

Using Primavera and SureTrak

Preparation

Primavera and SureTrak use Btrieve databases to store your project information. Mapped into the operating system, each project generates a set of 19 datafiles. To access this information, Project Gateway makes use of a Windows mechanism called ODBC (open database connectivity). This is the same mechanism used by Primavera's ReportSmith subsystem to access the project information.

Unfortunately the ODBC mechanism is difficult to set up correctly and first time users often encounter errors when importing projects for the first time. The following procedure should be followed carefully to correctly set up the system.

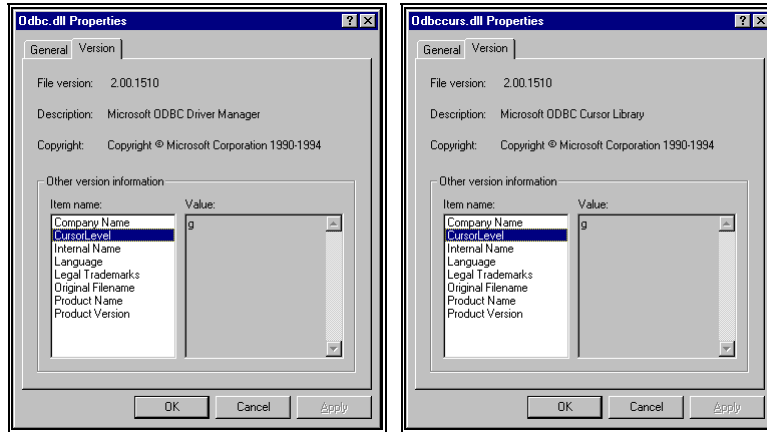
Configuring P3 & ODBC for Project Gateway

These instructions assume that you are familiar with the operating system and can do functions such as Find a file by searching a drive and modifying INI files. If not, please get a system administrator to assist you.

Preparing the ODBC System

1. Find the Files named ODBC*.DLL.
2. In the list of files located, you will see two critical files that are necessary for operation. ODBC.DLL and ODBCCURS.DLL.

Put the cursor on the file name ODBC.DLL. Press the Right mouse button (Windows 95,98 & NT) and select the command "Properties." A dialog box is displayed. Select the "Version" tab. At the bottom will be displayed a list including the words "Cursor Level." Click on the "Cursor Level" item. At the right will be displayed a letter. This letter is usually g or h. It may be blank. Write down this letter. Now repeat the procedure on ODBCCURS.DLL. If you have difficulty importing Primavera projects, the most likely source of problems is the system DLL's named ODBC.DLL and ODBCCURS.DLL. Although these are separate files, they operate as pair. If the versions of these system DLL's are incompatible, Project Gateway import will fail even though all the P3 data is correctly stored, and all the Project Gateway software is installed and configured correctly.



THESE TWO LETTERS MUST BE THE SAME. i.e., g and g, h and h, blank and blank etc. If they are different STOP. You cannot use Project Gateway until a new set of these ODBC drivers is installed on your system. Contact your system administrator.

3. Find the file ODBCADM.EXE. Double click to run it. It is the 16 bit ODBC administrator control panel. Here you should find a data source already defined for P3 Btrieve Data. If not, create a new one using the Btrieve driver. In the Datasource setup panel you must set the directory to the directory where your P3 Projects are stored. **"USE CURRENT DIRECTORY" MUST NOT BE CHECKED.**

IF IT IS CHECKED, REMOVE THE CHECKMARK AND USE THE BROWSE BUTTON TO SELECT THE PROJECT FILES DIRECTORY.

USE DATA DIRECTORIES WITH SHORT FILE NAMES ONLY

The file path to the Primavera data must be an 8.3 compatible file name. That is, none of the subdirectory names can include spaces or more than 8 characters. This requirement is normally met if you install P3 locally (C:/P3WIN/PROJECTS). However, using Windows 95 or NT that support long file names, you might have put your data in C:/My Documents/Projects or some similar place. Data in these directories cannot be accessed by Project Gateway. Create a new data directory using only short directory/subdirectory names, store the projects in this directory, use the Tools, Update Data Directory command on the projects, create a new ODBC data source for this directory. When all this is done, you should be able to interact with Project Gateway. Note: do not try to change directory names by renaming them, create new directories instead.

