

Primavera Portfolio Management

Bridge for Primavera P6 Data Mapping and Data Flow Guide



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1

Overview

The Oracle Primavera Portfolio Management (PPM) Project Management Bridge to Primavera P6 (PM Bridge) enables a seamless, bi-directional transfer of project information between PPM and P6.

The purpose of mapping PPM items to P6 projects, is to ensure that the project and item data will always remain in sync between the two applications.

The PM Bridge for P6 can operate in two different mapping modes: sub-items or phases. Although both modes map P6 projects to PPM items, they differ in terms of the 2nd level WBS mappings. In the sub-items mode, 2nd level WBSs are mapped to the item's sub-items, while in the phases mode these WBSs are mapped to the item's phases.

The process of transferring item data from PPM to P6 is called publishing, while the process of transferring project data from P6 to PPM is called updating.

When an item is published for the first time, the PM Bridge creates a new project in P6 and maps it to the item. In the most basic configuration, the system creates tasks in the new project plan based either on the item's sub-items or life cycle phases, depending on whether the bridge is operating in the sub-items or phases mapping mode. In methodology-based configurations the new PPM item-generated project can be created on the basis of a P6 methodology. In the phases mode, the system may be configured to publish from PPM and update from P6 PPM item, phase and deliverable schedule information. In addition, PPM categories can be mapped to P6 fields and codes in either mapping mode, thereby supporting the transfer of category information between the two systems.

Note

P6 removed the Methodology Manager module in version 8. If your P6 version is later than version 8, you will not be able to use methodologies.

Publishing and updating can be initiated by users for specific items or for a batch of items that are collected in a portfolio. They can also be initiated automatically by the system according to a schedule. This is done by using the sync operation set by the administrator.

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Publishing Items

When an item is published for the first time, the system creates a new project in P6 with the same name as the item.

The item and project are now linked, or “mapped,” and can share information. This shared information typically becomes the basis for a more detailed project plan.

The Basic Elements of a Published Project

A published project’s actual content depends on whether this project is based on the content of the original PPM item or on a P6 methodology that reflects standard project-related processes in the organization.

PPM Item

If based on a PPM item, depending on the mapping mode, it can be based on either the item’s sub-items or its life cycle phases, as follows:

- **Sub-Items** - the project plan becomes populated with WBS elements which are created corresponding to the published item’s sub-items for the sub-item type selected.

Note

If the item has no sub-items for the sub-item type selected, then the item will be published as a project without any additional elements.

Each newly created WBS is named after the corresponding sub-item in PPM. Existing WBSs are matched by name to published sub-items from PPM. Once WBSs are matched to sub-items, they have become permanently mapped to each other for future updates. The renaming of either one will not break the mapping. In all publish operations, data will be published from PPM categories mapped as publishing to their corresponding project fields or codes for the mapped item, and to WBS fields for 2nd level WBS elements matching PPM sub-items.

Note

If no PPM categories are mapped to P6 fields, no data is published (not even start and end dates).

- **Phases** - the project plan becomes populated with WBS elements and milestone activities based on the item’s life cycle information in PPM.

Note

If a life cycle was not assigned to the item, then it will be published as a project without any other content.

Specifically, under the project level WBS element, several active WBS elements are created, corresponding to and named after, the mapped item's phases. These WBS elements will be mapped to the corresponding phases for future updates. They also include the original planned dates of each phase, as recorded in PPM.

Note

If a life cycle was not assigned to the item, then it will be published as a project without any other content.

P6 Methodology

If based on a P6 methodology, the system creates a project plan populated with the WBS elements and activities with their fields and codes as prewritten in the methodology. In addition depending on the mapping mode, the system will know how to match up WBS elements with their identically-named PPM entities, as follows:

Note

This can be done either by defining the WBS elements in the methodology according to the sub-item names or phase names in PPM, or by naming new PPM sub-items or phases according to the WBS elements in the P6 methodology.

- **Sub-Items Mapping Mode** - If there are WBS elements in the selected P6 methodology whose names are identical to those of the sub-items of the published PPM item, the bridge will map these WBS elements to the corresponding sub-items thus enabling the sharing of sub-item information.
- **Phases Mapping Mode** - If there are WBS elements in the selected P6 methodology whose names are identical to those of the phases in the PPM item's life cycle, the bridge will map these WBS elements to their corresponding phases, thus enabling the sharing of phase and deliverable schedule information.

This methodology, which determines how new projects are created, can be selected in one of two ways:

Manually by the end-user: In this case, the administrator provides the user with a form or a scorecard in PPM containing a field that allows the user to select the name of the P6 methodology that user wants to use.

Automatically by the system: When no P6 methodology has been manually selected, the system will automatically select a default methodology.

Note

If a user has manually selected a methodology, this selection will override the system's automatic selection.

