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Primavera Portfolio Management

**Support for WBS levels beyond 2 in the Bridge for P6
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Scope

- The changes and new features mentioned in this document apply to **PPM 8.0 SP2** (or higher), when connected to **P6 v8** (or higher) through the Bridge for Primavera P6.

Content

- Support for PPM WBS Levels
- Mapping WBS elements to PPM sub-items
- Defining the mapping
- How names are mapped
- How fields and categories are mapped
- Server settings and Administration form – step by step

PPM WBS Support

- **P6 WBS elements of level 2 and beyond are supported by the Bridge.**
- **Level 2 WBS elements can be updated (P6 → PPM) or published (PPM → P6)**
- **WBS elements beyond level 2 can be updated (P6 → PPM)**

How mapping is defined - mapping mode

- **Mapping of WBS elements beyond level 2 is only supported in sub-items mode.**
 - Default mode is defined per P6 server on the Bridge Server Settings dialog.

How mapping is defined - mapping mode

- **Mapping of WBS levels beyond 2 is only supported in sub-items mode.**
 - Default mode is defined per P6 server on the Bridge Server Settings dialog.
 - Mode can be overridden per Project/Item on the “Bridge Administration & Configuration” form.

How mapping works

- **WBS Elements are mapped to Sub-Items in PPM, and shown as Dynamic List rows in PPM forms**

How mapping works

- In one P6 project, all WBS elements of a given WBS level are mapped to the same Dynamic List.

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How mapping is defined – sub-item type

- In a P6 project, all WBS elements of a given level are mapped to the same Dynamic List.
- **WBS elements of Level 2:**
 - Default mapping is defined per P6 server on the Bridge Server Settings dialog.

How mapping is defined – sub-item type

- In a P6 project, all WBS elements of a given level are mapped to the same Dynamic List.
- **WBS elements of Level 2:**
 - Default mapping is defined per P6 server on the Bridge Server Settings dialog.
 - Mapping can be overridden per Project/Item on the “Bridge Administration & Configuration” form.

How mapping is defined – sub-item type

- In a P6 project, all WBS elements of a given level are mapped to the same Dynamic List.
- **WBS elements of Level 2:**
 - Default mapping is defined per P6 server on the Bridge Server Settings dialog.
 - Mapping can be overridden per Project/Item on the “Bridge Administration & Configuration” form.
- **WBS elements of Level 3 and beyond:**
 - Mapping is defined per Project/Item on the “Bridge Administration & Configuration” form, on the “SUB-ITEM: WBS LEVEL 3+” tab.

Using the “SUB-ITEM: WBS LEVEL 3+” tab

- For new (or newly imported) items, this tab starts out empty
- Add a line for each WBS of level 3 or beyond that you wish to map to PPM

Using the “SUB-ITEM: WBS LEVEL 3+” tab

- **Submit the form to save settings**
(settings apply for the selected item only)
- **After submitting the form, verify that there are no INPUT VALIDATION errors (green indicator)**
 - Errors such as using the same sub-item type for two lines will show here.



Using the “SUB-ITEM: WBS LEVEL 3+” tab

- Each subsequent Update (P6 → PPM) for this item (or a portfolio that contains it), as well as the periodical sync (if enabled), will update this item according to the settings.

How names are mapped – Level 2

- WBS elements of Level 2 are mapped to sub-items named as the WBS name.
- Renaming the sub-item in PPM can affect the WBS name (during Publish, depends on settings).

How names are mapped – Level 3+

- **WBS elements of Level 3 and beyond are mapped to sub-items named as the WBS name, concatenated with the WBS code.**
- **Renaming the sub-item in PPM cannot affect the WBS name.**

How categories are mapped

- **Categories are mapped on the Bridge Server Settings dialog.**
- **These mappings apply to all WBS levels.**

How categories are mapped

- **Categories are mapped on the Bridge Server Settings dialog.**
- **These mappings apply to all WBS levels.**
- **As each WBS level is mapped to a different dynamic list, it is possible to display different categories for each WBS level by selecting an appropriate scorecard.**
- **Only fields of level 2 WBS elements in P6 can receive values from PPM categories via Publish**

Changes in Bridge Server Settings dialog

Step by step

Bridge Server Settings dialog

- **Select sub-items mode**

Bridge Server Settings dialog

- Defaults set on the Sub-items mode screen only apply to WBS elements of level 2
- Settings for WBS elements beyond level 2 are done for each item individually on the Bridge Administration and Configuration form.
- Contracts is the default Sub-item type for WBS elements of level 2.
- Only names of level 2 WBS elements can be controlled by PPM (during publish).
- Names of WBS elements of all levels can be controlled by P6 (during update).

Bridge Server Settings dialog

- **Publish defaults are only relevant to level 2 WBS elements.**
- **Update defaults are only relevant to level 2 WBS elements.**
- **Settings for the updating of WBS elements beyond level 2 are done for each item individually on the Bridge Administration & Configuration form**

Bridge Server Settings dialog

- **P6 WBS Field mappings are relevant only for WBS elements of level 2.**
- **No data is published (PPM → P6) for WBS elements beyond level 2.**
- **PPM Categories are relevant across all WBS levels.**

Bridge Server Settings dialog

- **WBS Fields are relevant across all WBS levels.**
- **WBS Spreadsheets are relevant across all WBS levels.**
- **Note that in P6, the default setting is that Spreadsheet data is calculated (summarized) only for WBS level 2. The WBS levels for which data is summarized, is set in P6 per project.**

Changes in Bridge Administration & Configuration form

Step by step

Bridge Administration & Configuration form

- **Sub-item: WBS level 2 settings apply only to level 2 WBS elements.**
- **They override the settings in the Bridge Server Settings dialog.**

Bridge Administration & Configuration form

- **Sub-item: WBS level 3+ settings apply only to elements of level 3 and beyond.**
- **Create a line for each WBS level you wish to map to PPM sub-items.**
- **Each line maps a P6 WBS level to a PPM sub-item type.**

Bridge Administration & Configuration form

- **Specify the WBS level the line is relevant for.**
- **Select the sub-item type you wish to map the WBS level to.**
- **Select “Yes” to create a new sub-item for each new WBS element.**
- **Select “Yes” to have the sub-item removed when the WBS element is removed.**
- **Select “Yes” to have the sub-item’s categories updated from WBS field values.**

Bridge Administration & Configuration form

- **Submit the form to save settings.**
- **After submitting the form, verify that there are no input validation errors.**
- **Various error conditions may be displayed in the Input Validation area after submit**

Thank you