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Portfolio Management Bridge for Primavera P6 User Guide

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Overview

The Project Management Bridge allows information required to manage project investments, such as schedule, cost, and resource information, to be published from Primavera Portfolio Management (PPM) to a Project Management System, where detailed project planning can be performed. Project information can be updated from the Project Management Server to PPM for portfolio management analysis and strategic decision-making.

This product provides the bridge that brings together the capabilities of the experts in portfolio management and project management, respectively. Primavera Portfolio Management activities are conducted in PPM, while detailed project management information is managed and maintained in the Project Management System. Information can be synchronized between the two applications by two methods— on-demand, or automatically, according to a set periodic schedule.

Category information can be mapped to fields in the Project Management System. Mapped fields can be both published and updated. Publishing category data allows portfolio managers to send project level information such as budget and schedule goals, directly to the project managers' project plans. Updating category data with information from the Project Management System allows the portfolio manager to get accurate project level details such as exact schedule dates and cost/work figures.

P6 supports two different modes of synchronization. Dynamic list information can be mapped to WBS fields in P6 when working in Sub-items mode. For additional information refer to Step 6: Sub-Items Mode -- Entering Update Mapping Definitions in The Project Management Bridge Wizard for P6.

In Phases mode, WBS schedule information is updated into the item's phases and deliverables. Alternatively, when working in Sub-items mode, the information can be mapped to PPM categories, and updated into dynamic lists.

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Basic Principles and Concepts

The Project Management Bridge was designed in accordance with the following guiding principles and concepts to make the system simple and manageable for both users and administrators:

- **Stand alone systems** – With Project Management Bridge, both PPM and the Project Management System continue to operate as they do in their standalone mode of operation. The Project Management Bridge allows them to share information, but does not attempt to have one application perform the tasks of the other application. For example, PPM should not be used to manage project level tasks, and the Project Management System shouldn't be used to group projects into portfolios.
- **Unidirectional Information Sharing** – A category in PPM can be set to either publish information to the Project Management System or be updated from the Project Management System. A single category cannot be set for both publishing and updating. Thus, conflicts are avoided. For example, a portfolio manager can define and use a category called Estimated Project Cost to publish cost estimates to the Project Management System. The manager can then define another category called Revised Project Cost Estimation to receive updated cost estimates made by the project manager in the Project Management System.
- This capability is further enhanced in P6 Bridge Sub-items mode which allows sharing information further down in the project hierarchy. This capability makes it possible to transfer detailed project information into PPM categories.
- **Schedule Management** – If a portfolio manger creates a new project in PPM, the manager can set the start and end date of the project and its phases. This information can be published once to the Project Management System, but from that point on the portfolio manager cannot overwrite the start and end dates in the Project Management System. In many systems, the Project Management System is configured as the source for updating PPM start and end dates for projects and project phases.
- **Methodologies and Lifecycles** – When a new project is published, the Project Management System can either use an existing methodology, or base the project on its PPM lifecycle. In the latter case, the Project Management Bridge creates a WBS element to represent each phase, basing it on the project's lifecycle in PPM. In either case, WBS elements in the Project Management System can be set to update phase information in PPM. This is performed by matching the names of WBS elements and phases. For more information on publishing, refer to ***Step 6: Sub-Items Mode -- Entering Update Mapping Definitions*** (on page 28) in The Project Management Bridge Wizard for P6.
- **Project Level Data Mapping** – Categories in PPM can be set to publish or update information at the project level. For example, you can set a category in PPM to be updated by the total cost of the project in the Project Management System.
- **Sub Project Level Data Mapping –** Categories in PPM can be set to publish and update information in the task level. This information is then mapped to sub-items in PPM. For example, you can set a date category in PPM to be updated for all sub-items by the date of all milestones in P6.

  Note: For more information on sub-items, see *Working with Dynamic Lists* in the general Primavera Portfolio Management help.

- **Filtered Data Mapping** – Data mapped from a field in the Project Management System to PPM can be filtered by time or resource. Time filters allow for the creation of categories such as Cost 2007 or Cost 2008 Q1. Resource filtering allows you to filter information from the Project Management System fields based on resource field information, thereby creating categories such as Programmers Work Hours and Managers Cost. For more information on mapping, refer to ***Step 6: Sub-Items Mode -- Entering Update Mapping Definitions*** (on page 28) in The Project Management Bridge Wizard for P6.

- **Synchronization** – The Project Management Bridge can be set to automatically synchronize information between the systems according to a predefined schedule. This means that the system will publish and then update information for any item in Primavera Portfolio Management that is set to be included in the synchronization. In most systems, projects will not be included in the synchronization process unless the portfolio manager determines otherwise. This helps prevent unintentional exposure of sensitive data. The portfolio manager may decide to include items in the synchronization process if the manager wants the item to be updated on a regular basis and there is no fear of exposing data to the project manager and other Project Management System users. For a detailed description of the synchronization process refer to Configuring Synchronization in Configuring Project Management Bridge after Installation.

Managing Workflow

Workflow between Primavera Portfolio Management and the Project Management System can be managed using either a top-down or a project-based approach.

Top-Down Management

The typical Project Management Bridge customer is an organization that has been using Primavera Portfolio Management to manage its investments. Using the Project Management Bridge, it is possible to estimate costs and schedule for projects and candidate projects from within PPM, publish them to the Project Management System Server, and subsequently track their progress. The portfolio managers can also establish target dates and phases for the project manager.

In the Project Management System Server, the project manager fills in detailed project level information such as the resources, costs, and estimated time for the various phases of the project. At some later date which can be pre-arranged or based on a communication between the two managers, the portfolio manager updates Primavera Portfolio Management with the latest data.

At this stage, the portfolio manager can approve or reject the project based on the detailed project plan supplied by the project manager. The cost and work details coming from the project plan have the advantage of relying on exact schedule and resource availability considerations. The portfolio manager can now select in which project to invest based on the results of detailed project planning.

If the project is approved, the portfolio manager can make some notations and again publish the project to the Project Management System Server. The portfolio manager can monitor the project's progress through periodic updates and by comparing actual values to saved baseline values.

Project-Based Management

In this case, a company that has been working with the Project Management System imports its existing projects into Primavera Portfolio Management (PPM). Project managers generate the initial projects in the Project Management System Server, and portfolio managers import the projects into PPM to assess their performance.

The project manager chooses a suitable Project Management System enterprise template and begins generating project details. After the required project information has been entered, the project manager notifies the portfolio manager that the project is ready to be imported into PPM.

Once imported, the portfolio manager can view project details and receive up-to-date reports of costs and time. The portfolio manager can also use PPM to perform portfolio management tasks such as making investment selections based on prioritization and on alignment to business strategy.

It is possible to integrate Project Management views as web portlets within PPM forms. For more information refer to the *PPM Application Administration Guide.*

Multiple Project Management Systems & Servers Support

The Project Management Bridge supports multiple Project Management systems and Servers. Different items in Primavera Portfolio Management can be mapped to projects located in different servers in the organization. In some organizations, multiple Project Management systems and servers are used for project level management for various reasons, such as:

- Performance – The organization has set up multiple project servers to cope with performance and scalability issues.
- Standards – Different departments may require their Project Management System Servers to be managed using different methods and different field naming conventions.
- System Types—Different departments or subsidiaries may use different project management systems such as P6, Microsoft Project 2013 and Microsoft Project 2016.
- Geography – An organization may have different Project Management System servers in different geographically dispersed sites.

The Project Management Bridge allows the portfolio manger to overcome the limitations inherited in multiple Project Management systems and server installations by providing:

- Centralized management – Portfolio managers can view all of the projects from an organization in one place, regardless of the department or server in which they are located.
- Common Business Language – Fields from different servers and departments can be mapped into a single category in Primavera Portfolio Management, allowing you to compare and evaluate all segregated information in one portfolio.

The Project Management Bridge supports mappings to multiple servers while maintaining each server's ability to retain individual settings and configurations. In addition, you can save maintenance work in instances where your organization wants all or some Project Management systems or servers to share common settings and mapping configurations. Administrators can save or copy the configurations of one server and easily reapply them to other servers.

Configuring Project Management Bridge after Installation

For most configuration tasks, you use the Bridge Console, which you can access from the Tools menu in Primavera Portfolio Management.

> **Note**: For installation information, refer to the *Oracle Primavera Portfolio Management Installation and Upgrade Guide*.

Verifying Installation

If the Bridge Console has been installed properly, one or more entries for **PM Bridge** appears in **Setup > Modules > Add-Ons**. In addition, if the user has Read and View permission on the PM Bridge Add-on module, a Tools menu is added to the menu bar in Primavera Portfolio Management.

If you have upgraded from a previous version, the Bridge Console (**Tools > Bridge Console**) continues to display the PM server the system was connected to before the upgrade.

Security

You must have the appropriate security permissions in order to use and configure PM Bridge. Your security permissions determine which PM Bridge features you can access and use, and the Primavera Portfolio Management objects, items, folders, and portfolios with which you can work. Security permissions are set in Primavera Portfolio Management. For full instructions on working with security in Primavera Portfolio Management, refer to *Working with Security* in the *Oracle Primavera Portfolio Management User Guide*.

Accessing PM Bridge

PM Bridge adds a menu item called *Tools* to your Primavera Portfolio Management menu bar. From the *Tools* menu, you can access PM Bridge functions to the extent that your security permissions allow.

> **Note:** To access the *Tools* menu, you must have at least *Read &View* permission for the PM Bridge Add-On module.

To define security permissions for adding a Bridge Server:

1) In Primavera Portfolio Management, access the Setup module.
2) From the *Show* drop-down list, select **Modules**.
3) In the Modules window, select **Add-Ons**. A list of add-ons appears in the **Name** column.
4) In the **Name** column, select the relevant PM Bridge module. For example, P6 Bridge.
5) Select **Edit** to edit the security properties.

For more information, refer to *Working with Security* in the *Primavera Portfolio Management User Guide*.

Publishing and Updating

To use the publishing and updating features, you must have Read and View permission for the PM Bridge Add-On module. You must also have Edit permission for the item you want to publish or update.

In addition, you must have the following access permissions for the data you want to publish or update:

- To perform updates, you must have Edit Data permission for all data you want to update.
- To publish, you must have Read permission for all data you want to publish.

> **Note:** When you do not have permission for part of the data, the Publish and Update processes continue until their completion, skipping the data with no permission. The skipped data is logged in the log report. This report can be opened from the **Bridge Server Settings** dialog box by your administrator.

Importing and Mapping Data

Importing brings projects from the project management system into Primavera Portfolio Management, and maps project data to Primavera Portfolio Management items. For details, refer to *Data Mapping and Data Flow for P6 Bridge*.

> **Note:** To use the importing features, you must have Admin permission for the PM Bridge Add-On module.

Configuring Synchronization

The PM Bridge synchronization feature allows the administrator to synchronize data between the project management system and Primavera Portfolio Management, both immediately and at pre-determined intervals.

PM Bridge uses a specially defined Synchronization User, which the synchronization process uses to access data in PPM. For more information, refer to ***Setting the Synchronization User*** (on page 22).