This selection is dependent on the mapping mode in use, as follows:

- **Sub-Items Mapping Mode:** For this mode, the default methodology is the one defined for the server, on the sub-items mode defaults step in the Bridge Server Settings Wizard.

- **Phases Mapping Mode:** In this mode, the system will select the P6 methodology whose name is identical to that of the life cycle of the published PPM item. (This requires the administrator to pre-set the life cycle names in PPM to match the names of the P6 methodologies.)

If no methodology was selected either manually or automatically, the WBS structure of the published item will be either empty if in the sub-items mode or will reflect the item's phases if in the phases mode.

Default Bridge Settings when Publishing PPM Items

The defaults step of the Bridge Server Settings Wizard supports setting the mapping mode of the bridge and the addition of item reference information to the newly created project plan.

This step also includes the P6 project field to be hyperlinked to PPM field which will contain the URL to the PPM item that is linked to the P6 project, and the default EPS node for new projects field for determining the EPS location of new projects.

Setting the Mapping Mode of an Item

An item is published according to one of two mapping modes; sub-items or phases.

- This mapping mode can be set per item via the mapping mode category located in the Project Management Bridge Administration scorecard/workbook, or on the sub-items configuration tab of the Project Management Bridge Administration & Configuration form.
- If this category has not been assigned a value, then the corresponding mapping mode server default found on the defaults step of the Bridge Server Settings Wizard will determine the mapping mode for each item published to that server.
- If the mapping mode server default has been set to **Either Phases or Item (User Selectable)** and the mapping mode category has been left blank, then when publishing the item for the first time, the user will be prompted to select a mapping mode.

Item Start Date and End Date References

The bridge can be configured to include the PPM item start and end dates.

Under the project level WBS element, two milestone activities will be created: **Start Date reference from Primavera Portfolio Management** and **End Date reference from Primavera Portfolio Management**. These will reflect the start and end dates of the mapped item and will show up on the gantt chart. They can also be configured to be updated in future publish operations.

The bridge can be configured to include these start and end date references regardless of whether the sub-items or phases mapping mode is being used to publish the item.

In addition to the item start and end date references, each of the mapping modes has its own unique publishing defaults.

Setting Sub-Items Mode Publishing Defaults

Sub-Item Type

Any publishing (or updating) of items in the sub-items mode will affect only those sub-items of the type defined in the sub-items type category found on the sub-items configuration tab of the Project Management Bridge Administration & Configuration form. If this category has not been

assigned a value, then the corresponding sub-items type server default found on the sub-items mode defaults step of the Bridge Server Settings Wizard will determine which sub-item type will be published.

Publishing Parameters

When a PPM item is published as a P6 project in the sub-items mapping mode, the resulting WBS structure and subsequent data modification of the WBS elements can be controlled by the three publish categories found on the sub-items configuration tab of the Project Management Bridge Administration & Configuration form.

If these categories have not been assigned values, the three corresponding publish server defaults found on the sub-items mode defaults step of the Bridge Server Settings Wizard will control the WBS structure and data modification.

These three independent, binary categories (or server defaults), control the following publishing behaviors:

- Create a new WBS element for each new sub-item – If Yes (or checked), for each new sub-item in PPM a new WBS element matching this sub-item will be created in P6. Any data contained in this sub-item will also be published to the corresponding fields in the matching WBS element.
- Remove any WBS element which lacks a corresponding sub-item – If Yes (or checked), WBS elements who no longer have matching PPM sub-items will be deleted together with all of their data.
- Publish data fields of existing projects and WBS elements – If Yes (or checked), any existing data for projects or WBS elements already mapped to PPM items and/or their sub-items will be overridden by the current item and/or sub-item data.

Master of the Sub-Item Name

When a WBS element becomes mapped to a sub-item, each receives the same internal ID. This makes this mapping permanent such that the subsequent renaming of the sub-item in PPM or its corresponding WBS element in P6 will not break this mapping.

The sub-items name defined by default found on the sub-items mode defaults step of the Bridge Server Settings Wizard defines, per server, whether the names of the sub-items and their corresponding WBSs are controlled by PPM or by P6. When PPM controls the naming, if a sub-item already mapped to a WBS element is renamed, the name of the corresponding WBS element will also change accordingly when this sub-item is re-published. This feature preserves the identity of the names of the sub-items and their corresponding WBSs even when changed in one of the applications.

Setting Phases Mode Publishing Defaults

Phase Start Date and End Date References

The bridge can be configured so that the original PPM phase schedule dates can be published.

- Under the project level WBS element, a phases reference WBS element named Primavera Portfolio Management Phases is created. Under this WBS element, additional WBS elements named after the respective phases of the item with the addition of the word Reference, are created. These reference WBS elements will not be updated in future publish operations.

- Each of these WBS elements corresponding to phases includes two milestone activities: Plan Start Date Reference and Plan End Date Reference which represent the initial start and end dates of the published phase.

