

Oracle® Construction and Engineering

Integrate Oracle Primavera Cloud Resources and Project Data with Primavera P6 EPPM



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Preface

This document describes how to install, configure, and run this accelerator in Oracle Integration 3.

Documentation Accessibility

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Related Resources

For more information, see these Oracle resources:

- Oracle Cloud at <http://cloud.oracle.com>
- *Using Integrations in Oracle Integration 3*
- *Using the Oracle Mapper with Oracle Integration 3*
- Oracle Integration documentation
- [Oracle Primavera Cloud documentation](#)
- [Oracle Primavera P6 EPPM documentation](#)

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

Convention	Meaning
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

About This Accelerator

Use this accelerator to integrate Oracle Primavera Cloud resources and project data with Primavera P6 EPPM.



Note:

This accelerator is available as **Oracle Primavera Cloud — Primavera P6 EPPM | Integrate Resources and Project Data** in the Integration Store.

Overview

The accelerator delivers a project that includes the following integrations:

Global level integrations:

- **P6 to Oracle Primavera Cloud Resource Sync:** Used to sync an Oracle Primavera Cloud workspace with resource and calendar data from Primavera P6 EPPM.
- **P6 to Oracle Primavera Cloud Role Sync:** Used to sync an Oracle Primavera Cloud workspace with role data from Primavera P6 EPPM.
- **P6 to Oracle Primavera Cloud Resource Role Sync:** Used to sync an Oracle Primavera Cloud workspace with resource, role, and calendar data from Primavera P6 EPPM.

Project level integrations:

- **P6 to Oracle Primavera Cloud Project Schedule Sync:** Used to sync a project from Primavera P6 EPPM to Oracle Primavera Cloud with project schedule data, UDFs, and codes.
- **Oracle Primavera Cloud to P6 Project Schedule Sync:** Used to sync a project from Oracle Primavera Cloud to Primavera P6 EPPM with project schedule data, UDFs, and codes.
- **Oracle Primavera Cloud to P6 Project Task Sync:** Used to sync a project from Oracle Primavera Cloud to Primavera P6 EPPM with WBS, activity, task, UDFs, and codes.
- **P6 to Oracle Primavera Cloud Project Risk Sync:** Used to sync a project from Primavera P6 EPPM to Oracle Primavera Cloud with risk data, such as risk matrices, risk thresholds, and activity risks.

You can choose to run whichever integrations you want. Each integration can be run independently of the others.

To use one of these integrations, you need to install the accelerator, configure the connections, activate the integration, update the integration properties, and finally run the integration.

System and Access Requirements

- Oracle Integration 3

- Oracle Primavera Cloud
- Oracle Primavera P6 EPPM
- Oracle Primavera Cloud user account with administrative privileges
- Oracle Primavera P6 EPPM user account with administration role

2

Before You Install the Accelerator

You must perform the following configuration tasks on your Oracle Primavera Cloud and Primavera P6 EPPM instances to connect to these external systems using Oracle Integration and integrate resources, roles, rates, activities, assignments, and spreads.

Configure Oracle Primavera Cloud

To configure Oracle Primavera Cloud, complete the initial setup outlined below:

- **Create an Integration User Account:** You can create an integration user account in Oracle Primavera Cloud to connect with Oracle Integration and manage integrations. Specify the integration account email address in the integration properties to receive integration notifications. Creating an integration account is optional but recommended to keep track of the data modified through integrations and to avoid issues related to using a standard user account, such as account lockouts or the employee leaving the organization. For details, see [Setting up an Integration User Account](#).
- **Create or Use an Existing Workspace:** Workspaces represent the hierarchical structure of your organization's businesses, projects, or processes. Create a new workspace or use an existing one to integrate Oracle Primavera Cloud activities, assignments, roles, and resources with Primavera P6 EPPM. For details, see [Add a Workspace](#).
- **Create or Use an Existing Project:** A project is a formalized plan undertaken to create a service, product, or result. Projects may consist of various other details, including activities and assignments. Create a new project or use an existing one to integrate its activities, assignments, roles, and resources with Primavera P6 EPPM. For details, see [Add a Project](#).