There are several ways for updating data between Primavera Portfolio Management and PM servers:

- **Publishing** – Creates and updates projects in the project management system based on existing Primavera Portfolio Management items. Refer to *Data Mapping and Data Flow for P6 Bridge*.
- **Updating** – Updates Primavera Portfolio Management items with information from the projects in the project management system. Refer to *Data Mapping and Data Flow for P6 Bridge*.
- **Importing** – Creates new items in Primavera Portfolio Management based on existing projects from the project management system. Refer to ***Importing Projects*** (on page 14).
- **Synchronization** – Updates the project management system with data from PPM and updates PPM fields with data from the PM system.

Defining Synchronization Parameters

Synchronization can be set to occur at defined periodic intervals. Synchronization can also be performed manually.

Each item that has been mapped between Primavera Portfolio Management and PM system has a parameter that determines whether the item is included or excluded from the synchronization process. Additionally you can set this parameter to block manual publishing and updating, as well as excluding the item from the synchronization process.

The portfolio manager can use publishing, updating, and synchronization in whatever way works best for the particular project or company. For example, in the initial stages of a project, the manager might wish to maintain strict control over project data. To do this, the manager can disable periodic synchronization. In such cases, when the manager wants updated information in one of the systems, the manager can initiate a Publish or an Update.

In a later stage of the project, the manager might want to make sure there are frequent updates of data between Primavera Portfolio Management and the PM system. At this stage, the manager can change the setting to allow the item to be included in the periodic synchronization. If there is data the manager wishes to exclude from synchronization, the manager can set these items not to be synchronized. If the manager wishes to update these items, the manger can run an update. If there is data the manager never wants updated, the manager can set these items not to be updated either.

There are two stages of configuring synchronization:

- Setting up the synchronization parameters within the Bridge Server Settings wizard.
- Configuring periodic synchronization, or initiating an immediate synchronization from the Bridge Console.

Setting the Sync Mode Parameter

The Sync Mode parameter determines whether an item is published or updated when you publish, update, or synchronize a portfolio. When a portfolio is first published from Primavera Portfolio Management to the PM system or imported from the PM system to Primavera Portfolio Management, every item in the portfolio receives the default value for the Sync Mode parameter. For instructions on setting this default parameter, refer to ***Step 3: Entering Defaults Information*** (on page 25) in ***The Project Management Bridge Wizard for P6*** (on page 23).

Afterwards, you can change the Sync Mode value individually for each item in the portfolio. The following are the possible values for the Sync mode:

- **Sync Periodically** – The item is included in the synchronization process. Additionally, the item can be manually published or updated.
- **Do Not Sync Periodically** – The item is not included in the synchronization process. However, the item can be manually published or updated.
- **Block All Publishing And Updating** – The item is not included in the synchronization process. The item cannot be manually published or updated.

To set the Sync Mode parameter for an item in a portfolio:

In Primavera Portfolio Management, open the Scorecard module. For instructions on working with scorecards, refer to *Working with the Portfolio Scorecard* in the *Oracle Primavera Portfolio Management User Guide.*

1) In the **Scorecard** drop-down list, select **Scorecards > System Scorecards > Project Management Bridge > Project Management Bridge Administration**.
2) In the **Portfolio** drop-down list, select the portfolio containing the item with which you are working. The items in the portfolio appear in the **Items** column.

   The following parameters appear for each item:

   - **Server** – The name of the PM Server to which this item is mapped.
   - **Mapping Mode—**The mapping mode for this item.
   - **Project UID** – A unique ID assigned to each item at the time it is first published to the PM server or imported from the PM server into Primavera Portfolio Management.
   - **Sync Mode** – The item's synchronization mode, as explained in this section.
   - **Last Published on** – The date on which the item was most recently published to the PM server.
   - **Last Published by** – The user that most recently published the item to the PM server.
   - **Last Updated on** – The date on which the item was most recently updated.
   - **Last Updated by** – The user that most recently updated the item.
3) Click the *Sync Mode* field for the item, and select the Sync Mode value you wish to assign to the item.

> **Note:** The Sync Mode category can be placed in additional Scorecards or Forms to allow better access to it in different workflows.

The Project Management Bridge Menu

Once the PM Bridge is installed, a new menu called *Tools* is added to the Primavera Portfolio Management menu bar. Most PM Bridge operations are accessed from this menu.

> **Note:** If the **Tools** menu is not visible, check that your administrator has assigned you the proper permissions.

All Bridge operations originate in this menu. To access the PM Bridge Menu, click the **Tools** menu.

The following Bridge-specific functions are accessed from the PM Bridge menu:

- Publish to PM
- Update from PM
- PM Web Access
- Bridge Console
- Help / About

Publish to PM

PPM publishes information for the current item or portfolio items to P6. When you publish a Primavera Portfolio Management item for the first time, a new project is created in Primavera P6. Subsequent publishing of an item allows new information to be shared with P6. For more information on publishing, refer to *Data Mapping and Data Flow for P6 Bridge*.

> **Note:** If you are in Investor or Scorecard when you publish, all the items in the selected portfolio are published. If you are in Forms, Dashboards or Workbook, only the item displayed or items in the displayed portfolio are published.

Update from PM

P6 updates the currently selected Primavera Portfolio Management item (or items in the displayed portfolio) with new information from P6. Through the update feature, portfolio managers can stay current with the progress of active and developing projects.

> **Note:**
>
> - If you are in Investor or Scorecard when you update, all the items in the displayed portfolio are updated. If you are in Forms, Dashboards or Workbook, only the item displayed or items in the displayed portfolio are updated.
> - Update can run only if the selected item is mapped or published to a project on the P6 Server.

PM Web Access

PM Web Access opens a browser window to the P6 web application server, enabling you to view project level details or perform tasks in P6. If you have selected an item which is mapped to the server, the browser will open in Project view and display the selected project.

Bridge Console

The Bridge Console is the main window for managing the Bridge. Using the Bridge Console, the administrator can monitor all P6 servers associated with PPM. Use the console to:

- View all servers, including status information and synchronization information.
- Add and remove P6 servers.
- Initiate a sync for a single server, or for multiple servers.
- View logs and configurations (reports) of each server.
- Access Project Web Access for each server, web interface of theP6 server.
- Load, save, and Edit server settings.

> **Note:** The *Options* dialog that was available from the *Tools* menu in previous versions can now be accessed by selecting a server and

clicking **Edit** from within the *Bridge Console*.

Help / About

- **Help** – Opens the PM Bridge help.
- **About Project Management Bridge** – Displays versioning and patent information for PM Bridge.

Importing Projects

The import process is used for one of the following options:

- Create new items in Primavera Portfolio Management based on projects in a PM System, and map them to each other.
- Map projects from a PM System to existing items in Primavera Portfolio Management.

The Import feature is used when:

- You are installing the system for the first time in an environment that has been using a PM System but not Primavera Portfolio Management, and you are planning to import all the projects and create new items based on them in Primavera Portfolio Management.
- You are installing the system for the first time in an environment that has been running both products side by side, and now you want to map projects in PM System to their counterparts in Primavera Portfolio Management.
- You have an environment where projects are initiated in PM System, and you want to create new mapped items in Primavera Portfolio Management, based on the projects in PM System.

Note: In a multiple server environment, you will need to import projects from each server individually (Tools > Bridge Console > Import). After the import, the system remembers to which PM Server each item is mapped, and will use this information during subsequent publishing.

Importing Projects

When you have one or more projects that were created and managed in PM Server, and you want to start managing them in Primavera Portfolio Management as well, you need to import them into Primavera Portfolio Management. Since the imported projects were not created in Primavera Portfolio Management, the system creates a new item in Primavera Portfolio Management for each imported project and maps it to its counterpart in PM Server. As a result of this mapping these projects share and exchange information during the next Publish and Update processes.

To import projects:

1) Select **Tools** > **Bridge Console…**. The Bridge Console dialog box appears.
2) Select a PM server from the list, and click **Import**.

3) Select **Create new items** to have a new item created in PPM for each project imported from the selected server, or select **Map to existing items** to map each imported project to a specific item in PPM.

> **Note:** When the system creates a new item in Primavera Portfolio Management during import, it assigns this item the name of the project it is based on in PM Server. The system can not create a new item if there is already an existing item in Primavera Portfolio Management with the same name.

4) Click **Next** to select the projects you would like to import.
5) In the **Available Projects** pane select the projects you want to import, and then click **Add** to move the projects to the **Selected Projects** pane.

> **Note**: If you select more than one item to import, they will have the same home portfolio, manager, Status, Sync Mode, Life Cycle, and—depending on the server settings—Mapping Mode. Therefore, only import multiple items if you are certain that the projects share these settings.

6) Click **Next**.

   If you selected **Create new items** in the first step of the wizard, fill out the information needed to create the new items.

   If you selected **Map to existing items** in the first step of the wizard, for each project in the left column, select the item from Primavera Portfolio Management you want to map it to from the drop down list in the right column. Items and Projects need not have matching names.
7) Assign a portfolio to be the Home Portfolio of the items you are importing. You can change this later within the item itself. This is a required field.
8) Assign a manager to the new Primavera Portfolio Management items. This is a required field.

> **Note**: If you have Admin permissions for the specified home portfolio, you can set any other user to be the manager of the new items. If you do not have Admin permissions for the specified home portfolio, you can only set yourself to be the manager of the items.

9) Select a Status of **Open**, **Closed**, or **Candidate** for each item.
10) Select the Life Cycle you are applying to the each new Primavera Portfolio Management item.
11) Select the Sync Mode you are applying. For more information on Sync Modes, refer to ***Setting the Sync Mode Parameter*** (on page 11) in ***Configuring Project Management Bridge after Installation*** (on page 8).
12) Depending on the server settings, you may need to select the Mapping Mode you are applying. For more information on mapping, refer to ***Step 6: Sub-Items Mode -- Entering Update Mapping Definitions*** (on page 28) in ***The Project Management Bridge Wizard for P6*** (on page 23).
13) Click **Import** to start importing the selected projects. A progress indicator appears.

14) When the progress indicator displays a process completed message, click **Close**.

Bridge Console

Most PM Bridge administrative tasks are performed via the Bridge Console dialog box. The Bridge Console dialog box is accessed from the Tools menu in Primavera Portfolio Management.

You must have Admin permission to access the *Bridge Console* dialog box. For users that haven't been granted the Admin permission, the Bridge Console option is grayed out in the Tools menu.

> **Note:** The Tools menu is added to user menu options only if the user is assigned View permission in the module security setup for the PM Bridge add-on. If the user does not have View permission, the Tools menu does not appear on the toolbar of the user.

To open the Bridge Console, click **Tools**, **Bridge Console**.

The Bridge Console is the main window for working with the PM Bridge. The console provides a list of all configured Project Management system servers, their status, and related synchronization information. The administrator can use the Bridge Console to define Project Management system servers and to monitor their connection and synchronization status.

This chapter consists of the following sections:

- Project Management Systems Server List
- Status Area
- PM Bridge Console Operation

Project Management Systems Server List

The console displays a single row for each Project Management system server associated with the PM Bridge.

You can sort the rows by clicking the column heading of any column.

The following fields appear for each row in the list of servers:

- **Connection Status Column** – The icons in this column represent the status of the connection between the PM Bridge and the Project Management system server. Information about the selected server is shown in the status area. The following table lists the status icons and their meaning.