Deliverables

Another setting supports the publishing of PPM deliverables. For each deliverable in the item's phases, a finish milestone activity is created and assigned to the WBS element representing that phase.

- **Project Name** - The new project Accounts (ERP) has the same name as the published item.
- **Deliverable Milestones** - A finish milestone activity is created on the gantt chart for each deliverable published from PPM, such as the milestone displayed for concept analysis.
- **Date References** – These milestones refer to the initial start and end dates of the item.
- **Phases** – These WBS elements (WBS: Concept, WBS: Delivery, and WBS: Plan) have the same names as the PPM item's life cycle phases (Concept, Delivery, and Plan). WBS elements with the same name as phases of the item in PPM are automatically mapped to these phases. These WBS elements mark the forecast start and end dates of each phase, as recorded in PPM.
- **Phase References** – This refers to the WBS: Primavera Portfolio Management Phases element. This is used to reference the original schedule for the phases, as published during the initial publishing of the item. This WBS element contains additional WBS elements per phase. Each of these latter WBS elements contains phase start and end date reference milestones, which mark the original planned dates of the phases, as recorded in PPM. They do not change during subsequent publishing.

Publishing Portfolios

When publishing a portfolio of items, no project is created or updated on the basis of this portfolio.

Projects are created and updated only on the basis of published items. Nevertheless, the publishing of a portfolio of items can serve as a short-hand method for publishing many items simultaneously.

Note

Portfolios of portfolios cannot be published.

There are several scenarios:

- If none of the items has been previously published, the user can specify a single project management system server as the destination for the items.
- If all items have been previously published, all projects will be updated with any new information.
- If only some items have been previously published, the user can specify a single project management system server as the destination for the items that were not yet published. All previously published items will be updated with any new information.

Note

If a portfolio contains items that were not yet published which should be mapped to different servers, the user should publish them individually, and not publish the entire portfolio. As an efficiency measure, the administrator should create query-based portfolios to collect items with different destinations and then publish each portfolio to a different project management system server.

The following sections describe how to publish PPM information to P6.

Publishing a New Item in Primavera Portfolio Management

1. Open an item while in a workbook or a form, or open a portfolio of items while in scorecard or investor.
2. From the **Tools** menu, select **Publish to PM**.

Note

The publish process has no undo feature. Once published, only a project management system administrator can remove a project by deleting it from the server.

Confirm that you want to publish the specified item or portfolio by clicking **Continue**. At this point, the system may ask the user to input additional information necessary for the publishing of this item. The destination server and mapping mode are remembered for any subsequent publishing of these items.

- **Project Management Server:** When multiple project management system servers are mapped to PPM, the user must define the server to which the item should be initially published.
 - **Mapping mode:** In addition, if the default mapping mode in which this item is supposed to be published has not been set (see [Setting the Mapping Mode of an Item](#)), the user must select the mode.
4. Click **Create and Publish**.
 5. Click **OK**.

If the publishing process experiences any errors, an error message appears. Follow the message's instructions, or see your system administrator.

Note

Subsequent publishing of item information can be done periodically through a system-wide synchronization process, referred to in PM Bridge as Sync. See your user guide for more information.

Note

An item that has the same name as an existing P6 project must be mapped before publishing. See: Importing Projects in the Primavera Portfolio Management Bridge for Primavera P6 User Guide.

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Viewing a Published Item in P6

There are three ways of viewing projects in P6:

- Connecting to P6.
- Opening the project in P6 Professional.
- Accessing information through web portlets in forms.

Note

Web portlets are a feature your system administrator can build into a PPM form, giving you a view of your project plan in P6. For more information, see [Viewing Information from the Project Management System in the Primavera Portfolio Management Bridge for Primavera P6 User Guide](#).

Viewing Published Information in P6

P6 allows you to open the web page link of the project which is linked to the item you are looking at in PPM, in P6.

1. Open a browser window and connect to P6. If you do not work with Windows Authentication, the Login window appears.
2. Log in using the username and password that was provided by your administrator and click **Go**.

The Home window appears.

3. Click **Projects** from the menu bar to verify that the project has been published.

The Projects window appears.

4. Scroll down the list of projects until you find the project that you published.

5. Click on the project name.

The project opens.

Note

The actual display can vary according to the default view.

Locating the Published Item

When an item is published for the first time, its EPS location will be determined according to the following:

- The EPS location selected in the EPS parent node category for the item about to be published. This is a value list category on the P6 Configuration tab of the Project

Management Bridge Administration & Configuration form which contains all possible EPS nodes.

- If this category is not populated or such EPS node does not exist, then the EPS location will be an EPS node with the same name as the item's home portfolio.
- If there is no EPS node with the same name as the item's home portfolio, the item will be placed in the server's default EPS which is selected on the defaults step of the Bridge Server Settings Wizard.