Save the modified Data source definition. Exit the ODBCADM.EXE application.

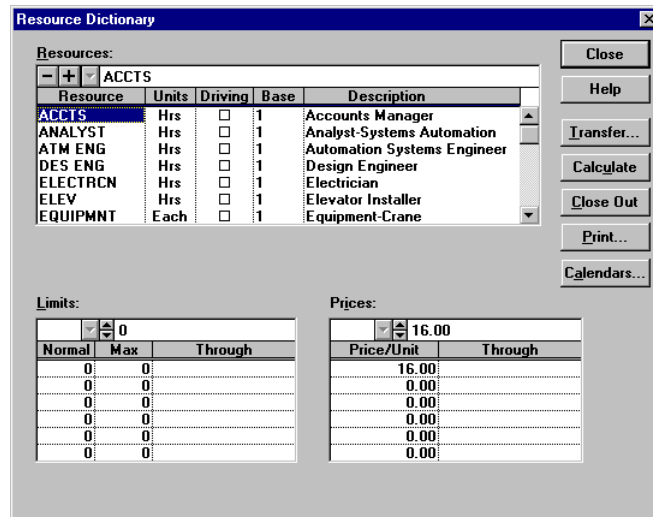
Preparing the P3 Project Plan

4. Open P3.
5. Load your project plan that you want to publish.

6. Use the command "Data - Activity Codes".

Look at the activity code titles. If any of these titles are less than 4 characters long, change them to be at least 4 characters. For example, if you see a code called GRP change it to GRPS. When you close the dialog, enter Yes to "Save Structure Edits". Note- what you are changing is not the length of the code, but the length of the name of the code. This does not limit your use of the 64 character activity code structure.

7. Use the command "Data - Resources"



Notice the Units used for your resources. Write down the units used for labor resources. You will need this information in a later step.

8. USE THE COMMAND "TOOLS, UPDATE DATA DICTIONARY". IN THE DIALOG BOX, SELECT "ADVANCED". PRESS OK.

You must do the Update Data Dictionary function for each project that you will want to access with Project Gateway. In P3 Version 1, this will be located on the Reports/ReportSmith menu. In Version 1 it is on the Tools Menu., in SureTrak, it is part of the Save dialog. *Note: To see this dialog in SureTrak V1, you must set NODDF=0 in the [DDFOptions] section of the STWIN.INI file.*

9. Close and exit P3.

Preparing the MarinPMG.INI File

10. Find the file "MarinPMG.INI"

Open this file in the NotePad editor. Scroll down until you find the section that begins with the line [Primavera].

[Primavera]

LaborUnits=HRS,MH

IF YOU ARE USING P3 VERSION 2 , ENTER THE FOLLOWING LINE:

version=2

so that the file reads

[Primavera]

version=2

IF YOU ARE USING P3 VERSION 3 OR LATER, ENTER THE FOLLOWING LINE:

version=316

so that the file reads

[Primavera]

version=316

LaborUnits=HRS,MH

If you have any labor resources that use units other than those shown above, add them to this time. For example, if you use the unit "mhrs", modify the list to say.

LaborUnits=HRS,MH,mhrs

If you use the unit "Hrs." then add this to the list

LaborUnits=HRS,MH,mhrs,Hrs.

This is important. Resources using units not found in this list will not be published in the repository.

11. Close Notepad and save the updated MarinPMG.INI file.

Resource Names

Before you publish anything, you should make a decision concerning the way in which Resources in P3 become Participants in your repository.

P3 uses a short unique code for each resource, it also allows you to create a description for the resource that can be much longer.

By default, the P3 resource ID will be used as the Participant name. If you want to use the Resource Description as the resource name do the following.

1. Make absolutely sure that your Resource Descriptions are unique. P3 will allow you to have duplicate descriptions, but Project Gateway requires all participants to have unique names. In addition, make sure that none of your Resource ID are the same as any of your Resource Descriptions. This is easy to ensure by simply making all the Resource Descriptions at least 12 characters long.

