.

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- b) **Baseline:** For each baseline, specify if you want to create a new baseline or update an existing one, and then select the project with which the baseline should be imported and specify the baseline name.
- c) **Scenario:** For each scenario, specify if you want to create a new scenario or update an existing one, and then select the project with which the scenario should be imported and specify the scenario name.

Data that can be imported from P6 includes objects stored at the Enterprise Data level and the project level. Most Enterprise Data in P6 is stored as workspace-level data in Oracle Primavera Cloud, although some project-specific data may be stored with the project. Workspace-level data is shared among the projects, child workspaces, and other objects in the workspace.

**Note:** Projects created in Primavera Cloud through P6 XML import have their project currency set to the parent workspace currency by default.

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## Workspace and Project Data Import Configuration Actions

You can set separate import actions for each workspace and project data type, providing greater control over the data that gets imported. You also have the ability to specify the action that the application takes when an object in the P6 XML or XER file already exists in Oracle Primavera Cloud or when multiple matching objects are found in sibling workspaces. Your import configuration settings can be saved and used the next time you run the import process.

## Workspace Data Import Configuration Actions

Data objects in Oracle Primavera Cloud must be unique within each workspace hierarchy branch. During the import process, the application searches up and down the hierarchy of the target workspace to determine whether matching workspace objects already exist in the application. Workspace data import settings specify the action that is taken when a matching object is found in the application. Matching objects found in other workspaces in the hierarchy may need to be assigned or promoted to the target workspace to maintain existing data associations. Changes to an object's owning workspace are detailed in the list of import actions below. Separate import actions can be chosen for each workspace data type. The selected actions apply to all projects being imported from the P6 XML or XER file.

When configuring the workspace data import settings, you can choose from the following import actions:

- ▶ **Insert New:** If a matching object is found, the object will be inserted into the target workspace as a unique record by appending a numeric value to the object. If no matching object is found, the object will be created as new.
- ▶ **Update Existing:** If a matching object is found in the target workspace, its owning workspace will remain the same and the object will be updated based on the data from the import file. If a matching object is found in a higher-level workspace, its owning workspace will remain the same, but an association will be created with the target workspace. The object will not be updated because objects can only be updated from their owning workspace. If a matching object is found in a lower-level workspace, the application will attempt to promote its owning workspace to the target workspace and create an association with the workspace where the object was found. The promoted object will be updated based on the data from the import file. If no matching object is found, the object will be created as new.
- ▶ **Keep Existing:** If a matching object is found at any level, the existing object will be kept and its data will not be updated. If the matching object is found in the target workspace, its owning workspace will remain the same. If the matching object is found in a higher-level workspace, its owning workspace will remain the same, but an association will be created with the target workspace. If the matching object is found in a lower-level workspace, the application will attempt to promote its owning workspace to the target workspace and create an association with the workspace where the object was found. If no matching object is found, the object will be created as new.
- ▶ **Do Not Import:** The data type is ignored and is not imported. However, if a matching object is found, it will be kept as existing and any associated data (such as resource assignments) will be imported.

**Note:** To ensure codes are imported consistently, all workspace code types are imported with the same import action. If you change the import action for one workspace code type, Oracle Primavera Cloud automatically changes the import action for all other code types. This is necessary because workspace codes in Primavera Cloud can be associated with multiple object types, so allowing different actions for different code types may interfere with new and existing codes.

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## Conflict Actions

When importing a workspace data type using *Update Existing* or *Keep Existing*, the application automatically attempts to promote any matching object found in a lower-level workspace and create an association with the workspace where the object was found. Conflicts may occur if multiple matches of the same object are found in sibling workspaces. Promoting one of the matching objects to a common parent workspace will violate the application's hierarchy uniqueness requirements and cannot be done. In these scenarios, you can select alternate actions during import configuration to resolve potential promotion conflicts. A conflict action can be set for each workspace data type:

- ▶ **Insert New:** The matching object will be inserted into the target workspace as a unique record by appending a numeric value to the object.
- ▶ **Fail Import:** If a promotion fails, the import process will fail immediately and no data will be imported.
- ▶ **Do Not Import:** The matching object is ignored and is not promoted or imported.