Updating Data from P6

The update feature transfers information from P6 to PPM. This enables the portfolio manager to monitor the progress of projects in P6 from within PPM. The update functions differently for each of the two mapping modes.

Setting Sub-Items Mode Updating Defaults

When updating from P6, information can be transferred to PPM from the following types of fields:

- Project fields
- Project codes
- Project spreadsheets
- WBS fields

In each update operation, PPM category values of mapped items and sub-items are updated with P6 field and code values and WBS values from the mapped project and WBS elements beneath.

Note

If no PPM categories are mapped to P6 fields, no sub-item data is updated in PPM, not even their start and end dates.

Updating Parameters

When updating items and sub-items that have been published in the sub-items mapping mode, the actual content of the sub-items list and their data modification can be controlled by the update categories found on the sub-items configuration tab of the Project Management Bridge Administration & Configuration form.

If these categories have not been assigned values, the corresponding update server defaults found on the sub-items mode defaults step of the Bridge Server Settings Wizard will control the WBS structure and data modification.

These independent, binary categories (or server defaults) control the following updating operations:

- **Create a sub-item for each new WBS element:** If yes (or checked), for each new WBS element in P6, a new sub-item matching this WBS will be created in PPM. Any data contained in this WBS element will also be updated to the corresponding fields in the matching sub-item.

- **Remove a sub-item on removal of its corresponding WBS element:** If yes (or checked), sub-items who no longer have matching WBS elements will be deleted, together with all of their data.
- **Update categories of existing items and sub-items:** If yes (or checked), any existing data for PPM items and/or their sub-items already mapped to projects or WBS elements will be overridden by the current project and/or WBS element data.

Master of the Sub-Item Name

When a WBS element becomes mapped to a sub-item, each receives the same internal ID. This makes this mapping permanent such that the subsequent renaming of the sub-item in PPM or its corresponding WBS element in P6 will not break this mapping.

The sub-item name defined by default found on the sub-items mode defaults step of the Bridge Server Settings Wizard defines, per server, whether the names of the sub-items and their corresponding WBSs name are controlled by PPM or by P6. When P6 controls the naming, if a WBS element already mapped to a sub-item is renamed, the sub-item's name will change to that of the corresponding WBS element when this sub-item is updated. This feature preserves the identity of the names of the sub-items and their corresponding WBS elements even when changed in one of the applications.

Setting Phases Mode Updating Defaults

When updating in the phases mapping mode, new item, phase and deliverable schedule information may be updated in PPM from P6 project and WBS fields.

When you run an update, scheduling information such as item start and end dates, phase start and end dates, phase percent completion, deliverable due dates, and deliverable completed status may receive updated information, depending upon how your system is configured. (In addition PPM categories that have been mapped to be updated from P6 project fields or codes or WBS fields will also be updated. See [Mapping Primavera Portfolio Management Categories and P6 Fields and Codes](#))

You can access the update command from the Investor, Scorecard, Workbook, Forms, and Dashboard modules. You can update a single project, or an entire portfolio of projects. Since the update feature works in tandem with the publish process, you can update only from a project in P6 that has previously been mapped to a PPM item.

Note

The categories to be updated are selected in advance by your system administrator. For information about which categories are updated, speak to your system administrator.

Updating Phase and Deliverable Information

When updating from P6, defaults may be set so that new phase information and deliverable schedule information may be updated in PPM.

Phase Information

Date-associated activity information is updated from second level WBS elements that are mapped to Primavera Portfolio Management start and end dates. The update process searches for item phases that match the project's second level WBS names. If your

administrator has elected to update phase information to Primavera Portfolio Management, the update process copies new WBS information to Primavera Portfolio Management when it finds an exact phase name match. The following table shows the phase fields that are updated.

P6 WBS Field	PPM Phase Field
BL1 Start date	Planned Start date
BL1 Finish date	Planned End date
Start date	Forecast Start date
Finish date	Forecast End date
Actual Start date	Actual Start date
Actual Finish date	Actual End date
Performance % Complete	% Complete

Deliverables Information

When PPM Deliverables are mapped to P6¹, the bridge can be set such that changes in the start and finish dates or Activity % Complete of the corresponding milestone activity in P6 will be reflected respectively in the deliverable Due Date and Completed² fields in PPM during the next manual update or sync operation. The following table shows the deliverable fields that are updated.

P6 Milestone Field	PPM Deliverable Field
Start and finish dates	Due Date
Activity % Complete	Completed

The following sections describe how to update PPM information from P6.

To update from P6:

1. Navigate to the item or portfolio of items you want to update. You may wish to note the phase and other updateable information.
2. From the **Tools** menu, select **Update from PM**. A confirmation dialog box appears.
3. Click **Continue**. A progress indicator appears.
4. After the update process is finished, one of two types of messages appear:
 - **Update succeeded:** All information was updated successfully.
 - **Update failed** (or some of the information failed to update): In this case, follow the instructions in the message.