Icon	Meaning
	Status - OK Connection to Project Management server is valid and properly configured.

Icon	Meaning
	Status – Warning Project Management server is working but not fully functional (i.e. OLAP cube not available etc.)
	Status – Error No connection between the PM Bridge and Project Management server.
	Loading, Please wait… System is waiting for status information.

Note: The status icon is not refreshed automatically as system events occur. The status is updated after each refresh or load of the window. To refresh the window, press F5.

- **Server Name** – Displays the name of the Project Management system server. To change a server name, refer to Step 2: Entering General Bridge Server Settings Information in The Project Management Bridge Wizard for P6.
- **Sync Type** – Displays the type of synchronization: *Manual* or *Periodic*. To change the sync type, refer to Step 3: Entering Defaults Information in The Project Management Bridge Wizard for P6.
- **Sync Status** – Displays the synchronization between the PM Bridge and the Project Management system server. Possible values are:
  - **Completed (Success)** – The latest synchronization process completed without any errors.
  - **Completed (Errors)** – The latest synchronization process completed, but there were some errors. Check the server log to see the errors.
  - **Failed** – The latest synchronization process failed to complete. Check the server log to see the errors.
  - **Running** – A synchronization process is currently running. You cannot start a new synchronization process until this one is completed.
  - **Never Synced** – No synchronization process has been run for this server.
- **Last Sync** – Displays the date and time the last synchronization process finished. If the sync failed, the date and time of the failure are shown.
- **Next Sync** – Displays the date and time the next sync is scheduled to start. If the sync type is *manual*, *n/a* appears in this field. To change the sync type, refer to Step 3: Entering Defaults Information in The Project Management Bridge Wizard for P6.

Status Area

The status area at the bottom of the console displays status messages for the selected Project Management system server. The same messages can be viewed using the Viewing a PM Server Log Button and in the General step of the Bridge Server Settings wizard. For more information on the status area, refer to Step 2: Entering General Bridge Server Settings Information in The Project Management Bridge Wizard for P6.

It is suggested that you check the server logs for any server that indicates an error in the status window on the Bridge Console dialog box.

PM Bridge Console Operation

The Bridge Console is the central place to define and access various PM Bridge components. Perform the necessary operations using the buttons described in the following sub-sections:

- Adding a PM Server describes how to add a new Project Management system server.
- Checking Server Status describes how to check the server status.
- Editing the PM Server Configuration describes how to edit an existing Project Management system server.
- Removing a PM Server describes how to remove a Project Management system server from the servers list.
- Synchronizing Projects from a PM Server describes how to synchronize the mapped projects on the selected Project Management system server.
- Importing Projects from a PM Server describes how to import projects from a Project Management system server.
- Accessing a PM Server's Web Interface describes how to access the PM server using its web interface.
- Viewing a PM Server Log describes how to view the Bridge's log for the selected PM server.
- Printing the PM Server Configuration Report describes how to view and print the PM server s settings report.
- Loading PM Server Settings describes how to load existing server settings from one server to another, or from an existing XML file.
- Saving PM Server Settings describes how to save existing PM server settings as an XML file.
- Viewing the System Log describes how to view the system log containing events from all servers.
- Setting the Synchronization User describes how set up the Primavera Portfolio Management user credentials to be used by the synchronization process.

Adding a PM Server

You set up access to one or more project management servers by using the *Add* button on the Bridge Console. Each server that you add is listed in the PM Servers List.

Once you have added a server, users can publish information to the server and update Primavera Portfolio Management with new information from that server.

You need the URL, user name and password for the server, as well as a name and description to describe the server in the *Bridge Console*.

To add a project management server to Primavera Portfolio Management, click **Add** on the Bridge Console.

If your system is set up to accept more than one kind of project management server, select the server type from the drop-down list. The relevant Bridge Server Settings wizard appears. For more information on setting up P6 servers refer to Step 2: Entering General Bridge Server Settings Information in The Project Management Bridge Wizard for P6.

Checking Server Status

Each server that you add is listed in the *Servers List* in the *Bridge Console*. To the left of each server entry is a status icon indicating the current status of that server. The status of each server can also be viewed from the Options dialog box of the server.

To view detailed status information about the server:

1) Select the server in the Bridge Console.
2) The status information is visible in the **Status** box.
3) To view additional information, or to run the system test that updates the status indications, click **Edit**. For more information refer to Editing the PM Server Configuration

Editing the PM Server Configuration

You can edit the project management server configuration by using the Edit button on the Bridge Console.

To edit a project management server, double-click on the server you want to edit in the Bridge Console, or select the server name and click **Edit.** For more information on editing P6 server setup refer to ***Step 2: Entering General Bridge Server Settings Information*** (on page 24) in ***The Project Management Bridge Wizard for P6*** (on page 23).

Removing a PM Server

You can remove a project management server configuration by using the Remove function on the Bridge Console.

To remove a project management server:

1) On the Bridge Console, select the server you want to remove and click **Remove.**

> **Note:** Removing a server causes all of the settings and project mappings associated with the server to be lost.

2) Select **OK** to continue or **Cancel** to abort the operation.

Synchronizing Projects from a PM Server

You can synchronize your server by using the Sync button on the Bridge Console.

To synchronize projects from a PM server:

1) On the Bridge Console, select the server you want to remove synchronize and click **Sync.**

> **Note:** The system will publish and update information for all items

mapped to the selected server.

2) Select **OK** to continue or **Cancel** to abort the operation.

Importing Projects from a PM Server

You can import project into your server by using the Import function on the Bridge Console. For more information on the Import functionality refer to Importing Projects.

Accessing a PM Server's Web Interface

Project Web Access is the Project Management server web interface enabling you to view all projects in the Project Server, or view project level details. You can open the Project Web Access for a selected Project Management server from the *Bridge Console*.

To open Project Web Access for a PM server select a server row and click **Web Access** from the Bridge Console. The Project Web Access web page is launched.

Note: The **Web Access** button is enabled only if a single server is selected.

Viewing a PM Server Log

The server log contains status and error information about individual servers. You may want to check the server log if you see any errors concerning the server in the status area of the Bridge Console. The server log allows you to follow events that are related to a specific server, such as publishing or updating an item, importing an item, or sync operations that were run on the server.

To view the log for a project management server, select a server row and click **Log** from the Bridge Console. The Project Management server Log Report window appears, displaying all events related to that server.

To view all server log, click **System Log** in the bottom right of the Bridge Console. The System Log window appears, displaying all events related to all bridge servers.

Printing the PM Server Configuration Report

You can view a print-ready report of all the settings for a selected PM server. The report opens in a separate window. The report is intended to assist the Primavera Portfolio Management administrator in comparing and communicating server settings while working in a multiple server environment. It is also a good way to communicate with PM server administrators to ensure that common settings are applied across the enterprise.

To view the report for a PM server, select a server row and click **Report** from the Bridge Console. A Project Management server Report window appears, displaying the server's configuration information.

Loading PM Server Settings

You can automatically configure a server, either by loading the configuration from a saved configuration, or by copying the configuration directly from another server.

Loading or copying the server options provides the following benefits:

- Saves work by applying settings that were entered once to multiple targets.
- Provides administrators with a set of standard settings for all servers, with an efficient tool to duplicate settings.
- Allows you to copy settings from a development server to a production server.
- Allows you to move settings from one Primavera Portfolio Management server to another server.
- Allows you to backup the settings of a server.
- Load settings from a previous version of PPM by loading from an XML file.

For information on saving a configuration to a file, refer to Saving PM Server Settings.

To load options to a server:

1) From the Bridge Console, select one or more servers and click **Load.** The Load Server Options dialog box appears.

> **Note**: You can load settings to multiple servers at once by selecting more than one server and then clicking **Load**.

2) To copy a configuration from another server, select **Copy options from server** and select the server from the dropdown list.
3) To load the configuration from a saved configuration file, select **Load options from file** and enter the path to the XML file in the text box. You can also enter the path to the file by browsing for the file using the **Browse** button.

> **Notes**:
>
> - Server options can be loaded only from a file that was saved in the Bridge Console, using the Save As button or from a Bridge Package file that was saved using the Bridge Packager in previous versions.
> - It is not possible to load to a P6 server settings file used in MSP project servers and vice versa. It is possible to load settings between MSP 2013 and MSP 2016 only if no custom fields have been defined.
> - When loading options to the server, all of the server's existing options are, by default, replaced with the new options. If you want to exclude an option set from being loaded, uncheck that option on the *Load Server Options* dialog box. The sets you can exclude are **Sync**, **Defaults**, **Publish**, **Update**.
> - Each checkbox correlates to a step in the Bridge wizard. By unchecking the box of a set, you prevent the system from replacing the options that are stored in that set. For example, if you want to copy the Publish and Update category-field mappings from

> one server to another, but want to preserve the Sync times of the target server, uncheck the Sync checkbox before loading the options.

4) Click **OK** to finish. If you are loading new settings to a single server, a confirmation dialog box appears, warning you that the current settings for this server will be overwritten if you continue.
5) Click **OK** in the confirmation dialog box. The selected options are loaded to the server.

Saving PM Server Settings

You can save a server configuration to a file. You can use this file to backup your server settings before making changes, or to load these settings to another server at another time. You can also copy the file to another machine with Primavera Portfolio Management and Bridge, and use it on that machine to load the configuration to one of the listed PM servers.

To save a server configuration to a file:

1) From the Bridge Console, click **Save As.**
2) Browse to the directory in which you want to save the file, enter a file name (or leave the default file name)
3) Click **Save**.

Viewing the System Log

The PM Bridge system log contains status and error information about the PM Bridge. You may want to check the system log if you see errors concerning the servers in the status area of the Bridge Console. The Primavera Portfolio Management Bridge System Log Report allows you to view all the Bridge related events, including all the events that are documented in the different server logs and system level events, such as portfolio publish and update, and system level sync operations. The log opens in a separate window.

To view the system log, click **System Log** in the the Bridge Console.

Setting the Synchronization User

The synchronization process must run under the credentials of a Primavera Portfolio Management user.

To set the synchronization user:

1) Click **Select** in the bottom right of the Bridge Console.
2) Select the user name from the drop-down list and specify the password for that user.
3) Click **OK** to set the selected user as the Sync User.

> **Note**: If the password of this user changes, the Sync User password must be updated, or the synchronization process will fail.

For supported versions of P6 and MS Project, refer to the *Tested Configurations* document.

The Project Management Bridge Wizard for P6

The PM Bridge Server Settings wizard lets you setup the transfer of data back and forth between Primavera Portfolio Management and the P6 project management system.

Setting up the PM Bridge

To setup the PM Bridge and P6 settings complete the steps below:

- Step 1: Accessing the Bridge Server Settings Wizard describes how to access the Bridge Server Settings Wizard.
- Step 2: Entering General Bridge Server Settings Information describes how to enter general information for the PM Bridge setup including the URLs, synchronization schedule, and server' name.
- Step 3: Entering Defaults Information describes how to enter the default mapping mode and synchronization mode.
- Step 4: Sub-Items Mode — Entering Mapping Defaults describes how to select a sub-item type, and set defaults for publish and update create/removal behavior for sub-items and WBS.
- Step 5: Sub-Items Mode-- Entering Publish Mapping Definitions describes how to map fields and projects codes for publishing to P6.
- Step 6: Sub-Items Mode -- Entering Update Mapping Definitions describes how to map fields, projects codes and spreadsheets fields for updating Primavera Portfolio Management.
- Step 7: Phases Mode — Entering Mapping Defaults describes how PPM phases and deliverable data should be transferred in update and publish operations.
- Step 8: Phases Mode— Entering Publish Mapping Definitions describes how to map fields and project codes for publishing to P6.
- Step 9: Phases Mode— Entering Update Mapping Definitions describes how to map fields and project codes and spreadsheets fields for updating Primavera Portfolio Management.