Separate conflict actions for each data type provide greater control over your imported data. For example, you may want to insert as new any matching calendars found in a lower level, but prevent the insertion of matching resources. You can set resource objects to fail the import, enabling you to manually resolve uniqueness conflicts before running the import again.

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### Notes:

- Because configured fields must be unique across the application for each object type, they do not support promotion or conflict actions. The conflict action is set to *Not Applicable* for configured fields.
  - All code conflict actions are set to the same option during the import process.
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## Project Data Import Configuration Actions

You can configure the action that is taken for each project data type imported with a project. The selected actions apply to all projects being imported from the P6 XML or XER file.

When configuring the project data import settings, you can choose from the following import actions:

- ▶ **Update Existing:** If a matching object is found in the project, it will be updated based on data from the import file. If no matching object is found, the object will be created as new.
- ▶ **Keep Existing:** If a matching object is found in the project, it will be kept and its data will not be updated. If no matching object is found, the object will be created as new.

- ▶ **Do Not Import:** The data type is ignored and is not imported. However, if a matching object is found, it will be kept as existing and any associated data will be imported.

For activity, relationship, and resource and role data types, select **Remove from Projects** to remove an object from the project if the object does not exist in the P6 XML or XER file. This ensures that a project being updated is consistent with the data in the P6 XML or XER file.

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**Notes:**

- WBS Name and ID values must be individually unique among all siblings at each hierarchical level. On import, WBS ID values are checked for uniqueness and updated according to the import action selected for WBS data. If a WBS Name conflict occurs, the matching object will be inserted into the WBS hierarchy with a numeric value appended to the WBS Name. Project Baselines that are imported as baselines from P6 XML are imported with baseline categories included, if they have been assigned.
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## Preparing to Import

The following items are actions or considerations you should take prior to import to prepare your Primavera Cloud environment.

- ▶ **Establish Workspace Hierarchy:** Ensure that your Primavera Cloud workspace hierarchy has been established. If your P6 EPS/OBS hierarchies were effective, you may choose to recreate that setup. To get started, see "Workspaces Overview" in the *Oracle Primavera Cloud Help*.
- ▶ **Confirm Security Permissions:** In order to perform a Primavera Cloud P6 XML or XER import, users are required to have either the **Application Administrator** privilege or all of the following privileges:
  - ▶ **Workspace** permissions: Enable Import Project, Add Projects.
  - ▶ **Project** permissions: Edit Project.

The **Import Project** privilege temporarily overrides individual shared data privileges during the import process, enabling users to create the shared data required by the imported projects.

- ▶ **Create Configured Fields:** Called "user defined fields" in P6, configured fields contain data specific to your organization.
- ▶ **External Project Relationships:** All projects selected during import are imported into the same workspace. To ensure that external relationships (also called "inter-project" or "cross-project" relationships) are maintained during import, Oracle recommends that you import all desired projects at the same time. After they have been imported into Primavera Cloud, projects can be moved to their appropriate workspaces.



- ▶ **Predefined Configuration Elements:** When a new Primavera Cloud instance is established, it is prepopulated with a selection of configuration elements to expedite the setup of the application. This includes prepopulated dictionary items like calendars, codes, and roles. It is recommended that you familiarize yourself with these elements prior to import to ensure there will be no potential conflicts between the existing configuration objects and any objects that will be imported. Most preexisting configuration elements are located in the root, Production, and Non-Production workspaces.
- ▶ **Check the P6 XML File Size:** The maximum file size that you can import is 1 GB. If the P6 XML or XER file exceeds this size, the original export may need to be broken down into multiple smaller files.
- ▶ **Recommended Settings:** There is no single set of recommendations that is appropriate for every possible import situation. Each user's environment contains many variables that can affect the outcome of the import process, including the number and size of P6 databases from which the P6 XML or XER data is sourced, the number of P6 instances the user has, the number of matches between P6 data and existing Primavera Cloud data, and whether all P6 projects are imported together or separately. While each scenario is different, the *Update Existing* import action generally provides the best overall results.

## Import P6 XML or XER Data into Oracle Primavera Cloud

Import P6 data from a P6 XML or XER file into your Oracle Primavera Cloud environment. For each project included in the file, you can specify whether you want to create a new project, update an existing project, update the selected baselines or scenarios of the project, or skip importing the project. For projects you choose to import, you can specify how individual workspace and project object types are imported into the application. When the import is complete, you can view a log file to see the results of the process. Before you import a project, ensure you have the required workspace security privileges to import and add a new project into the workspace and the required project security privilege to edit existing projects.