Note

You will receive an error message if some of the selected items are not mapped to a project.

5. Click **OK** to close the dialog box. The project is now updated.

¹ Either because the initial publishing of the item was based on the PPM items phase and deliverable content, or if published based on a P6 methodology, where the methodology contains a WBS element with a milestone activity which are named identically as one of the item's phases and its deliverable, respectively.

² If the deliverable milestone percent complete in project is 100% then the Deliverable Completed checkbox in PPM is checked. If the percent complete is less than 100%, the checkbox is not checked.

Mapping Primavera Portfolio Management Categories and P6 Fields and Codes

The PPM Bridge for Primavera P6 can synchronize PPM categories with P6 project fields, project codes, WBS fields and spreadsheet data, thereby supporting the transfer of category information between the two systems³.

Administrators first need to define which categories participate in publish and which in update. Each of these categories must be mapped to a field or project code in P6.

Categories that are set to publish can be mapped to either P6 project fields or project codes of a matching data type. (In the Sub-Items Mapping Mode, WBS fields are also available.) During the publishing process, the mapped P6 field or code will be updated with new information from PPM. If no project is currently mapped to a published item, the system creates a new project in P6.

Categories that are set to update can be mapped to either P6 project fields, project codes or spreadsheet fields of matching data types. (In the Sub-Items Mapping Mode, WBS fields are also available.) During the update, the category will be updated with new information coming from the field to which it is mapped in P6.

Unidirectional Data Sharing Principle

For each field or category, data is shared in only one direction. A PPM category that is used to publish information to P6 cannot be updated with information from P6. A PPM category that gets updated by information from P6 cannot be set to publish information to P6. Similarly, P6 fields that update their data to PPM categories cannot receive data from PPM, and P6 fields that receive data from PPM cannot be set to update categories.

Note

Though it is technically possible to enter information manually into a category that gets updated from P6, this information is overwritten the next time P6 updates PPM.

If in certain projects you want the information in a specific category to be derived from P6, while in other projects you want information to be entered directly into PPM, use a master category technique. For example: If you want some projects to display a planned start date as it is entered by the project manager in P6, and in other projects you want this date to be entered directly into PPM, do the following:

1. Create a category called **P6 Planned Start Date** to receive the planned start date from P6.
2. Create another category called **PPM Planned Start Date** to receive the start date, as entered in PPM.
3. Create a category called **Master Source** that allows a user to select P6 or PPM from a value list.

³ Although in the Phases Mapping Mode, PPM phase and deliverable schedule and completion data can be transferred to P6 without mapping PPM categories to P6 fields and project codes, in the Sub-Items Mapping Mode, no data will be transferred without mapping categories to P6 fields.

4. Create a category called **Planned Start** with a function that determines whether to get the category value from **P6 Planned Start Date** or **PPM Planned Start Date**, based on the **Master Source** category.

Types of P6 Fields That can be Mapped to Primavera Portfolio Management Categories

It is important to be familiar with the following P6 field types and understand how they can be mapped to PPM categories

Project fields contain project data. There are two kinds of project fields: built-in and user-defined. Most of the built-in fields reflect summarization of data from the WBS (Work Breakdown Structure). These fields can only be updated. The built-in fields which are not summarized and all of the user-defined project fields can be mapped for either publishing or updating. Project fields are available for both the sub-items and phases mapping modes.

Project codes are a special type of field used to classify projects into groups. These codes are used in P6 to sort or filter the projects. There are both predefined and user defined codes. Both are available for both publishing and updating. Project codes are available for both the sub-items and phases mapping modes.

Spreadsheets enable the P6 user to obtain a breakdown of built-in project fields by resource and time slices (such as cost 2008 per a selected resource). Spreadsheets are available for updating only. Accordingly, each built-in project field can be mapped to a PPM category while specifying a calendar period and a resource filter by which to breakdown the data. Spreadsheets are available for both the sub-items and phases mapping modes.

WBS fields contain data of WBS elements. There are two kinds of WBS fields: built-in and user-defined. Most of the built-in fields reflect summarization of data from the WBS and activities underneath. These fields can only be updated. The built-in fields which are not summarized and all of the user-defined WBS fields can be mapped for either publishing or updating. WBS fields are available for the sub-items mapping mode only.

Mapping the Publish Fields: the Publish Step

The publish step for either of the mapping modes in the Bridge Server Settings Wizard, enables the administrator to set system-wide policies for mapping PPM categories to P6 fields and codes. This step supports the mapping to three different types of P6 fields or codes in the sub-items mode and two different types in the phases mode, as follows:

- Project fields
- Project codes
- WBS fields (sub-items mode only)

The publish step accordingly, includes two or three tabs.