Step 1: Accessing the Bridge Server Settings Wizard

This section describes how to access the Bridge Server Settings Wizard.

1) From the **Tools** menu select the **Bridge Console** option. The Bridge Console window is displayed.
2) Click **Add** to define the bridge server settings for a new server.

   OR

   Select a P6 server from the list and click **Edit.**
3) The Bridge Server Settings wizard is displayed.

> **Note:** The Bridge Server Settings wizard can also be accessed by double clicking on a specific server name in the Bridge Console window.

Step 2: Entering General Bridge Server Settings Information

This section describes how to enter general information about the new value list, including the list name and description.

1) Open the Bridge Server Settings Wizard, as described in Step 1. The General step of the Bridge Server Settings Wizard is displayed.
2) In the **Status** area you can view the status of the server that is currently defined.
3) In the **Synchronization** area, you can define the frequency of the synchronization:
   - Check the **Sync every** checkbox and enter the number of weeks/days/hours between synchronizations.
   - You can view and edit the date and time of the **Next Sync** by selecting the necessary date from the pop-up calendar and selecting the hour from the drop-down list.
   - Select a Sync Time Out value. The value in this dropdown signifies the time span for which the system will wait for the sync job to complete before it stops the job (in case of a manual sync) or stops the job and restarts the job (in case of a scheduled sync).You can select from the following options:
     - 15 min
     - 30 min
     - 1 hour
     - 3 hours
     - 6 hours
     - 12 hours
     - 23 hours
     - Unlimited
4) Click **Test** to test the connection with the defined servers.

   Click **Log** to open the Project Management Server Log Report window. The Project Management Server Log Report includes the following columns: **Time**, **Event**, **Object Name**, **Status**, **User**, **Error Code**, and **Description**.
5) In the **Server Name** field, enter the name of the server with which you would like to synchronize.
6) In the **P6 Web Services URL** field, enter the URL of the server's P6 web service with which you would like to synchronize.
7) In the **P6 Web Access URL** field, enter the P6 server web access URL. This URL will be used to enable web access to P6 from within the PPM application.

> **Note:** Make sure that the name and URLs you supply are unique in the system, and that the server is not mapped to another Primavera Portfolio Management server.

8) In the **Server Proxy** field, enter the proxy URL to connect P6 on cloud servers.

   For an on-premises P6 server, do not enter the proxy URL.
9) In the **Description** field, enter an (optional) description for the defined server.

10) In the **Access to P6** area, enter the **User Name** and **Password** that will be used to access the server.
11) Click **Next** to proceed to the next step of the Bridge Server Settings Wizard, where you can define the default mapping options.

Step 3: Entering Defaults Information

This section describes how to enter the defaults that will be used to link Primavera Portfolio Management items with P6 projects.

1) From the **General** step, click **Next**. The Defaults step of the Bridge Server Settings Wizard is displayed.
2) In the **Mapping Mode** field, select the mode that is relevant for your setup. Choose among:
   - **Sub-items:** this option maps the WBS elements in P6 to sub-items in Primavera Portfolio Management.
   - **Phases:** this option maps the WBS elements and milestones activities in P6 to phases and deliverables in Primavera Portfolio Management.
   - **Either Phases or Sub-items:** this option lets the user define whether to map the WBS elements to sub-items or to phases and deliverables in Primavera Portfolio Management.
3) In the **Sync mode for newly mapped items** field, pick the synchronization schedule for newly-mapped items. Choose one of the following:
   - **Do not sync periodically:** Portfolio Management items containing this setting will not be synchronized automatically.
     In order to have data transfer for these items you need to manually select either **Publish** or **Update** from *Tools* menu.
   - **Sync periodically:** PPM items containing this setting will automatically be synchronized with their mapped projects on MS Project Server on the date and time defined in the *General* step.

     Note: For a detailed description of the synchronization process refer to Configuring Synchronization in Configuring Project Management Bridge after Installation.

   - **Block all publishing and updating:** this option blocks all synchronization operations between P6 and PPM. If you would like to have a hyperlink from P6 to the relevant item in PPM, you may select a P6 field to hold this link. The PM Bridge will automatically create this hyperlink and populate the selected field. Select the desired field from the **P6 project field to be hyperlinked to PPM** drop-down list. To cancel this association, select the empty row at the very top of the drop-down list.
4) In the **Upon Update or Sync, MSP data will be transferred into PPM categories** field, specify which data is transferred to PPM categories when data is updated or synced:
   - **All P6 data, modified or not**: All P6 data is transferred to PPM.
   - **Only the P6 data that was modified**: Only modified P6 data is transferred to PPM. This setting helps improve performance by limiting the amount of data that needs to be transferred.

5) **In the Default EPS node for new projects** field, select the default EPS node. Every project in P6 is created within a specific EPS node. When publishing new items, the PM Bridge will use the EPS node defined here, but **only if** there is no other EPS node definition for that item.

> **Note:** For more information on how to define an EPS node for a specific item, see *Data Mapping and Data Flow for P6 Bridge*.

6) In the **Mapping** area you can define whether you would like the PM Bridge to automatically create milestones in P6 that denote the Start and End dates of the items.

   When an item is published for the first time, a new project is created in P6 Server that is mapped to the item. The system adds reference scheduling information by adding tasks to the project plan. It can add two milestone tasks in the project plan that describe the Start and End dates that were set for the project in Primavera Portfolio Management.

   The project manager can use these dates to reference the original plans that were determined by the portfolio manager. If these references become unnecessary, the project manager can easily remove them from the project plan, since they are only entered when the project is first published.

   To define these automatic milestones, check the **Add item Start Date and End Date references during initial mapping** checkbox**.**

   To define an automatic update of these dates during publish, check the **Publish item Start Date and End Date changes** checkbox.

> **Note:** When you select to add the Start and End dates during the initial mapping, corresponding Start and End date milestones are created in the P6 application. This means the project will not be able to start later than the specified Start Date nor end earlier than the specified End Date. You may delete these automatically-created milestones.

7) Click **Next** to proceed to the next step of the Bridge Server Settings Wizard.

Step 4: Sub-Items Mode — Entering Mapping Defaults

> **Note:** This section is relevant only if you selected either **Sub-Items** or **Either Phases or Sub-Items** as your mapping mode in Step 3: Entering Defaults Information.

This section describes how you can enter map defaults in Sub-Items Mode.

1) From the top **Defaults** step, click **Next**.
2) In the **Sub-items type** field, from the drop-down list, select the desired sub-item type.
3) Select whether Primavera Portfolio Management or P6 define the sub-item name.
4) In the **Publish** area, check the relevant options.
5) In the **Update** area, check the relevant options.
6) From the **Default methodology for initial publish** drop list, select one of the predefined methodologies.

7) Click **Next** to proceed to the next step of the Bridge Server Settings Wizard, where you can define the Publish mapping definitions.

Step 5: Sub-Items Mode-- Entering Publish Mapping Definitions

> **Note:** This section is relevant only if you selected either **Sub-Items** or **Either Phases or Sub-Items** as your mapping mode in Step 3: Entering Defaults Information.

This section describes how you can enter mapping definitions for the Publish operation in Sub-Items Mode. Publish mapping involves selecting a PPM category and matching it to a P6 project field, project code, or WBS field.

From the Sub-Items Mode **Defaults** step, click **Next**.

To map a project field:

1) In the **Project Fields** tab, double-click in the <0P_ProdName_P6PM_Short> **Categories** column to select the PPM category you would like to map to P6.
2) Double-click in the **P6 Project Fields** column to select the corresponding P6 project field.
3) Repeat this process for every P6 project field you want to map.
4) To remove previously defined mapping, select the category or project field from the list and click **Remove**.

To map a project code:

1) In the **Project Codes** tab, double-click in the PPM **Categories** column to select the PPM category you would like to map to P6.
2) Double-click in the **P6 Project Codes** column to select the corresponding P6 project code.
3) Repeat this process for every P6 project code you want to map.
4) To remove previously defined mapping, select the category or project code from the list and click **Remove**.

To map a WBS field:

1) In the **WBS Fields** tab, double-click in the PPM **Categories** column to select the PPM category you would like to map to P6.
2) Double-click in the **P6 WBS Fields** column to select the corresponding P6 WBS field.
3) Repeat this process for every P6 WBS field you want to map.
4) To remove previously defined mapping, select the category or WBS field from the list and click **Remove**.

Step 6: Sub-Items Mode -- Entering Update Mapping Definitions

> **Note:** This section is relevant only if you selected either **Sub-Items** or **Either Phases or Sub-Items** as your mapping mode in Step 3: Entering Defaults Information.

This section describes how you can enter mapping definitions for the Update operation in Sub-Items Mode. Update mapping involves selecting a P6 project field, project code, spreadsheet field, or WBS field and matching it to a PPM category.

From the Sub-Items Mode **Publish** step, click **Next**.

To map a P6 project field:

1) In the **Project Fields** tab, double-click in the **P6 Project Fields** column to select the **P6** project field you would like to map to PPM.
2) Double-click in the PPM **Categories** column to select the corresponding PPM category.
3) Repeat this process for every project field you want to map.
4) To remove previously defined mapping, select the project field or a category from the list and click **Remove**.

To map a P6 project code:

1) In the **Project Codes** tab, double-click in the **P6 Project Codes** column to select the P6 project code you would like to map to a PPM category.
2) Double-click in the PPM **Categories** column to select the corresponding PPM category.
3) Repeat this process for every project code you want to map.
4) To remove previously defined mapping, select the project code or a category from the list and click **Remove**.

To map a P6 project level spreadsheet field:

1) In the **Project Spreadsheets** tab, double-click in the **P6 Spreadsheet Fields** column to select the P6 project-level spreadsheet field you would like to map to a PPM category.
2) To filter the spreadsheet, double-click in the **Filter** column, or select the cell and click **Edit**. All spreadsheet fields can be filtered by **Period**. Additionally, some fields can be filtered by **Activities**. Open the **Summarize** drop-down list and select **By Resource** to filter by Resource, or select **By Role** to filter by Role. If you selected **By Resource**, the **Resource Field** drop-down list will appear, allowing you to select from Built-in and User-defined resource fields and a particular value for the selected field. If you selected **ByRole**, the **Role** drop-down list will appear, allowing to select a role to filter by.

   For example, assuming you select a resource field called **Actual Cost** and filter it by defining the **Period** as `year`, the **Year** as `2008`, the **Resource Field** as `indicator1` and the **Value** as `yellow`.

   The result is the value $5,126.36. It reflects the filtering specifications as performed on the P6 spreadsheet.
3) Double-click in the PPM **Categories** column to select the corresponding PPM category.
4) Repeat this process for every P6 project-level spreadsheet field you want to map.