Configure Primavera P6 EPPM

To configure Primavera P6 EPPM for this integration, complete the initial setup outlined below:

- **Create an Integration User Account:** You can create an integration user account in Primavera P6 EPPM to connect with Oracle Integration and manage integrations with Oracle Primavera Cloud. Creating an integration account is optional but recommended to keep track of the data modified through integrations and to avoid issues related to using a standard user account, such as account lockouts or the employee leaving the organization. See [Creating User Accounts for P6 EPPM](#).
- **Create an EPS Location:** Enterprise project structure (EPS) elements represent the hierarchical positions of all the projects in your database. You can create sibling EPSs to represent those that are hierarchically equal, or child EPSs to represent those that are subordinate. You must create the EPS structure before synchronizing Primavera P6 EPPM and Oracle Primavera Cloud projects. See [Creating EPS Elements](#).
- **Add a Project:** You must add at least one project in Primavera P6 EPPM before synchronizing Primavera P6 EPPM and Oracle Primavera Cloud projects. See [Creating Projects](#).
- **Create User-Defined Fields:** User-defined fields (UDFs) allow you to create and maintain data specific to your organization. Create project UDFs before synchronizing Primavera P6

EPPM and Oracle Primavera Cloud projects. See [About User Defined Fields](#) and [Creating Project UDFs](#).


- **Create and Assign Codes:** Codes help you track different projects based on attributes they share. You must create and assign codes to your Primavera P6 EPPM projects before synchronizing Primavera P6 EPPM and Oracle Primavera Cloud projects. See [Creating Project Codes](#) and [Assigning Project Codes](#)

3

Install and Configure the Accelerator

On your Oracle Integration instance, install the accelerator to deploy the project. Once installed, you can configure the delivered connections and integrations.

Install the Accelerator

1. On the Oracle Integration Home page, in the **Get Started** section, click **Browse store**.
2. Search for this accelerator:
Oracle Primavera Cloud — Primavera P6 EPPM | Integrate Resources and Project Data
3. After you find the accelerator, click **Get** on the accelerator card.
A message confirms that the accelerator was successfully installed, and the accelerator card shows **In Use**.
4. Click **Configure**  on the accelerator to configure its resources.
The project workspace opens, displaying all the resources of the accelerator.


After installing the accelerator, and before you can run the integrations, you need to configure the two delivered connections which are used in each integration:

- **Oracle Primavera Cloud Connection** - Uses the Oracle Primavera Cloud Adapter to connect to Oracle Primavera Cloud.
- **Oracle Primavera P6 EPPM Connection** - Uses the Oracle Primavera P6 EPPM Adapter to connect to Primavera P6 EPPM.


Configure the Oracle Primavera Cloud Connection


1. In the **Connections** section, click **Actions** . . . next to **Oracle Primavera Cloud Connection**, then select **Edit**.
2. In the **Properties** section, in the **Connection URL** field, enter the URL of your Oracle Primavera Cloud instance.
3. In the **Security** section, do the following:
 - a. In the **Security policy** field, select **Oracle Primavera Cloud Login**.
 - b. In the **Username** field, enter the user name of your Oracle Primavera Cloud or integration user account.
 - c. In the **Password** field, enter the password of your Oracle Primavera Cloud or integration user account.
4. In the **Access type** section, select **Public gateway**.
5. Click **Save**. If prompted, click **Save** again.
6. Click **Test** to ensure that your connection is successfully configured. In the resulting dialog box, click **Test** again.

A message confirms if your test is successful.

7. To return to the project workspace, click **Go back** .

Configure the Oracle Primavera P6 EPPM Connection

1. In the **Connections** section, click **Actions**  next to **Oracle Primavera P6 EPPM Connection**, then select **Edit**.
2. In the **Properties** section, in the **Connection URL** field, enter the URL of your Oracle Primavera P6 EPPM instance.
3. In the **Security** section, do the following:
 - a. In the **Security Policy** field, select **OAuth**.
 - b. In the **Username** field, enter the user name of the integration user account.
 - c. In the **Password** field, enter the password of the integration user account.
4. In the **Access type** section, select **Public gateway**.
5. Click **Save**. If prompted, click **Save** again.
6. Click **Test** to ensure that your connection is successfully configured. In the resulting dialog box, click **Test** again.