The P6 XML and XER import process supports a variety of P6 data objects and import actions for transferring your data to Primavera Cloud. Each import action has its own set of rules to describe how your data is impacted during the process. Refer to the P6 XML/XER Import Objects and P6 XML/XER Import Actions topics for detailed information on import objects and actions.

This topic describes the import process and the project import actions in the *Import From P6* wizard. The import process includes two main steps:


- 1) **Import File:** In this step, choose the file to import and specify the project import actions and import details.
- 2) **Configuration:** In this step, for the projects you selected to import, specify how individual workspace and project object types should be imported into the application. You can also specify conflict actions, that is, the actions to take when multiple matches are found in the application for the same kind of data.

### Before You Begin

- ▶ If you are importing an XER file into Primavera Cloud, ensure the decimal symbol setting for currency values in P6 is set to dot(.) instead of comma(,).

- ▶ If you use the Standard Data Exchange Format (SDEF), use the SDEF conversion utility to convert your SDEF files to XER before importing them to Primavera Cloud. To learn how to convert SDEF files to XER, see My Oracle Support article (DOC ID: **902710.1** (<https://support.oracle.com/epmos/faces/DocumentDisplay?id=902710.1>)).

To import project data from a P6 XML or XER file:

- 1) In the object selector, select  **Projects**, and then select **View All Projects**.
- 2) In the **Projects** inventory panel, in the workspace tree, select a destination workspace for the imported project.

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**Notes:**

- You must be within the context of the workspace where you want to import the file. Selecting a workspace name in the grid will not change the workspace context.
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- 3) Select **Actions** ▼, and then select **Import from P6**.
- 4) In the **Import From P6** wizard, complete the following steps:
  1. In the **Import File** step, in the **Select an XML or XER File** field, select a file to import.
  2. (Optional for XER) From the **Locale** drop-down list, select your preferred locale (language), if the locale setting in Primavera Cloud does not match your browser language setting.

Selecting the appropriate locale encodes and preserves the content from the XER file while importing it.

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**Note:** You can upload a valid P6 XML or XER file, or, for faster performance, upload a compressed file containing the P6 XML or XER file. Uploading multiple P6 XML or XER files within a compressed file is not supported. The maximum file size that you can import is 1 GB.

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3. In the **Project Import Actions** section, specify an **Import Action** for each project (current schedule) and any baselines and scenarios in the file.
  - a. **Current Schedule:**
    - **Import As:** Select either **Project**, **Baseline**, **Scenario**, or **Do Not Import**.
  - b. **Baseline:**
    - **Import with Project:** Select the check box to indicate whether you want to import the baseline along with the project.
    - **Import As:** Select either **Baseline**, **Scenario**, **Project**, or **Do Not Import**.
  - c. **Scenario:**
    - **Import with Project:** Select the check box to indicate whether you want to import the scenario along with the project.
    - **Import As:** Select either **Baseline**, **Scenario**, **Project**, or **Do Not Import**.
4. In the **Import Details** panel, depending on your chosen import option for current schedule, specify its import details.
  - **Project:** Select to create a new project, update an existing one, or update the selected baselines or scenarios only, and then specify the project ID.

- **Baseline:** Select to create a new baseline or update an existing one, and then select the project with which the baseline should be imported and specify the baseline name.
- **Scenario:** Select to create a new scenario or update an existing one, and then select the project with which the scenario should be imported and specify the scenario name.
- **Do Not Import:** The project will not be imported.

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**Notes:**

- Because of differences in how data is managed in P6 and Primavera Cloud, you cannot revert changes made to a baseline if that baseline was imported from a P6 XML file.
  - Baseline categories can only be imported using P6 XML. This allows you to migrate projects and project baselines from P6 while retaining any categories that might be assigned, and to make them available to assign to other baselines in the workspace. A baseline must be imported as a baseline for baseline categories to migrate successfully. Users must have the workspace level Import XML privilege to import objects.
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5) Select **Next**.

6) In the **Configuration** step, complete the following steps:

I. In the **Workspace Data** section, specify the following for each item:

- **Import Action:** Select an import action for each workspace item.
- **Conflict Action:** Select an alternate action to take when multiple matches are found in the application.