5) To remove previously defined mapping, select the project-level spreadsheet field or category from the list and click **Remove**.

To map a P6 WBS field:

1) In the **WBS Fields** tab, double-click in the **P6 WBS Fields** column to select the P6 WBS field you would like to map to a PPM category.
2) Double-click in the Primavera Portfolio Management **Categories** column to select the corresponding PPM category.
3) Repeat this process for every P6 WBS field you want to map.
4) To remove previously defined mapping, select the WBS field or category from the list and click **Remove**.

To map a P6 WBS level spreadsheet field:

1) In the **WBS Spreadsheets** tab, double-click in the **P6 Spreadsheet Fields** column to select the P6 WBS-level spreadsheet field you would like to map to a <0P_ProdName_PPM_Web> category.
2) To filter the spreadsheet, double-click in the **Filter** column, or select the cell and click **Edit**. All WBS level spreadsheet fields can be filtered by **Period** only. It is not possible to filter the WBS level spreadsheet fields by types of Activities, which is why the **Summarize** drop-down is grayed out.
3) Double-click in the PPM **Categories** column to select the corresponding PPM category.
4) Repeat this process for every P6 WBS-level spreadsheet field you want to map.
5) To remove previously defined mapping, select the WBS-level spreadsheet field or category from the list and click **Remove**.

Step 7: Phases Mode — Entering Mapping Defaults

> **Note:** This section is relevant only if you selected either **Sub-Items** or **Either Phases or Sub-Items** as your mapping mode in Step 3: Entering Defaults Information.

1) From the top *Defaults* step, click **Next**.
2) In the **Mapping** area, check, or uncheck the **Add phase date reference during initial mapping**. When this option is checked, phase date references will be added as milestones activities to the project in P6.

   When an item is published for the first time, a new project is created in P6 Server that is mapped to the item. The system can add some scheduling information as a summary task that contains a task for each phase in the life cycle of the item. These tasks reference the Start and End dates of each phase as it was set in <0P_ProdName_PPM, prior to when the project was first published.

   The project manager can use these dates to reference the original plans that were determined by the portfolio manager. If these references become unnecessary, the project manager can easily remove them from the project plan, since they are only entered when the project is first published.

3) In the **Publish** area, check, or uncheck the **Publish deliverables to milestone activities**. When this option is checked, deliverables' data will be published to the P6 project as milestone activities.
4) In the **Update** area:
   - Check or uncheck the **Update phases from corresponding WBS elements.** When this option is checked, phase data will be updated from the corresponding WBS elements.
   - Check or uncheck the **Update deliverables from corresponding milestone activities.** When this option is checked, deliverable data will be updated from the corresponding milestone activities.
5) Click **Next** to proceed to the next step of the Bridge Server Settings Wizard, where you can define the Publish mapping definitions.

Step 8: Phases Mode— Entering Publish Mapping Definitions

> **Note:** This section is relevant only if you selected either **Sub-Items** or **Either Phases or Sub-Items** as your mapping mode in Step 3: Entering Defaults Information.

This section describes how you can enter mapping definitions for the Publish operation in Phases Mode. Publish mapping involves selecting a PPM category and matching it to a P6 project field, or project code.

From the Phases Mode **Defaults** step, click **Next**.

To map a project field:

1) In the **Project Fields** tab, double-click in the PPM **Categories** column to select the PPM category you would like to map to P6.
2) Double-click in the **P6 Project Fields** column to select the corresponding P6 project field.
3) Repeat this process for every P6 project field you want to map.
4) To remove previously defined mapping, select the category or project field from the list and click **Remove**.

To map a project code:

1) In the **Project Codes** tab, double-click in the PPM **Categories** column to select the PPM category you would like to map to P6.
2) Double-click in the **P6 Project Codes** column to select the corresponding P6 project code.
3) Repeat this process for every P6 project code you want to map.
4) To remove previously defined mapping, select the category or project code from the list and click **Remove**.

Step 9: Phases Mode— Entering Update Mapping Definitions

> **Note:** This section is relevant only if you selected either **Sub-Items** or **Either Phases or Sub-Items** as your mapping mode in Step 3: Entering Defaults Information.

This section describes how you can enter mapping definitions for the Update operation in Phases Mode. Update mapping involves selecting a P6 project field, project code, or spreadsheet field and matching it to a PPM category.

From the Phases Mode **Publish** step, click **Next**.

To map a P6 project field:

1) In the **Project Fields** tab, double-click in the **P6 Project Fields** column to select the **P6** project field you would like to map to PPM.
2) Double-click in the PPM **Categories** column to select the corresponding PPM category.
3) Repeat this process for every project field you want to map.
4) To remove previously defined mapping, select the project field or a category from the list and click **Remove**.

To map a P6 project code:

1) In the **Project Codes** tab, double-click in the **P6 Project Codes** column to select the P6 project code you would like to map to a PPM category.
2) Double-click in the PPM **Categories** column to select the corresponding PPM category.
3) Repeat this process for every project code you want to map.
4) To remove previously defined mapping, select the project code or a category from the list and click **Remove**.

To map a P6 project level spreadsheet field:

1) In the **Project Spreadsheets** tab, double-click in the **P6 Spreadsheet Fields** column to select the P6 project-level spreadsheet field you would like to map to a PPM category.
2) To filter the spreadsheet, double-click in the **Filter** column, or select the cell and click **Edit**. All spreadsheet fields can be filtered by **Period**. Additionally, some fields can be filtered by **Activities**. Open the **Summarize** drop-down list and select **By Resource** to filter by Resource, or select **By Role** to filter by Role. If you selected **By Resource**, the **Resource Field** drop-down list will appear, allowing you to select from Built-in and User-defined resource fields and a particular value for the selected field. If you selected **ByRole**, the **Role** drop-down list will appear, allowing to select a role to filter by.

   For example, assuming you select a resource field called **Actual Cost** and filter it by defining the **Period** as `year`, the **Year** as `2008`, the **Resource Field** as `indicator1` and the **Value** as `yellow`.

   The result is the value $5,126.36. It reflects the filtering specifications as performed on the P6 spreadsheet.
3) Double-click in the PPM **Categories** column to select the corresponding PPM category.
4) Repeat this process for every P6 spreadsheet field you want to map.

5) To remove previously defined mapping, select the spreadsheet field or a category from the list and click **Remove**.

Viewing Information from the Project Management System

As the portfolio manager, you may occasionally want to look at the project level details that are found in the project plan in the Project Management system. Primavera Portfolio Management (<0P_ProdName_PPM_Short) provides you with two ways of accessing and viewing such information:

- **Project Web Access** - A menu command that opens a Project Management system server web page, called Project Web Access, which is in context with your current view in Primavera Portfolio Management.
- **Web Portlet** - A form component that can be set up to show the Project Management system views from within a form in Primavera Portfolio Management.

Project Web Access

The Project Web Access command, found in the Tools menu in Primavera Portfolio Management, enables you to open a Project Management system Web Access view in a new browser window. If you are viewing an item (which has been published to the Project Management server) in the Forms or Workbook module, the browser opens and displays the View A Project page of the project that is mapped to the item in the Project Management system Web Access.

> **Note:** Project Management system Web Access is the name of the web interface of Project Management system Server. Project Management system Web Access is used to access Project Management system Server information via the web. Such information includes project plans, resources pool, etc.

If you are viewing a portfolio (or you are in Scorecard or Investor and no item or portfolio is selected), the browser opens and displays the *Project Center* from the Project Management system Web Access. The *Project Center* allows you to view and open any project found in the Project Management system Server.

> **Note:** When a single item is presented or selected in PPM, such as within a Form or Scorecard, the system will automatically open the correct Project Management system server for that item. If multiple items are presented or selected, such as an entire portfolio in Scorecard or Workbook, and the portfolio's items are associated with more than one Project Management system server, a dialog box appears asking you to select the Project Management system server that you want to open.

Web Portlet

Web portlets are Form components that can be set up to display Project Management system Web Access views (or any other web page). You can use the toolbars to navigate within the portlet and activate display features.

Note:

- For more information on creating web portlets, refer to *Data Mapping and Data Flow for P6 Bridge*.
- You can map different items to different Project Management system servers. The web portlet can be configured to automatically display project information from the correct Project Management system server for each item.

Available P6 Fields

- P6 Project level fields available for update Items and Portfolios**-** This table shows all the P6 Project fields available for selection on the **Map P6 fields on project level to Primavera Portfolio Management categories on item level:** screen.

The table shows the following information for each field:

- P6 Project field name as it appears on the selection drop down
- P6 Project field name as it appears on P6 Power client
- The data type
  - P6 Project level fields available for publish (listing also known P6 validations) **-** This table shows all the P6 Project fields available for selection on the **Map PPM categories on item level to P6 fields on project level:** screen.

The table shows the following information for each field:

- P6 Project field name as it appears on the selection drop down list
- P6 Project field name as it appears on P6 Power client
- The data type
- Validations performed by P6 for the value of this field (there may be other validations not listed here)
  - P6 WBS level fields available for update**-** This table shows all the P6 WBS fields available for selection on the **Map P6 fields on WBS level to PPM categories on Sub-Item level:** screen.

The table shows the following information for each field:

- P6 Project field name as it appears on the selection drop down list
- P6 Project field name as it appears on P6 Power client
- The data type
  - P6 WBS level fields available for publish (listing also known P6 validations) - This table shows all the P6 Project fields available for selection on the **Map PPM categories on Sub-Item level to P6 fields on WBS level:** screen.

The table shows the following information for each field:

- P6 Project field name as it appears on the selection drop down list
- P6 Project field name as it appears on P6 Power client
- The data type
- Validations performed by P6 for the value of this field (there may be other validations not listed here)
  - P6 Spreadsheet fields available for Update **-** This table shows all the P6 Project fields available for selection on the **Map P6 spreadsheet fields to PPM categories on item level:** screen.

The table shows the following information for each field:

- Spreadsheet field name as it appears on the selection drop down
- P6 Spreadsheet field name as it appears on P6 Power client
- Whether the spreadsheet field summaries can be filtered by resource or not (the data type of all these fields is numeric)
  - P6 Resource fields available for spreadsheet selected resources filter **-** This table shows all the all the P6 Resource fields available for selection on the **Specify spreadsheet values to be included in the project's total:** screen.