A message confirms if your test is successful.
7. To return to the project workspace, click **Go back** .

4

Run the Integrations in This Accelerator

After you install the accelerator and configure the connections, you can run the integrations in this accelerator.

Each integration in this accelerator is designed to be run independently of the others.

For each integration you want to run, do the following:

1. First, activate the integration.
2. Then, update the integration properties.
3. Finally, run the integration, either manually or using a schedule.

The following procedures describe how to run each integration manually. To learn how to schedule an integration to run at a specific date, time, and frequency, see [Define the Integration Schedule](#).

Run the P6 to Oracle Primavera Cloud Resource Sync Integration

1. Go to the **Integrations** section of the project workspace.
2. Activate the integration.
 - a. Click **Actions** ■■■ next to the integration, then select **Activate**.
 - b. In the **Activate integration** panel, choose an appropriate tracing level, then click **Activate**.

A message confirms that the integration has been activated. Refresh the page to view the updated status of the integration.

3. Update integration properties.
 - a. Click **Actions** ■■■ next to the integration, then select **Update property values**.
 - b. In the **Update property values** panel, do the following:
 - i. Click to expand the **SaveDataWhenError** property, then in the **New value** field, enter either "Yes" or "No", depending on whether or not you want data to be saved to Oracle Primavera Cloud if there are errors on sync.

If no value is specified, the default value is used. The default value is "Yes".
 - ii. Click **Submit**.
4. Run the integration.
 - a. Click **Actions** ■■■ next to the integration, then select **Run**.
 - b. On the **Configure and run** page, do the following:
 - i. In the **WorkspaceCode** field, specify the Oracle Primavera Cloud workspace location.
 - ii. Click **Run**.

You've now successfully submitted the integration for execution.

Run the P6 to Oracle Primavera Cloud Role Sync Integration

1. Go to the **Integrations** section of the project workspace.
2. Activate the integration.
 - a. Click **Actions** ... next to the integration, then select **Activate**.
 - b. In the **Activate integration** panel, choose an appropriate tracing level, then click **Activate**.

A message confirms that the integration has been activated. Refresh the page to view the updated status of the integration.
3. Update integration properties.
 - a. Click **Actions** ... next to the integration, then select **Update property values**.
 - b. In the **Update property values** panel, do the following:
 - i. Click to expand the **SaveDataWhenError** property, then in the **New value** field, enter either "Yes" or "No", depending on whether or not you want data to be saved to Oracle Primavera Cloud if there are errors on sync.

If no value is specified, the default value is used. The default value is "Yes".
 - ii. Click **Submit**.
4. Run the integration.
 - a. Click **Actions** ... next to the integration, then select **Run**.
 - b. On the **Configure and run** page, do the following:
 - i. In the **WorkspaceCode** field, specify the Oracle Primavera Cloud workspace location.
 - ii. Click **Run**.

You've now successfully submitted the integration for execution.

Run the P6 to Oracle Primavera Cloud Resource Role Sync Integration

1. Go to the **Integrations** section of the project workspace.
2. Activate the integration.
 - a. Click **Actions** ... next to the integration, then select **Activate**.
 - b. In the **Activate integration** panel, choose an appropriate tracing level, then click **Activate**.

A message confirms that the integration has been activated. Refresh the page to view the updated status of the integration.
3. Update integration properties.
 - a. Click **Actions** ... next to the integration, then select **Update property values**.
 - b. In the **Update property values** panel, do the following:
 - i. Click to expand the **SaveDataWhenError** property, then in the **New value** field, enter either "Yes" or "No", depending on whether or not you want data to be saved to Oracle Primavera Cloud if there are errors on sync.

If no value is specified, the default value is used. The default value is "Yes".

ii. Click **Submit**.

4. Run the integration.

a. Click **Actions** next to the integration, then select **Run**.

b. On the **Configure and run** page, do the following:

i. In the **WorkspaceCode** field, specify the Oracle Primavera Cloud workspace location.

ii. Click **Run**.

