Manage global portfolio and project data faster and easier with the power of P6 and the ease of use of Excel.
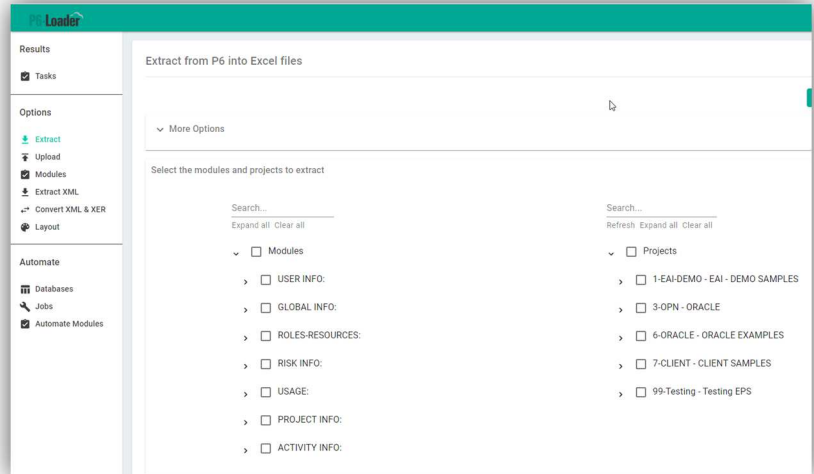
P6-Loader

P6-Loader v13 – Easily Extract, Edit and Upload P6 Data with Excel

THE CHALLENGE

When setting up a new project in P6, project teams have to build up extensive project data from tasks to coding structures. In many cases, this data already exists in other applications including ERPs, EAMs, estimating, accounting, other schedules, and, of course, Excel spreadsheets. Furthermore, as projects progress, the data management extends to updating from multiple sources, to ensuring scope changes are captured while maintaining baselines and reporting. All this data gathering and management requires a lot of effort by the P6 team.

The P6 administrators and Super Users also have their hands full keeping program and portfolio data up-to-date and clean for corporate reporting and benchmarking. They have a lot of data entry and ongoing maintenance with user administration and global data for

standardized KPI reporting and adherence. They typically secure the P6 system so tightly that they end up assisting project teams with maintaining activity codes, calendars, and user defined fields as well. Making mass data changes, ensuring data consistency, administering multi-user, multi-database environments or single large project environments is very difficult when trying to keep data synchronized and layouts, reports and dashboards working smoothly.

THE SOLUTION

Emerald's P6-Loader® is an easy to use, Excel based tool that goes far beyond P6's built-in Excel and XER/XML import functionality. By using Primavera APIs (on-premise) and WebServices (cloud), it keeps your data safe and removes the need to work with the unsupported SDK, error prone data parsing utilities and database level tools.

P6-Loader extracts and uploads over 99% of P6 data and can automate P6 functions such as scheduling, leveling and summarizing. The team can use P6-Loader for schedule development in

Emerald
A S S O C I A T E S

CONTACT US
hq 403.686.7100
toll free 1.877.316.6005
emerald@emerald-associates.com
www.emerald-associates.com

■ P6-Loader® is a registered trademark of Emerald Associates

Excel with estimating information and macros as well as for integrations from corporate or project systems in a very cost effective and quick to deploy manner. The tool can even enable disaster recovery by creating backups of an entire database including global data (baselines, global dictionaries, assignments, etc.).

THE BENEFITS

Emerald's P6-Loader accelerates P6 implementations, consolidations, integrations and even migrations to a hosted cloud or Oracle SaaS. It speeds up project creation and automates schedule development and updating. P6 administrators' jobs are much easier even across multiple databases. The team can develop resource and cost loaded schedules in a fraction of the time and cost by taking advantage of Excel templates that non-P6 users can work with. With estimate information often in Excel, macros can be built to load P6 up in a very quick and repeatable manner. With one client, we built a 4000 activity resource loaded schedule in two days. Teams can template and load P6 data more consistently making updating much faster, collaboration a reality, and consistency easy to achieve.

EASY, FLEXIBLE & SECURE

- Web-based, easy to learn and use
- On-premise, cloud or SaaS enabled
- P6 API/WebServices honors P6 security
- Prevents database corruptions from XER manipulation and unsupported SDKs

SAVES TIME

- Create, modify or delete P6 data dictionaries, EPS, OBS, Resources/Roles Activity Codes, Project Codes, Calendars, UDFs, Cost Accounts, etc.
- Streamline project creation for WBS, activities, logic, steps, expenses, resource assignments, notebooks and bucket planning
- Manage baseline data with ease

SAVES MONEY

- Load information into P6 without middleware or expensive tools
- Deploy P6 databases in minutes
- Cleanup & restore P6 info in minutes
- Consolidate P6 databases in hours

USER COMMENTS

"I can't imagine how much longer our P6 implementation would have taken without the P6-Loader."
Sonja, Marathon Petroleum

WHAT'S NEW – V13

- Easier to work with hierarchical fields - WBS, Resources, Roles, Codes, EPS, OBS, and Cost Accounts.
- Full path extracting and loading for all hierarchical codes makes working with these hierarchies easier in Excel. Several new fields were added including the full code path field and a field showing the level of the hierarchy. This makes building hierarchies in Excel easier and loading them into P6 less error prone.
- Allows importing of WBS with their codes (without needing the path) if they are unique across a project.
- WBS template fragnet loader - You can take advantage of WBS templates built in P6 within P6-Loader to copy WBS nodes, activities, resources assignments, logic, steps, and expenses from one or many templates and fill in any placeholders for activity ID and names as you generate new WBSs into your project. You can also assign UDFs and codes to WBS, activities and resource assignments while applying a template.
- Improving the handling of spread information to allow quarterly and yearly spread extractions are back. Manual spread loading of these spread periods is not supported.

Emerald also offers add-ons and loader solutions for Unifier, Prime, Aconex and Primavera Contract Management.

TECHNICAL SPECS (ON-PREMISE)

- Windows or Linux OS, released in the past 10 years
- 1 GB memory minimum, 4 GB recommended, 8 GB ideal
- 250 MB disk for installation, 5 GB temporary disk area
- The P6-Loader works with any modern desktop browser such as Edge, Chrome Brave or Safari

CERTIFICATIONS