The table shows the following information for each field:

- P6 Resource field name as it appears on the selection drop down
- P6 Resource field name as it appears on P6 Power client
- The data type

P6 Project level fields available for update Items and Portfolios

#	P6 field name in dropdown	P6 field name in Power Client	Data Type
1	AddActualToRemaining	Add Actual To Remain	Flag
2	AddedBy	Added By	Text
3	AnnualDiscountRate	–	–
4	AnticipatedFinishDate	Anticipated Finish	Date
5	AnticipatedStartDate	Anticipated Start	Date
6	CheckOutDate	Date Checked Out	Date
7	ContainsSummaryData	Contains Summary Data	Flag
8	ContainsSummaryDataOnly	Contains Summarized Data Only	Flag

9	CreateDate	_	_
10	CreateUser	_	_
11	CurrentBudget	Current Budget	Cost
12	CurrentVariance	Current Variance	Cost
13	DataDate	Data Date	Date
14	DateAdded	Date Added	Date
15	DiscountApplicationPeriod	_	_
16	DistributedCurrentBudget	Distributed Current Budget	Cost
17	EarnedValueETCUserValue	_	_
18	EarnedValueUserPercent	_	_
19	EstimatedWeight	_	_
20	FinishDate	Finish	Date
21	FiscalYearStartMonth	_	_
22	ForecastFinishDate	Forecast Finish Date	Date
23	ForecastStartDate	Forecast Start Date	Date
24	HasFutureBucketData	_	_
25	IndependentETCLaborUnits	Independent ETC Labor Units	Integer
26	IndependentETCTotalCost	Independent ETC Total Cost	Cost
27	LastSummarizedDate	Last Summarized Date	Date
28	LastUpdateDate	_	_
29	LastUpdateUser	_	_
30	LevelingPriority	Project Leveling Priority	Integer
31	MustFinishByDate	Must Finish By	Date

32	Name	Project Name	Text
33	OBSName	Resposinble Manager	Text
34	OriginalBudget	Original Budget	Cost
35	OverallProjectScore	_	_
36	PlannedStartDate	Planned Start	Date
37	ProjectForecastStartDate	Project Forecast Start	Date
38	ProposedBudget	Proposed Budget	Cost
39	RiskLevel	Risk Level	ValueList
40	ScheduledFinishDate	_	_
41	StartDate	Start	Date
42	Status	Project Status	ValueList
43	StrategicPriority	Strategic Priority	Special
44	SummaryAccountingVarianceByCost	Accounting Variance	Cost
45	SummaryAccountingVarianceByLaborUnits	Accounting Variance - Labor Units	Integer
46	SummaryActivityCount	Total Activities	ActivitesRelated
47	SummaryActualDuration	Actual Duration	Integer
48	SummaryActualExpenseCost	Actual Expense Cost	Cost
49	SummaryActualFinishDate	Actual Finish	Date
50	SummaryActualLaborCost	Actual Labor Cost	Cost
51	SummaryActualLaborUnits	Actual Labor Units	Integer
52	SummaryActualMaterialCost	Actual Material Cost	Cost
53	SummaryActualNonLaborCost	Actual Nonlabor Cost	Cost
54	SummaryActualNonLaborUnits	Actual Nonlabor Units	Integer

55	SummaryActualStartDate	Actual Start	Date
56	SummaryActualThisPeriodCost	_	_
57	SummaryActualThisPeriodLaborCost	Actual This Period Labor Cost	Cost
58	SummaryActualThisPeriodLaborUnits	Actual This Period Labor Units	Integer
59	SummaryActualThisPeriodMaterialCost	Actual This Period Material Cost	Cost
60	SummaryActualThisPeriodNonLaborCost	Actual This Period Nonlabor Cost	Cost
61	SummaryActualThisPeriodNonLaborUnits	Actual This Period Nonlabor Units	Integer
62	SummaryActualTotalCost	Actual Total Cost	Cost
63	SummaryActualValueByCost	_	_
64	SummaryActualValueByLaborUnits	_	_
65	SummaryAtCompletionDuration	At Completion Duration	Integer
66	SummaryAtCompletionExpenseCost	At Completion Expense Cost	Cost
67	SummaryAtCompletionLaborCost	At Completion Labor Cost	Cost
68	SummaryAtCompletionLaborUnits	At Completion Labor Units	Integer
69	SummaryAtCompletionMaterialCost	At Completion Material Cost	Cost
70	SummaryAtCompletionNonLaborCost	At Completion Nonlabor Cost	Cost
71	SummaryAtCompletionNonLaborUnits	At Completion Nonlabor Units	Integer
72	SummaryAtCompletionTotalCost	At Completion Total Cost	Cost
73	SummaryAtCompletionTotalCostVariance	_	_

74	SummaryBaselineCompletedActivityCount	BL Project Completed Activities	ActivitesRelated
75	SummaryBaselineDuration	BL Project Duration	Integer
76	SummaryBaselineExpenseCost	BL Project Expense Cost	Cost
77	SummaryBaselineFinishDate	BL Project Finish	Date
78	SummaryBaselineInProgressActivityCount	BL Project In-Progress Activities	ActivitesRelated
79	SummaryBaselineLaborCost	BL Project Labor Cost	Cost
80	SummaryBaselineLaborUnits	BL Project Labor Units	Integer
81	SummaryBaselineMaterialCost	BL Project Material Cost	Cost
82	SummaryBaselineNonLaborCost	BL Project Nonlabor Cost	Cost
83	SummaryBaselineNonLaborUnits	BL Project Nonlabor Units	Integer
84	SummaryBaselineNotStartedActivityCount	BL Project Not-Started Activities	ActivitesRelated
85	SummaryBaselineStartDate	BL Project Start	Date
86	SummaryBaselineTotalCost	BL Project Total Cost	Cost
87	SummaryBudgetAtCompletionByCost	Budget At Completion	Cost
88	SummaryBudgetAtCompletionByLaborUnits	Budget At Completion (BAC) - Labor Units	Integer
89	SummaryCompletedActivityCount	Actual Completed Activities	ActivitesRelated
90	SummaryCostPercentComplete	Cost % Complete	PercentComplete
91	SummaryCostPercentOfPlanned	Cost % Of Planned	PercentComplete
92	SummaryCostPerformanceIndexByCost	Cost Performance Index	Unkown
93	SummaryCostPerformanceIndexByLaborUnits	Cost Performance Index - Labor Units	Unkown

94	SummaryCostVarianceByCost	Cost Variance	Cost
95	SummaryCostVarianceByLaborUnits	Cost Variance - Labor Units	Integer
96	SummaryCostVarianceIndex	_	_
97	SummaryCostVarianceIndexByCost	Cost Variance Index	Unkown
98	SummaryCostVarianceIndexByLaborUnits	Cost Variance Index - Labor Units	Unkown
99	SummaryDurationPercentComplete	_	_
100	SummaryDurationPercentOfPlanned	Duration % Of Planned	PercentComplete
101	SummaryDurationVariance	_	_
102	SummaryEarnedValueByCost	Earned Value Cost	Cost
103	SummaryEarnedValueByLaborUnits	Earned Value - Labor Units	Integer
104	SummaryEstimateAtCompletionByCost	Estimate At Completion Cost	Cost
105	SummaryEstimateAtCompletionByLaborUnits	Estimate At Completion - Labor Units	Integer
106	SummaryEstimateAtCompletionHighPercentByLaborUnits	_	_
107	SummaryEstimateAtCompletionLowPercentByLaborUnits	_	_
108	SummaryEstimateToCompleteByCost	Estimate To Complete	Cost
109	SummaryEstimateToCompleteByLaborUnits	Estimate To Complete - Labor Units	Integer
110	SummaryExpenseCostPercentComplete	Expense Cost % Complete	PercentComplete
111	SummaryExpenseCostVariance	Variance - BL Project Expense Cost	Cost
112	SummaryFinishDateVariance	_	_

113	SummaryInProgressActivityCount	Actual In-Progress Activities	ActivitesRelated
114	SummaryLaborCostPercentComplete	Labor Cost % Complete	PercentComplete
115	SummaryLaborCostVariance	Variance - BL Project Labor Cost	Cost
116	SummaryLaborUnitsPercentComplete	Labor Units % Complete	PercentComplete
117	SummaryLaborUnitsVariance	Variance - BL Project Labor Units	Integer
118	SummaryMaterialCostPercentComplete	Material Cost % Complete	PercentComplete
119	SummaryMaterialCostVariance	Variance - BL Project Material Cost	Cost
120	SummaryNonLaborCostPercentComplete	Nonlabor Cost % Complete	PercentComplete
121	SummaryNonLaborCostVariance	Variance - BL Project Nonlabor Cost	Cost
122	SummaryNonLaborUnitsPercentComplete	Nonlabor Units % Complete	PercentComplete
123	SummaryNonLaborUnitsVariance	Variance - BL Project Nonlabor Units	Integer
124	SummaryNotStartedActivityCount	Actual Not-Started Activities	ActivitesRelated
125	SummaryPerformancePercentCompleteByCost	–	–
126	SummaryPerformancePercentCompleteByLaborUnits	–	–
127	SummaryPlannedValueByCost	–	–
128	SummaryPlannedValueByLaborUnits	–	–
129	SummaryProgressFinishDate	–	–

130	SummaryRemainingDuration	Remaining Duration	Integer
131	SummaryRemainingExpenseCost	Remaining Expense Cost	Cost
132	SummaryRemainingFinishDate	_	_
133	SummaryRemainingLaborCost	Remaining Labor Cost	Cost
134	SummaryRemainingLaborUnits	Remaining Labor Units	Integer
135	SummaryRemainingMaterialCost	Remaining Material Cost	Cost
136	SummaryRemainingNonLaborCost	Remaining Nonlabor Cost	Cost
137	SummaryRemainingNonLaborUnits	Remaining Nonlabor Units	Integer
138	SummaryRemainingStartDate	_	_
139	SummaryRemainingTotalCost	Remaining Total Cost	Cost
140	SummarySchedulePercentComplete	_	_
141	SummarySchedulePercentCompleteByLaborUnits	_	_
142	SummarySchedulePerformanceIndexByCost	_	_
143	SummarySchedulePerformanceIndexByLaborUnits	_	_
144	SummaryScheduleVarianceByCost	Schedule Variance	Cost
145	SummaryScheduleVarianceByLaborUnits	Schedule Variance - Labor Units	Integer
146	SummaryScheduleVarianceIndex	_	_
147	SummaryScheduleVarianceIndexByCost	_	_
148	SummaryScheduleVarianceIndexByLaborUnits	_	_
149	SummaryStartDateVariance	_	_
150	SummaryToCompletePerformanceIndexByCost	To Complete Performance Index	Unkown

151	SummaryTotalCostVariance	_	_
152	SummaryTotalFloat	_	_
153	SummaryUnitsPercentComplete	_	_
154	SummaryVarianceAtCompletionByLaborUnits	Variance At Completion - Labor Units	Integer
155	TotalBenefitPlan	Total Benefit Plan	Cost
156	TotalBenefitPlanTally	Total Benefit Plan Tally	Cost
157	TotalFunding	Total Funding	Cost
158	TotalSpendingPlan	Total Spending Plan	Cost
159	TotalSpendingPlanTally	Total Spending Plan Tally	Cost
160	UnallocatedBudget	Unallocated Budget	Cost
161	UndistributedCurrentVariance	Undistributed Current Variance	Cost
162	WebSiteRootDirectory	Web Site Root Directory	Text
163	WebSiteURL	Project Web Site URL	Text

P6 Project level fields available for publish

#	P6 field name in dropdown	P6 field name in Power Client	Data Type	Validations in P6
1	AddActualToRemaining	Add Actual To Remain	Flag	_