You've now successfully submitted the integration for execution.

Run the P6 to Oracle Primavera Cloud Project Schedule Sync Integration

1. Go to the **Integrations** section of the project workspace.

2. Activate the integration.

a. Click **Actions** next to the integration, then select **Activate**.

b. In the **Activate integration** panel, choose an appropriate tracing level, then click **Activate**.

A message confirms that the integration has been activated. Refresh the page to view the updated status of the integration.

3. Update integration properties.

a. Click **Actions** next to the integration, then select **Update property values**.

b. In the **Update property values** panel, do the following:

i. Click to expand the **SaveDataWhenError** property, then in the **New value** field, enter either "Yes" or "No", depending on whether or not you want data to be saved to Oracle Primavera Cloud if there are errors on sync.

If no value is specified, the default value is used. The default value is "Yes".

ii. Click to expand the **IncludeUDFs** property, then in the **New value** field, enter the object names of the UDFs you want to include in the sync. They must be comma separated and inside quotation marks. Possible values are: None, Project, WBS, Activity, Assignment, Risk.

For example: "Project,Activity,Risk"

If no value is specified, the default value is used. The default value is "None".

iii. Click to expand the **IncludeCodes** property, then in the **New value** field, enter the object names of the codes you want to include in the sync. They must be comma separated and inside quotation marks. Possible values are: None, Project, Activity, Resource.

For example: "Project,Activity"

If no value is specified, the default value is used. The default value is "None".

iv. Click **Submit**.

4. Run the integration.

- a. Click **Actions** ■■■ next to the integration, then select **Run**.
- b. On the **Configure and run** page, do the following:
 - i. In the **WorkspaceCode** field, specify the Oracle Primavera Cloud workspace location.
 - ii. In the **ProjectCode** field, specify the Primavera P6 EPPM project filter.
 - iii. Click **Run**.

You've now successfully submitted the integration for execution.

Run the Oracle Primavera Cloud to P6 Project Schedule Sync Integration

1. Go to the **Integrations** section of the project workspace.
2. Activate the integration.
 - a. Click **Actions** ■■■ next to the integration, then select **Activate**.
 - b. In the **Activate integration** panel, choose an appropriate tracing level, then click **Activate**.

A message confirms that the integration has been activated. Refresh the page to view the updated status of the integration.
3. Update integration properties.
 - a. Click **Actions** ■■■ next to the integration, then select **Update property values**.
 - b. In the **Update property values** panel, do the following:
 - i. Click to expand the **SaveDataWhenError** property, then in the **New value** field, enter either "Yes" or "No", depending on whether or not you want data to be saved to Primavera P6 EPPM if there are errors on sync.

If no value is specified, the default value is used. The default value is "Yes".
 - ii. Click to expand the **EPSId** property, then in the **New value** field, enter the Primavera P6 EPPM EPS location (EPS ID).
 - iii. Click to expand the **IncludeUDFs** property, then in the **New value** field, enter the object names of the UDFs you want to include in the sync. They must be comma separated and inside quotation marks. Possible values are: None, Project, WBS, Activity, Assignment, Risk.

For example: "Project,Activity,Risk"

If no value is specified, the default value is used. The default value is "None".
 - iv. Click to expand the **IncludeCodes** property, then in the **New value** field, enter the object names of the codes you want to include in the sync. They must be comma separated and inside quotation marks. Possible values are: None, Project, Activity, Resource.

For example: "Project,Activity"

If no value is specified, the default value is used. The default value is "None".
 - v. Click **Submit**.
4. Run the integration.
 - a. Click **Actions** ■■■ next to the integration, then select **Run**.

- b. On the **Configure and run** page, do the following:
 - i. In the **ProjectCode** field, enter the Primavera P6 EPPM project filter.
 - ii. In the **WorkspaceCode** field, enter the Oracle Primavera Cloud workspace location.
 - iii. Click **Run**.

You've now successfully submitted the integration for execution.