Project Fields Tab

The Project Fields tab, available for both the sub-items and phases modes, enables the administrator to map data from categories of the original PPM item to project fields of the mapped P6 project.

To map PPM categories to P6 project fields:

1. On the **Publish** step (of the selected mapping mode), select a category from the **Primavera Portfolio Management Categories** tab tree.

2. Select a field from the **P6 Project Fields** drop-down list to which the category should be mapped.

Project Codes Tab

The Project Codes tab, available for both the sub-items and phases modes, enables the administrator to map data from categories of the original PPM item to project codes of the mapped P6 project.

To map PPM categories to P6 project codes:

1. On the **Publish** step (of the selected mapping mode), select a category from the **Primavera Portfolio Management Categories** tab tree.
2. Select a field from the **P6 Project Codes** drop-down list to which the category should be mapped.

WBS Fields Tab

The WBS Fields tab, available for the sub-items mode only, enables the administrator to map categories of sub-items, to the WBS fields of the WBS elements to which these sub-items are mapped.

To map PPM categories to P6 WBS fields:

1. On the **Publish** step, select a category from the **Primavera Portfolio Management Categories** tab tree.
2. Select a field from the **P6 WBS Fields** drop-down list to which the category should be mapped.

Mapping the Update Fields – the Update Step

The update step for either of the mapping modes in the Bridge Server Settings Wizard enables the administrator to set system-wide policies for mapping P6 fields and codes to PPM categories. This step supports the mapping from four different types of P6 fields or codes in the sub-items mode while from only three different types in the phases mode, as follows:

- Project fields
- Project codes
- Spreadsheets
- WBS fields (sub-items mode only)

The update step accordingly, includes three or four tabs.

Project Fields Tab

The Project Fields tab, available for both the sub-items and phases modes, enables the administrator to map project fields of the mapped P6 project to categories of the original PPM item.

To map P6 project fields to PPM categories:

1. On the **Project Fields** tab, select a field from the **P6 Project Fields** drop-down list.
2. Select a category from the **Primavera Portfolio Management Categories** tab tree to which the field should be mapped.

Project Codes Tab

The Project Fields tab, available for both the sub-items and phases modes, enables the administrator to map project fields of the mapped P6 project to categories of the original PPM item.

To map P6 project codes to PPM categories:

1. On the **Project Codes** tab, select a field from the **P6 Project Codes** list.
2. Select a category from the **Primavera Portfolio Management Categories** tab tree to which the field should be mapped.

Spreadsheets Tab

P6 spreadsheets allow project data breakdown by time and resource. The spreadsheets tab available, for both the sub-items and phases modes, enables the administrator to map this information from a P6 project to categories of the original PPM item.

To map the P6 spreadsheets fields to PPM categories:

1. On the **Spreadsheets** tab, select a field, such as Actual Cost, from the **P6 Spreadsheet Fields** list.
2. Click on the corresponding **Filter** cell.

The **Filter** window opens, displaying time and resource information for the selected field.

3. In the **Time** section, select from the **Period** list the time period for which the cost or work should be calculated. The options are:

- All
- Year: where the specific year must also be selected
- Quarter: where the specific year and quarter must also be selected
- Month: where the specific year and month must also be selected

• **Note**

If you want to select more than one slice of time, for example, two separate years 2015 and 2018, you can map the Actual Cost field to two separate categories in PPM, for example, Cost 2015 and Cost 2018.

4. In the **Resource** section, select the extent of resources for which you would like to have the cost or work summarized. The options are:
 - All Resources: Total cost or work for the project
 - Select Resource: Total cost or work for a particular resource, as specified by the resource field and value fields. In Resource Field you can select any P6 project resource field. In Value, you can enter the value by which the system will filter the selected resource field. For example, an administrator who wants to create a category called Programmers Actual Cost can create a resource field in P6 called Resource Skill. Under this field, all skill types in the organization (such as programmers, DBAs, and MIS) can be listed. Then the field name can be specified in resource field and Programmers can be entered in the value field.
5. Click **OK**.

The Filter dialog will close and the filter cell will be updated with time period and resource information accordingly.

6. Select a category from the **Primavera Portfolio Management Categories** tab tree to which the field should be mapped.

WBS Fields Tab

The WBS Fields tab, available for the sub-items mode only, enables the administrator to map WBS fields of those WBSs that were originally mapped to PPM sub-items, to the categories of these sub-items.

To map P6 WBS fields to PPM categories:

1. On the **WBS Fields** tab, select a field from the **P6 WBS Fields** list.
2. Select a category from the **Primavera Portfolio Management Categories** tab tree to which the field should be mapped.

4

Support for WBS levels beyond 2 in the Bridge for P6

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

WBS Support

Note

Mapping of WBS elements beyond level 2 is only supported in sub-items mode.