2	AddedBy	Added By	Text	▸ Cannot be null ▸ Text up to 32 characters inclusive
3	AnnualDiscountRate	_	_	▸ Can be null ▸ If not null, can only be in the 0 to 100 range inclusive.
4	AnticipatedFinishDate	Anticipated Finish	Date	▸ Can be null ▸ Can be no earlier than the value of the AnticipatedStartDate field
5	AnticipatedStartDate	Anticipated Start	Date	▸ Can be null ▸ Can be no later than the value for the AnticipatedFinishDate field
6	ContainsSummaryDataOnly	Contains Summarized Data Only	Flag	_
7	DataDate	Data Date	Date	▸ Cannot be null ▸ Should be no earlier than the PlannedStartDate field value for the project
8	DateAdded	Date Added	Date	▸ Cannot be null
9	DiscountApplicationPeriod	_	_	▸ Cannot be null ▸ Can be one of: Year, Quarter, Month
10	EarnedValueETCUserValue	_	_	▸ Cannot be null ▸ Can only be in the 0 to 100,000,000 range inclusive
11	EarnedValueUserPercent	_	_	▸ Can be null ▸ If not null, can only be in the 0 to 1 inclusive
12	EstimatedWeight	_	_	▸ Cannot be null ▸ Cannot be less than 0
13	FiscalYearStartMonth	_	_	▸ Cannot be null ▸ Can only in the 0 to 11 range inclusive
1	IndependentETCLa	Independent	Inte	_

4	borUnits	ETC Labor Units	ger	
15	IndependentETCTotalCost	Independent ETC Total Cost	Cost	▸ Can be null. ▸ If not null, can only be in the -1.0E16 to 1.0E16 range
16	LevelingPriority	Project Leveling Priority	Integer	▸ Cannot be null ▸ Can only be in the 1 to 100 range inclusive
17	MustFinishByDate	Must Finish By	Date	▸ Can be null ▸ Can be no earlier than the value of PlannedStartDate
18	Name	Project Name	Text	▸ Cannot be null ▸ Maximum length of 100 characters inclusive
19	OriginalBudget	Original Budget	Cost	▸ Can be null ▸ If not null, can only be in the range of -100,000,000,000,000,000 To 100,000,000,000,000,000 inclusive
20	PlannedStartDate	Planned Start	Date	▸ Cannot be null ▸ Should be no later than the 'DataDate' field value for the project ▸ Must be no later than the 'MustFinishByDate' field value for the project
21	ProjectForecastStartDate	Project Forecast Start	Date	–
22	RiskLevel	Risk Level	ValueList	▸ Cannot be null ▸ One of : VeryHigh, High , Medium , Low, VeryLow
23	ScheduledFinishDate	–	–	–

24	Status	Project Status	ValueList	• Cannot be null • One of: Planned, Active, Inactive, WhatIf, Requested • [WBS] Cannot be changed from/to What-if in WBS-level • [WBS] Cannot be Inactive if project isn't Active/Inactive • [WBS] Cannot be Active if project isn't Active [WBS] Cannot be Planned if project isn't Active/Planned
25	Strategic Priority	Strategic Priority	Special	• Cannot be null • Can only be in the 1 to 10000 range inclusive.
26	WebSiteRootDirectory	Web Site Root Directory	Text	• Can be null • Can be up to 120 characters inclusive
27	WebSiteURL	Project Web Site URL	Text	• Can be null • Can be up to 200 characters inclusive

P6 WBS level fields available for update

#	P6 field name in dropdown	P6 field name in Power Client	Data Type
1	AnticipatedFinishDate	Anticipated Finish	Date
2	AnticipatedStartDate	Anticipated Start	Date
3	ContainsSummaryData	Contains Summary Data	Flag
4	CreateDate	_	_
5	CreateUser	_	_
6	CurrentBudget	Current Budget	Cost
7	CurrentVariance	Current Variance	Cost
8	DistributedCurrentBudget	Distributed Current Budget	Cost

9	EarnedValueETCUserValue	_	_
10	EarnedValueUserPercent	_	_
11	EstimatedWeight	_	_
12	FinishDate	Finish	Date
13	ForecastFinishDate	Forecast Finish Date	Date
14	ForecastStartDate	Forecast Start Date	Date
15	IndependentETCLaborUnits	Independent ETC Labor Units	Integer
16	IndependentETCTotalCost	Independent ETC Total Cost	Cost
17	LastUpdateDate	_	_
18	LastUpdateUser	_	_
19	Name	Project Name	Text
20	OBSName	Responsible Manager	Text
21	OriginalBudget	Original Budget	Cost
22	ProposedBudget	Proposed Budget	Cost
23	StartDate	Start	Date
24	Status	Project Status	ValueList
25	SummaryAccountingVarianceByCost	Accounting Variance	Cost
26	SummaryAccountingVarianceByLaborUnits	Accounting Variance - Labor Units	Integer
27	SummaryActivityCount	Total Activities	ActivitesRelated
28	SummaryActualDuration	Actual Duration	Integer
29	SummaryActualExpenseCost	Actual Expense Cost	Cost
30	SummaryActualFinishDate	Actual Finish	Date

31	SummaryActualLaborCost	Actual Labor Cost	Cost
32	SummaryActualLaborUnits	Actual Labor Units	Integer
33	SummaryActualMaterialCost	Actual Material Cost	Cost
34	SummaryActualNonLaborCost	Actual Nonlabor Cost	Cost
35	SummaryActualNonLaborUnits	Actual Nonlabor Units	Integer
36	SummaryActualStartDate	Actual Start	Date
37	SummaryActualThisPeriodCost	_	_
38	SummaryActualThisPeriodLaborCost	Actual This Period Labor Cost	Cost
39	SummaryActualThisPeriodLaborUnits	Actual This Period Labor Units	Integer
40	SummaryActualThisPeriodMaterialCost	Actual This Period Material Cost	Cost
41	SummaryActualThisPeriodNonLaborCost	Actual This Period Nonlabor Cost	Cost
42	SummaryActualThisPeriodNonLaborUnits	Actual This Period Nonlabor Units	Integer
43	SummaryActualTotalCost	Actual Total Cost	Cost
44	SummaryActualValueByCost	_	_
45	SummaryActualValueByLaborUnits	_	_
46	SummaryAtCompletionDuration	At Completion Duration	Integer
47	SummaryAtCompletionExpenseCost	At Completion Expense Cost	Cost
48	SummaryAtCompletionLaborCost	At Completion Labor Cost	Cost
49	SummaryAtCompletionLaborUnits	At Completion Labor Units	Integer
50	SummaryAtCompletionMaterialCost	At Completion Material Cost	Cost

51	SummaryAtCompletionNonLaborCost	At Completion Nonlabor Cost	Cost
52	SummaryAtCompletionNonLaborUnits	At Completion Nonlabor Units	Integer
53	SummaryAtCompletionTotalCost	At Completion Total Cost	Cost
54	SummaryAtCompletionTotalCostVariance	_	_
55	SummaryBaselineCompletedActivityCount	BL Project Completed Activities	ActivitesRelated
56	SummaryBaselineDuration	BL Project Duration	Integer
57	SummaryBaselineExpenseCost	BL Project Expense Cost	Cost
58	SummaryBaselineFinishDate	BL Project Finish	Date
59	SummaryBaselineInProgressActivityCount	BL Project In-Progress Activities	ActivitesRelated
60	SummaryBaselineLaborCost	BL Project Labor Cost	Cost
61	SummaryBaselineLaborUnits	BL Project Labor Units	Integer
62	SummaryBaselineMaterialCost	BL Project Material Cost	Cost
63	SummaryBaselineNonLaborCost	BL Project Nonlabor Cost	Cost
64	SummaryBaselineNonLaborUnits	BL Project Nonlabor Units	Integer
65	SummaryBaselineNotStartedActivityCount	BL Project Not-Started Activities	ActivitesRelated
66	SummaryBaselineStartDate	BL Project Start	Date
67	SummaryBaselineTotalCost	BL Project Total Cost	Cost
68	SummaryBudgetAtCompletionByCost	Budget At Completion	Cost
69	SummaryBudgetAtCompletionByLaborUnits	Budget At Completion (BAC) - Labor Units	Integer
70	SummaryCompletedActivityCount	Actual Completed Activities	ActivitesRelated

71	SummaryCostPercentComplete	Cost % Complete	PercentComplete
72	SummaryCostPercentOfPlanned	Cost % Of Planned	PercentComplete
73	SummaryCostPerformanceIndexByCost	Cost Performance Index	Unknown
74	SummaryCostPerformanceIndexByLaborUnits	Cost Performance Index - Labor Units	Unknown
75	SummaryCostVarianceByCost	Cost Variance	Cost
76	SummaryCostVarianceByLaborUnits	Cost Variance - Labor Units	Integer
77	SummaryCostVarianceIndex	_	_
78	SummaryCostVarianceIndexByCost	Cost Variance Index	Unknown
79	SummaryCostVarianceIndexByLaborUnits	Cost Variance Index - Labor Units	Unknown
80	SummaryDurationPercentComplete	_	_
81	SummaryDurationPercentOfPlanned	Duration % Of Planned	PercentComplete
82	SummaryDurationVariance	_	_
83	SummaryEarnedValueByCost	Earned Value Cost	Cost
84	SummaryEarnedValueByLaborUnits	Earned Value - Labor Units	Integer
85	SummaryEstimateAtCompletionByCost	Estimate At Completion Cost	Cost
86	SummaryEstimateAtCompletionByLaborUnits	Estimate At Completion - Labor Units	Integer
87	SummaryEstimateAtCompletionHighPercentByLaborUnits	_	_
88	SummaryEstimateAtCompletionLowPercentByLaborUnits	_	_
89	SummaryEstimateToCompleteByCost	Estimate To Complete	Cost

90	SummaryEstimateToCompleteByLaborUnits	Estimate To Complete - Labor Units	Integer
91	SummaryExpenseCostPercentComplete	Expense Cost % Complete	PercentComplete
92	SummaryExpenseCostVariance	Variance - BL Project Expense Cost	Cost
93	SummaryFinishDateVariance	_	_
94	SummaryInProgressActivityCount	Actual In-Progress Activities	ActivitesRelated
95	SummaryLaborCostPercentComplete	Labor Cost % Complete	PercentComplete
96	SummaryLaborCostVariance	Variance - BL Project Labor Cost	Cost
97	SummaryLaborUnitsPercentComplete	Labor Units % Complete	PercentComplete
98	SummaryLaborUnitsVariance	Variance - BL Project Labor Units	Integer
99	SummaryMaterialCostPercentComplete	Material Cost % Complete	PercentComplete
100	SummaryMaterialCostVariance	Variance - BL Project Material Cost	Cost
101	SummaryNonLaborCostPercentComplete	Nonlabor Cost % Complete	PercentComplete
102	SummaryNonLaborCostVariance	Variance - BL Project Nonlabor Cost	Cost
103	SummaryNonLaborUnitsPercentComplete	Nonlabor Units % Complete	PercentComplete
104	SummaryNonLaborUnitsVariance	Variance - BL Project Nonlabor Units	Integer
105	SummaryNotStartedActivityCount	Actual Not-Started Activities	ActivitesRelated
106	SummaryPerformancePercentComplete	_	_

