Oracle
Primavera Cloud
Integration Using Zapier

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Oracle Primavera Cloud Integration Using Zapier

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About This Guide

This guide explains how to integrate Oracle Primavera Cloud with third-party applications using Zapier.

Oracle Primavera Cloud Integration using Zapier Overview

Connect Oracle Primavera Cloud to hundreds of other applications using Zapier. Quickly automate Primavera Cloud integrations with Zapier's templates. Use Zapier to share task data between Primavera Cloud and third-party applications, enabling you to combine the functionality and features of different applications to meet all your project needs.

Automated connections called *zaps* can automate your day-to-day tasks and build workflows between apps. Each zap has one app as a trigger and another where the actions occur. The *trigger* is where your information comes from. It causes one or more *actions* in other apps, where your data is sent automatically.

For more information, see the ***Oracle Primavera Cloud Integrations*** (***https://zapier.com/apps/oracle-primavera-cloud/integrations***) page on the Zapier website.

Get Started with Oracle Primavera Cloud Integration using Zapier

Oracle Primavera Cloud Task Management can utilize Zapier zaps to send important task information to third-party applications. These third-party applications are often used by subcontractors who need to participate in the task management process in Primavera Cloud.

Complete the following configuration steps to get started with the Zapier integration:

Create and Configure a Primavera Cloud Trigger

Triggers are events that start a zap and are used to begin an action in a third-party application. Triggers start an automated process when certain fields are updated or newly created in Primavera Cloud. See ***Create and Configure an Oracle Primavera Cloud Trigger*** (on page 7) for more information on creating and configuring a trigger.

Create and Configure a Third-Party Application Action

An action is an event that a zap performs. Actions are the results of a trigger being activated. They send new data to other third-party applications and cause new items to be created or updated in that application. See ***Create and Configure a Third-Party Application Action*** (on page 8) for more information on creating and configuring an action in a third-party application.

Primavera Cloud Task Management Use Case for Templates and Triggers

Oracle Primavera Cloud can use Zapier zaps to send task information to third-party applications that facilitate the participation of subcontractors in the task management process.

Templates and Triggers

An Oracle Primavera Cloud integrations plug-in is available in Zapier. This plug-in includes three templates and three triggers. The templates are pre-configured with the triggers and include the required field mappings. Templates can be used as-is or updated as needed for your integration. The triggers include the following:

▶ New (First) Commitment: Triggers when a task is first committed
▶ Updated Commitment: Triggers when any attribute of a committed task is updated
▶ Updated Committed Task: Triggers when a task is recommitted

Use Case

Triggers are used to begin an action in a third-party application, such as Assignar. Assignar is a tool available to contractors and subcontractors and is used to manage workforce, compliance, and pay rates. By using zaps to send information to Assignar, Primavera Cloud can share task information with subcontractors and general contractors when certain workflows are completed within Primavera Cloud.

The following table lists the various Primavera Cloud use cases which can trigger an action in Assignar, along with the corresponding field mappings.

Templates	Trigger	Primavera Cloud Use Case	Assignar Action	Assignar Action Mappings
Template 1	New (First) Commitment	A commitment is made on a task for the first time in Primavera Cloud.	The Assignar user accepts the assignment and creates a new work order.	New Work Order and New Journal Entry
Template 2	Updated Commitment	A task is recommitted in Primavera Cloud.	The Assignar work order is updated with new or updated information from Primavera Cloud when a task is recommitted.	New Journal Entry
Template 3	Updated Committed Task	Any attribute of a committed task is updated in Primavera Cloud.	The Assignar work order is updated with updated task information for the committed task.	Update Work Order

Create and Configure an Oracle Primavera Cloud Trigger

A trigger is an event that starts a zap and is used to begin an action in a third-party application. You can utilize different tasks to trigger a zap and begin a specific action.

To create and configure a Zapier trigger:

1) Log in to Zapier using the URL: ***https://zapier.com/app/login***
(***https://zapier.com/app/login***).

2) From the left navigation panel, select **Zaps**.

3) On the **Zaps Home** page, select **Create Zap**.

4) In the **Trigger** panel, under the **App event** section, search for and select **Oracle Primavera Cloud**.

5) In the **App & event** step, in the **Event** menu, select one of the triggers to be used with Oracle Primavera Cloud which will start the zap:
   ‣ **New (First) Commitment**: Event triggers when a task is first committed.
   ‣ **Updated Commitment**: Event triggers when a task is recommitted.
   ‣ **Updated Commitment Task**: Event triggers when any attribute of a committed task is updated.

6) Select **Continue**.

7) In the **Account** step, select **Choose an account**. Here you can select and connect to a previously created account or select **Connect a new account** to create a new account.
   a. To create a new account, enter the following information:
   a. **Domain URL**: From the drop-down list, select the Oracle Primavera Cloud data center URL.

   > **Optional**: If you selected **Other** in the **Domain URL** field, then in the **(optional)** field, enter the URL for your data center.

   b. **User name or Email**: Enter your Primavera Cloud user name or email.
   c. **Password**: Enter your Primavera Cloud password.
   d. Select **Yes, Continue to Oracle Primavera Cloud.**

8) Select **Continue**.

9) In the **Trigger** step, complete the required fields:
   a. **Workspace ID**: Enter the workspace ID of the project that will be used to send the task information.
   b. **Project ID**: Enter the project ID of the project that will be used to send the task information.
   c. In the **Advanced options** step section, complete the following fields:
   a. **Query Records**: Enter the time interval for querying the records.

   > You can enter values ranging from 1 - 60 minutes. The default is set to 15 minutes.

   b. **(Optional) Additional Filter Conditions**: Enter any additional filter conditions for the query. For example, filter tasks based on a company.
   c. Select **Continue**.

10) Select **Test trigger** to select a trigger from the list of Primavera Cloud tasks matching the event type.
11) Select **Continue**.

Create and Configure a Third-Party Application Action

An action is an event a zap performs, such as creating new items in an app or updating an existing item. Before creating and configuring a Zapier action, you must log into the application you want to connect to Primavera Cloud.

To create and configure a Zapier action:

1) In the **Action** panel, in the **App & event** section, search for the application you want the Zap to perform.
2) In the **Event** menu, select from the list of available actions that match the trigger use case you have configured.
3) Select **Continue**.
4) In the **Account** section, select **Choose an account**. Here you can connect to a previously created account or select **Connect a new account** to create a new account.
   a. To create a new account, enter the information specific to the third-party application that you are connecting to. For example, for Assignar, the following fields need to be completed:
   a. **User name**: Enter the user name for the application you are connecting to Primavera Cloud.
   b. **Password**: Enter the password for the application you are connecting to Primavera Cloud.
   c. **Region**: Enter an abbreviation for the region you are in. For example, for the United States, enter US.
   d. **Environment**: Enter the name of the environment you are connecting to.
   e. **Client ID**: Enter the client ID you use to log in to the application.
   f. Select **Yes, Continue**.
5) In the **Action** section:
   a. Configure the fields for your application. The required fields are already mapped but can be changed as needed.

   > **Note**: The list of required fields may be different depending on the application you are connecting to Oracle Primavera Cloud.

   b. Select **Continue**.
6) Select **Test Action** to ensure it works properly.
7) On the top left of the page, enter a new name for the template that you just created.
8) Select **Publish Zap.**
9) In the **Ready to publish your Zap** dialog box, select **Publish & Turn On**.