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**Notes:**

- Because configured fields must be unique across the application for each object type, they do not support promotion or conflict actions. The conflict action is set to *Not Applicable* for configured fields.
  - Because workspace-level codes can be associated with multiple object types, importing code types with different import actions may interfere with new and existing codes. For example, assume an existing code is associated with both activities and resources. Choosing to insert new activity codes and update existing resource codes may cause unintended changes to the existing code. To prevent these unintended changes, all workspace-level code import actions and conflict actions are synchronized during the import process. This ensures that all codes are imported consistently.
  - Conflict action options are available for workspace data items with an import action of *Update Existing* or *Keep Existing*.
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2. In the **Project Data** section, specify the following for each item:

- **Import Action:** Select an import action for each project item.

- **Remove from Projects:** Select this option to remove objects in Oracle Primavera Cloud that do not exist in the P6 XML or XER file. This option is available for the activities, relationships, and resources and roles project data items.

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**Note:** Configuration options of projects do not apply to baselines and scenarios. If baselines or scenarios are selected to be imported, the data is automatically updated during the import.

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7) (Optional) Select **Save Configuration** to retain these settings for future use.

8) Start the import process:

a. Select **Finish**.

b. In the inventory panel, select **✕ Close**.

After the import process completes, you can review the import log to view data and statistics about the process, as well as any errors encountered that need to be resolved. You can access the import log from the system notification you receive when the process is complete or from the **Manage Services** page.

9) Reschedule the project and recalculate costs before making any project updates.

## Differences Between XML and XER File Import

The XML and XER file import process is the same in Primavera Cloud; however, the following objects cannot be imported through XER file import.

- ▶ Risk Impact
- ▶ Risk Response Plans and Actions
- ▶ Risk Response Action Impact
- ▶ Risk Matrix
- ▶ Risk Thresholds Levels
- ▶ Risk Thresholds
- ▶ Risk Matrix Scores
- ▶ Risk Matrix Thresholds
- ▶ Baselines
- ▶ Baseline Types

## Post-Import Steps

After the import process has completed, consider following the steps to check that your data was imported successfully, accurately, and completely. Depending on your needs, some steps may be optional.

- 1) **Import Log Review:** You can access the import log from the system notification you receive when the process is complete, from the **Inbox** page, or from the **Manage Services** page.
- 2) **Adjust Imported Workspace Data:** In the workspace Summary & Settings, adjust the following options as appropriate:
  - ▶ **Sharing Method:** The sharing method of dictionary items is set to *Manual* by default. If set to *Automatic*, all new child workspaces will automatically inherit the item.

- ▶ **Adjust Calendar IDs:** When imported, calendars are assigned unique ID numbers. Depending on your preferences, you may want to assign them more meaningful IDs.
- 3) **Adjust Imported Project Data:** In the project Summary & Settings, adjust settings on the following pages as appropriate:
    - ▶ **Details:** The user who imported the project is assigned as its manager. You can select a different user as the manager, if necessary.
    - ▶ **Settings:** Review all tabs to ensure accurate settings.
  - 4) **Modify Activity Owners:** The user who imported the project is assigned as the owner of each activity in the project. You can select a different user if necessary.
  - 5) **Baseline the Project:** Oracle recommends that you create a new baseline of each imported project immediately after the import is complete. This preserves the initial condition of the imported projects for reference purposes.
  - 6) **Manually Review Data:** Compare your source data in P6 with your imported data in Primavera Cloud to ensure accurate values. This may include dates, durations, relationships, assignments, and calculated fields. Also compare the quantity of objects such as the total number of activities, resources, relationships, and resource assignments in a project. You may need to adjust date, time, and number units in your user preferences before comparing data.
  - 7) **Schedule the Project:** When P6 project data is imported 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.
  - 8) **Recalculate Costs:** Because of differences in how costs are calculated in P6 and Primavera Cloud, you should recalculate costs after importing.
  - 9) **Manually Review Data:** After the project is scheduled, 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 rates between the workspace and project levels in Primavera Cloud may occur when importing into P6.
  - 10) **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.
  - 11) **Begin Using Primavera Cloud to Manage Your Project:** With your project imported, reviewed, and baselined, you may now proceed with updating your project schedule.