	ByLaborUnits		
107	SummaryPlannedValueByCost	_	_
108	SummaryPlannedValueByLaborUnits	_	_
109	SummaryProgressFinishDate	_	_
110	SummaryRemainingDuration	Remaining Duration	Integer
111	SummaryRemainingExpenseCost	Remaining Expense Cost	Cost
112	SummaryRemainingFinishDate	_	_
113	SummaryRemainingLaborCost	Remaining Labor Cost	Cost
114	SummaryRemainingLaborUnits	Remaining Labor Units	Integer
115	SummaryRemainingMaterialCost	Remaining Material Cost	Cost
116	SummaryRemainingNonLaborCost	Remaining Nonlabor Cost	Cost
117	SummaryRemainingNonLaborUnits	Remaining Nonlabor Units	Integer
118	SummaryRemainingStartDate	_	_
119	SummaryRemainingTotalCost	Remaining Total Cost	Cost
120	SummarySchedulePercentComplete	_	_
121	SummarySchedulePercentCompleteByLaborUnits	_	_
122	SummarySchedulePerformanceIndexByCost	_	_
123	SummarySchedulePerformanceIndexByLaborUnits	_	_
124	SummaryScheduleVarianceByCost	Schedule Variance	Cost
125	SummaryScheduleVarianceByLaborUnits	Schedule Variance - Labor Units	Integer
126	SummaryScheduleVarianceIndex	_	_

127	SummaryScheduleVarianceIndexByCost	_	_
128	SummaryScheduleVarianceIndexByLaborUnits	_	_
129	SummaryStartDateVariance	_	_
130	SummaryToCompletePerformanceIndexByCost	To Complete Performance Index	Unknown
131	SummaryTotalCostVariance	_	_
132	SummaryTotalFloat	_	_
133	SummaryUnitsPercentComplete	_	_
134	SummaryVarianceAtCompletionByLaborUnits	Variance At Completion - Labor Units	Integer
135	TotalBenefitPlan	Total Benefit Plan	Cost
136	TotalBenefitPlanTally	Total Benefit Plan Tally	Cost
137	TotalSpendingPlan	Total Spending Plan	Cost
138	TotalSpendingPlanTally	Total Spending Plan Tally	Cost
139	UnallocatedBudget	Unallocated Budget	Cost
140	UndistributedCurrentVariance	Undistributed Current Variance	Cost

P6 WBS level fields available for publish

#	P6 field name in dropdown	P6 field name in Power Client	Data Type	Validations in P6
1	AnticipatedFinishDate	Anticipated Finish	Date	▸ Can be null ▸ Can be no earlier than the value of the 'AnticipatedStartDate' field
2	AnticipatedStartD	Anticipated	Date	▸ Can be null ▸ Can be no later than the value for

	ate	Start		the AnticipatedFinishDate field
3	EarnedValueETCUserValue	_	_	▸ Cannot be null ▸ Can only be in the 0 to 100,000,000 range inclusive.
4	EarnedValueUserPercent	_	_	▸ Can be null ▸ If not null , can only be in the 0 to 1 inclusive.
5	EstimatedWeight	_	_	▸ Can be null ▸ If not null, cannot be less than 0
6	IndependentETCLaborUnits	Independent ETC Labor Units	Integer	_
7	IndependentETCTotalCost	Independent ETC Total Cost	Cost	▸ Can be null ▸ If not null , can only be in the -1.0E16 to 1.0E16 range
8	Name	Project Name	Text	▸ Cannot be null Maximum length of 100 characters inclusive
9	OriginalBudget	Original Budget	Cost	▸ Can be null ▸ If not null, can only be in the range of -100,000,000,000,000,000 to 100,000,000,000,000,000 inclusive
10	Status	Project Status	Value List	▸ Cannot be null ▸ One of: Planned, Active, Inactive, WhatIf, Requested ▸ [WBS] Cannot be changed from/to What-if in WBS-level ▸ [WBS] Cannot be Inactive if project isn't Active/Inactive ▸ [WBS] Cannot be Active if project isn't Active [WBS] Cannot be Planned if project isn't Active/Planned

P6 Spreadsheet fields available for Update

#	P6 field name in dropdown	P6 field name in Power Client	Can be filtered by selected Resources
1	ActualCost	Actual Cost	Yes

2	ActualExpenseCost	Actual Expense Cost	No
3	ActualLaborCost	Actual Labor Cost	No
4	ActualLaborUnits	Actual Labor Units	No
5	ActualMaterialCost	Actual Material Cost	No
6	ActualNonlaborCost	Actual Nonlabor Cost	No
7	ActualNonlaborUnits	Actual Nonlabor Units	No
8	ActualOvertimeCost	Actual Overtime Cost	Yes
9	ActualOvertimeUnits	Actual Overtime Units	Yes
10	ActualRegularCost	Actual Regular Cost	Yes
11	ActualRegularUnits	Actual Regular Units	Yes
12	ActualTotalCost	Actual Total Cost	No
13	ActualUnits	Actual Units	Yes
14	AtCompletionCost	At Completion Cost	Yes
15	AtCompletionExpenseCost	At Completion Expense Cost	No
16	AtCompletionLaborCost	At Completion Labor Cost	No
17	AtCompletionLaborUnits	At Completion Labor Units	No
18	AtCompletionMaterialCost	At Completion Material Cost	No
19	AtCompletionNonlaborCost	At Completion Nonlabor Cost	No
20	AtCompletionNonlaborUnits	At Completion Nonlabor Units	No

21	AtCompletionTotalCost	At Completion Total Cost	No
22	AtCompletionUnits	At Completion Units	Yes
23	BaselinePlannedExpenseCost	BL Project Expense Cost	No
24	BaselinePlannedLaborCost	BL Project Labor Cost	No
25	BaselinePlannedLaborUnits	BL Project Labor Units	No
26	BaselinePlannedMaterialCost	BL Project Material Cost	No
27	BaselinePlannedNonlaborCost	BL Project Nonlabor Cost	No
28	BaselinePlannedNonlaborUnits	BL Project Nonlabor Units	No
29	BaselinePlannedTotalCost	BL Project Total Cost	No
30	EarnedValueCost	Earned Value Cost	No
31	EarnedValueLaborUnits	Earned Value Labor Units	No
32	EstimateAtCompletionCost	Estimate At Complete Cost	No
33	EstimateAtCompletionLaborUnits	Estimate At Completion Labor Units	No
34	EstimateToCompleteCost	Estimate To Complete	No
35	EstimateToCompleteLaborUnits	Estimate To Complete Labor Units	No
36	Limit	_	Yes

37	PeriodActualCost	Period Actual Cost	Yes
38	PeriodActualExpenseCost	Period Actual Expense Cost	No
39	PeriodActualLaborCost	Period Actual Labor Cost	No
40	PeriodActualLaborUnits	Period Actual Labor Units	No
41	PeriodActualMaterialCost	Period Actual Material Cost	No
42	PeriodActualNonLaborCost	Period Actual Non Labor Cost	No
43	PeriodActualNonLaborUnits	Period Actual Non Labor Units	No
44	PeriodActualUnits	Period Actual Units	Yes
45	PeriodAtCompletionCost	Period At Completion Cost	Yes
46	PeriodAtCompletionExpenseCost	Period At Completion Expense Cost	No
47	PeriodAtCompletionLaborCost	Period At Completion Labor Cost	No
48	PeriodAtCompletionLaborUnits	Period At Completion Labor Units	No
49	PeriodAtCompletionMaterialCost	Period At Completion Material Cost	No
50	PeriodAtCompletionNonLaborCost	Period At Completion Non Labor Cost	No
51	PeriodAtCompletionNonLaborUnits	Period At Completion Non Labor Units	No
52	PeriodAtCompletionTotalCost	Period At Completion Total Cost	No

53	PeriodAtCompletionUnits	Period At Completion Units	Yes
54	PeriodEarnedValueCost	Period Earned Value Cost	No
55	PeriodEarnedValueLaborUnits	Period Earned Value Labor Units	No
56	PeriodEstimateAtCompletionCost	Period Estimate At Completion	No
57	PeriodEstimateAtCompletionLaborUnits	Period Estimate At Completion Labor Units	No
58	PeriodPlannedValueCost	Period Planned Value Cost	No
59	PeriodPlannedValueLaborUnits	Period Planned Value Labor Units	No
60	PlannedCost	Planned Cost	Yes
61	PlannedExpenseCost	Planned Expense Cost	No
62	PlannedLaborCost	Planned Labor Cost	No
63	PlannedLaborUnits	Planned Labor Units	No
64	PlannedMaterialCost	Planned Material Cost	No
65	PlannedNonlaborCost	Planned Nonlabor Cost	No
66	PlannedNonlaborUnits	Planned Nonlabor Units	No
67	PlannedTotalCost	Planned Total Cost	No
68	PlannedUnits	Planned Units	Yes

69	PlannedValueCost	Planned Value Cost	No
70	PlannedValueLaborUnits	Planned Value Labor Units	No
71	RemainingCost	_	Yes
72	RemainingExpenseCost	Remaining Expense Cost	No
73	RemainingLaborCost	Remaining Labor Cost	No
74	RemainingLaborUnits	Remaining Labor Units	No
75	RemainingLateCost	Remaining Late Cost	Yes
76	RemainingLateUnits	Remaining Late Units	Yes
77	RemainingMaterialCost	Remaining Material Cost	No
78	RemainingNonlaborCost	Remaining Nonlabor Cost	No
79	RemainingNonlaborUnits	Remaining Nonlabor Units	No
80	RemainingTotalCost	Remaining Total Cost	No
81	RemainingUnits	Remaining Units	Yes
82	StaffedRemainingCost	Staffed Remaining Cost	Yes
83	StaffedRemainingLateCost	Staffed Remaining Late Cost	Yes
84	StaffedRemainingLateUnits	Staffed Remaining Late Units	Yes

85	StaffedRemainingUnits	Staffed Remaining Units	Yes
86	UnstaffedRemainingCost	Unstaffed Remaining Cost	Yes
87	UnstaffedRemainingLateCost	Unstaffed Remaining Late Cost	Yes
88	UnstaffedRemainingLateUnits	Unstaffed Remaining Late Units	Yes
89	UnstaffedRemainingUnits	Unstaffed Remaining Units	Yes

P6 Resource fields available for spreadsheet selected resources filter

#	P6 field name in dropdown	P6 field name in Power Client	Data Type
1	AutoComputeActuals	Auto Compute Actuals	Flag
2	CalculateCostFromUnits	Calculate Cost From Units	Flag
3	CalendarName	Calendar	ValueList
4	CurrencyId	_	ValueList
5	CurrencyName	Currency Name	ValueList
6	DefaultUnitsPerTime	Default Units / Time	Integer
7	EmailAddress	E- Mail address	Text
8	EmployeeId	Employee ID	Text
9	Id	Resource Id	Text
10	IsActive	_	Flag
11	IsOverTimeAllowed	_	Flag
1	LastUpdateDate	_	Date

2			
13	LastUpdateUser	–	Text
14	MaxUnitsPerTime	–	Integer
15	Name	Resource Name	Text
16	OfficePhone	Office Phone	Text
17	OtherPhone	Other Phone	Text
18	OvertimeFactor	–	Integer
19	PricePerUnit	–	Integer
20	PrimaryRoleId	–	Text
21	PrimaryRoleName	Primary Role	Text
22	ResourceType	–	ValueList
23	SequenceNumber	–	Integer
24	TimesheetApprovalManager	Timesheet Approval Manager	Text
25	Title	Title	Text
26	UserName	–	Text
27	UseTimesheets	–	Flag

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