Run the Oracle Primavera Cloud to P6 Project Task Sync Integration

1. Go to the **Integrations** section of the project workspace.
2. Activate the integration.
 - a. Click **Actions** ■■■ next to the integration, then select **Activate**.
 - b. In the **Activate integration** panel, choose an appropriate tracing level, then click **Activate**.

A message confirms that the integration has been activated. Refresh the page to view the updated status of the integration.
3. Update integration properties.
 - a. Click **Actions** ■■■ next to the integration, then select **Update property values**.
 - b. In the **Update property values** panel, do the following:
 - i. Click to expand the **SaveDataWhenError** property, then in the **New value** field, enter either "Yes" or "No", depending on whether or not you want data to be saved to Primavera P6 EPPM if there are errors on sync.

If no value is specified, the default value is used. The default value is "Yes".
 - ii. Click to expand the **EPSId** property, then in the **New value** field, enter the Primavera P6 EPPM EPS location (EPS ID).
 - iii. Click to expand the **IncludeUDFs** property, then in the **New value** field, enter the object names of the UDFs you want to include in the sync. They must be comma separated and inside quotation marks. Possible values are: None, Project, WBS, Activity, Assignment, Risk.

For example: "Project,Activity,Risk"

If no value is specified, the default value is used. The default value is "None".
 - iv. Click to expand the **IncludeCodes** property, then in the **New value** field, enter the object names of the codes you want to include in the sync. They must be comma separated and inside quotation marks. Possible values are: None, Project, Activity, Resource.

For example: "Project,Activity"

If no value is specified, the default value is used. The default value is "None".
 - v. Click **Submit**.
4. Run the integration.
 - a. Click **Actions** ■■■ next to the integration, then select **Run**.
 - b. On the **Configure and run** page, do the following:

- i. In the **ProjectCode** field, enter the Primavera P6 EPPM project filter.
- ii. In the **WorkspaceCode** field, enter the Oracle Primavera Cloud workspace location.
- iii. Click **Run**.

You've now successfully submitted the integration for execution.

Run the P6 to Oracle Primavera Cloud Project Risk Sync Integration

1. Go to the **Integrations** section of the project workspace.
2. Activate the integration.
 - a. Click **Actions** ■■■ next to the integration, then select **Activate**.
 - b. In the **Activate integration** panel, choose an appropriate tracing level, then click **Activate**.

A message confirms that the integration has been activated. Refresh the page to view the updated status of the integration.
3. Update integration properties.
 - a. Click **Actions** ■■■ next to the integration, then select **Update property values**.
 - b. In the **Update property values** panel, do the following:
 - i. Click to expand the **SaveDataWhenError** property, then in the **New value** field, enter either "Yes" or "No", depending on whether or not you want data to be saved to Oracle Primavera Cloud if there are errors on sync.

If no value is specified, the default value is used. The default value is "Yes".
 - ii. Click to expand the **IncludeUDFs** property, then in the **New value** field, enter the object names of the UDFs you want to include in the sync. They must be comma separated and inside quotation marks. Possible values are: None, Project, WBS, Activity, Assignment, Risk.

For example: "Project,Activity,Risk"

If no value is specified, the default value is used. The default value is "None".
 - iii. Click to expand the **IncludeCodes** property, then in the **New value** field, enter the object names of the codes you want to include in the sync. They must be comma separated and inside quotation marks. Possible values are: None, Project, Activity, Resource.

For example: "Project,Activity"

If no value is specified, the default value is used. The default value is "None".
 - iv. Click **Submit**.
4. Run the integration.
 - a. Click **Actions** ■■■ next to the integration, then select **Run**.
 - b. On the **Configure and run** page, do the following:
 - i. In the **WorkspaceCode** field, specify the Oracle Primavera Cloud workspace location.
 - ii. In the **ProjectCode** field, specify the Primavera P6 EPPM project filter.

iii. Click **Run**.

You've now successfully submitted the integration for execution.

Monitor the Integrations

To monitor the running of each integration flow:

1. In the project workspace, click **Observe**. You'll see the integration flow being triggered and running successfully.
2. To manage errors in your project, see [Manage Errors in a Project](#).