P6 WBS elements of level 2 and beyond are supported by the bridge. Level 2 WBS elements can be updated (that is, sent from P6 to PPM) or published (sent from PPM to P6). WBS elements beyond level 2 can only be updated (sent from P6 to PPM)

Default mode is defined per P6 server on the **Bridge Server Settings** dialog.

Mode can be overridden per project/item on the **Bridge Administration & Configuration** form.

How Mapping Works

WBS Elements are mapped to sub-items in PPM, and shown as dynamic list rows in PPM forms. In one P6 project, all WBS elements of a given WBS level are mapped to the same dynamic list.

Mapping the Sub-Item Type

In a P6 project, all WBS elements of a given level are mapped to the same dynamic list.

For WBS elements of level 2, the default mapping is defined per P6 server on the Bridge Server Settings dialog. Mapping can be overridden per project/item on the Bridge Administration & Configuration form.

For WBS elements of level 3 and beyond, mapping is defined per project/item on the Bridge Administration & Configuration form, on the SUB-ITEM: WBS LEVEL 3+ tab.

The SUB-ITEM: WBS LEVEL 3+ Tab

For new (or newly imported) items, this tab starts out empty.

1. Add a line for each WBS of level 3 or beyond that you wish to map to PPM.
2. Submit the form to save settings (settings apply for the selected item only)
3. After submitting the form, verify that there are no input validation errors (green indicator). Errors such as using the same sub-item type for two lines will show here.

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

Name Mapping

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

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

Category Mapping

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

Changes in Bridge Server Settings Dialog

Select sub-items mode.

Defaults set on the sub-items mode screen only apply to WBS elements of level 2. Settings for WBS elements beyond level 2 are done for each item individually on the Bridge Administration and Configuration form.

The default sub-item type for WBS elements of level 2 is Contracts.

Only names of level 2 WBS elements can be controlled by PPM (during publish). Names of WBS elements of all levels can be controlled by P6 (during update).

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

P6 WBS field mappings are relevant only for WBS elements of level 2. No data is published from PPM to P6 for WBS elements beyond level 2.

PPM Categories, WBS fields, and WBS spreadsheets are relevant across all WBS levels.

Note

In P6, the default setting is that spreadsheet data is calculated (summarized) only for WBS level 2. The WBS levels for which data is summarized, is set in P6 per project.

Appendices

A

Appendix 1: Elements and Data Transferred in the PPM Sub-Items Bridge for P6

	Initial Publish (new item) (from PPM to P6)	Subsequent Publish (mapped item) (from PPM to P6)	Update Item (from P6 to PPM)
Basic bridge (without defaults, methodology, or mappings)	Item Project Elements 1. Item Project (with same name as item) 2. Sub-items (if exists) per sub-item WBS element named after the sub-item Item Project Data 3. Item start date Project Anticipated Start field.		
Methodology (without defaults)	Item Project elements 1. Item Project (named after the item, but defined by the selected template)		
Defaults	Item Project Elements 1. Initial item start date start date reference from PPM project milestone 2. Initial item end date end date reference from PPM project milestone 3. New sub-item (with data) New 2nd level WBS element (with data) 4. Removed sub-item Removed corresponding 2nd level WBS element Item Project Data 5. Item start and end dates ¹ 6. Item + sub-item category data updates Mapped project and 2nd level WBS fields ² Link to PPM 7. PPM Workbook link ³	Item Project Elements 1. New sub-item (with data) New 2nd level WBS element (with data) 2. Removed sub-item Removed corresponding 2nd level WBS element Item Project Data 3. Item start and end dates ⁴ 4. Item + sub-item category data updates Mapped ⁵ Project and 2nd level WBS fields Link to Primavera Portfolio Management 5. PPM workbook link ⁶	Project Item Elements 1. New 2nd level WBS element (with data) New sub-item (with data) 2. Removed 2nd level WBS element Removed corresponding sub-item Project Item Data 3. Project and 2nd level WBS field updates mapped ⁷ Item and sub-item categories.

	Initial Publish (new item) (from PPM to P6)	Subsequent Publish (mapped item) (from PPM to P6)	Update Item (from P6 to PPM)
Mappings	Item Project Data 1. PPM category P6 project field 2. Primavera PPM category P6 project code Sub-Item WBS Data 3. PPM category P6 WBS field	Item Project Data 1. PPM category P6 project field 2. PPM category P6 project code Sub-Item WBS Data 3. PPM category P6 WBS field	Project Item Data 1. P6 project field PPM category 2. P6 project code PPM category 3. P6 spreadsheet PPM category WBS Sub-Item Data 4. P6 WBS field PPM category

- ¹ This data is mapped to the start & finish fields of the start date reference from PPM and the end date reference from PPM project milestones, respectively.
- ² If no publish mappings have been made from PPM categories to P6 project and WBS fields, no PPM item or sub-item data will be published to P6 except for item start and end dates.
- ³ This data is mapped to the P6 Project Website URL field.
- ⁴ This data is mapped to the start and finish fields of the start date reference from PPM and the end date reference from PPM project milestones, respectively.
- ⁵ If no publish mappings have been made from PPM categories to P6 project and WBS fields, no PPM item or sub-item data will be published to P6 except for item start and end dates.
- ⁶ This data is mapped to the P6 Project Website URL field.
- ⁷ If no update mappings have been made from P6 fields or codes to PPM categories, no P6 project or WBS data will be updated to PPM.

B

Appendix 2: Elements and Data Transferred in the PPM Phases Bridge for Primavera P6

	Initial Publish (new item) (from PPM to P6)	Subsequent Publish (mapped item) (from PPMto P6)	Update Item (from P6 to PPM)
Basic Bridge (without defaults, methodology, or mappings)	Item Project Elements 1. Item Project (named after the item) 2. Phase (if exists) per phase WBS element named after the phase ¹ Item Project Data 3. Item start date Project Anticipated Start field 4. Phase Start ² and end dates ³		
Methodology (without defaults or mappings)	Item Project Elements 3. Item start date Project Anticipated Start field 4. Phase start and end dates Item Project Elements 1. Item Project (named after the item, with the entire WBS defined by the selected methodology)		

	Initial Publish (new item) (from PPM to P6)	Subsequent Publish (mapped item) (from PPM to P6)	Update Item (from P6 to PPM)
Defaults	Item Project Elements 1. Initial item start date start date reference from PPM project milestone 2. Initial item end date end date reference from PPM project milestone 3. Initial phase date references PPM phases WBS element which includes a single reference WBS element named after the phase⁴, per phase 4. Deliverable Milestone activity named after the deliverable included in the WBS element named after its respective phase Item Project Data 5. Item start and end dates⁵ 6. Initial phase start and end date references⁶ 7. Deliverable due date⁷ Link to PPM 8. PPM workbook link⁸	Item Project Elements 1. (New) deliverable (new) milestone activity after the deliverable included under the WBS element named after its respective phase Item project data 2. Item start and end dates⁹ 3. New deliverable due date¹⁰ Link to PPM 4. PPM workbook link¹¹	Project Item Data P6 WBS element Fields PPM phase fields¹² 1. BL1 Start and Finish dates Planned Start & End dates. 2. Start and finish date Forecast Start and End dates. 3. Actual Start and Finish dates Actual Start and End dates 4. Performance % Complete % Completed P6 Milestone Fields PPM Deliverable Fields¹³ 5. Start and finish dates due date 6. Activity % Complete Completed¹⁴
Mappings	Item Project Data 1. PPM category P6 project field 2. PPM category P6 project code	Item Project Data 1. PPM category P6 project field 2. PPM category P6 project code	Project Item Data 1. P6 project field PPM category 2. P6 project code PPM category 3. P6 spreadsheet PPM category

¹ This WBS element includes the Planned Phase Duration WBS element which itself includes Planned Phase Start Date and Planned Phase End Date milestone activities.

² Uses forecast dates if they exist. Otherwise planned dates and if there are no planned dates, today's date. Never uses actual dates.

³ This data is mapped to the start and finish fields of the Planned Phase Start Date and Planned Phase End Date milestone activities respectively.

⁴ This WBS element includes start date reference and end date reference milestone activities each named after the phase.

⁵ This data is mapped to the start and finish fields of the start date reference from PPM and the end date reference from PPM project milestones, respectively.

⁶ This data is mapped to the start and finish fields of start date reference and end date reference milestone activities named after the phase, respectively.

⁷ This data is mapped to the start and finish fields of the milestone named after the deliverable.

⁸ This data is mapped to a P6 project website URL field.

⁹ This data is mapped to the start and finish fields of the start date reference from PPM and the end date reference from PPM project milestones, respectively.

¹⁰ This data is mapped to the start and finish fields of the milestone named after the deliverable.

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- 1 This data is mapped to a P6 project website URL field.
- 1
- 1 This assumes that the WBS element is mapped to the PPM phase. There are two different ways to publish a PPM
- 2 item so that its phases are mapped to corresponding WBS elements in P6: Either by publishing the item together
- 2 with its phases (basic bridge above), or by publishing an item based on a P6 methodology that contains WBS
- 2 elements identical in name to those of the phases of the original item.
- 1 This assumes that this P6 milestone activity is mapped to a PPM deliverable. This is the case only if the summary
- 3 task in which this milestone appears is mapped to the phase of the deliverable, and there is a milestone with the
- 3 same name as that of the deliverable.
- 1 Only if the Activity % Completed of the milestone is 100% will the deliverable's completed field be checked.
- 4

Glossary

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