2. Make sure that all your plans use the same Resource ID and Resource Description for the same person. This assumes that you will put these plans into the same repository.

Add the following option to your MarinPMG.INI file in the existing [current] section.

AutomaticResourceRenaming=1

This will tell Project Gateway to publish the resource descriptions as the Participant Names. It will still use the Resource ID's for synchronization.

Publishing a P3 Project

1. Once all the setup steps are completed, go to the Notes Actions menu and select the Create Project In Notes Database Command.
2. Choose New or Existing as appropriate.
3. At the Create or Add dialog box, use the browse button.
4. At the bottom of the Open File dialog box, set the dropdown to the file type "Primavera".
5. Locate the directory when the P3 projects are stored. This MUST be the same directory you set in the Setup ODBC Data Source procedure done above.
6. Select the project from the list of files. The file names displayed will be of the form????ACT.P3. Press Open to clear the dialog box.

In the Create or Synchronize dialogs, a Primavera project is selected by selecting the ?????ACT.P3 file. For example, for the project APEX the file to select is APEXACT.P3.

7. Set other options as necessary and Press OK.
8. At this point the "Select Data Source" dialog box will appear. Point to the data source you setup earlier and press OK.
9. If no errors occur, the system will read your project files and display the "Primavera Options" dialog. If errors occur, go to the section entitled "Errors when importing P3 Projects" later in this chapter.

Primavera Options Dialog

During project loading, the importer will display the Primavera Options Dialog to allow you to configure the Notes database.

Notes Database Outline View Settings

Unlike the other project systems supported by Project Gateway, Primavera does not have a natural outline structure. Instead, its data can be sorted and summarized by several independent coding systems.

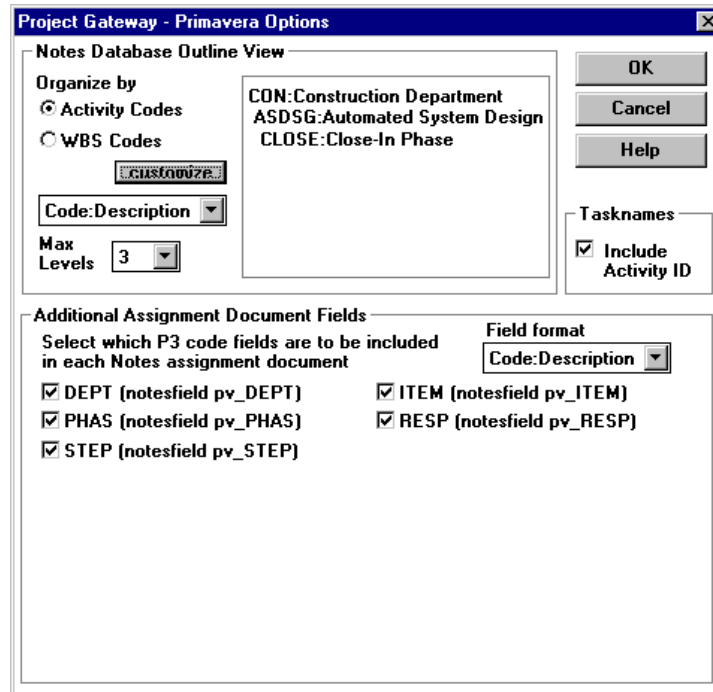
This part of the dialog lets you select whether the Notes Outline View will be driven from Activity codes or WBS codes, Activity ID codes cannot be subdivided for the outline, but are available within Notes for additional categorization

This dialog lets you select the maximum depth of the outline and the format of the outline headings. There are three forms, *Code Only*, *Description Only*, and *Code:Description* that is the default selection.

The panel on the right shows a sample task outline derived from the project being imported. Thus, it will not look like the example shown.

The outline format selected here will be visible in your Notes database using the View\Outline command.

If Activity Codes are selected, the "customize" button will appear. Pressing this button displays another dialog that allows you to choose the order of the codes used to create the outline.



Note: Most of the content of this dialog is derived from the activity codes used in the project. If the project's tasks are not coded, most of the form will be blank.

Tasknames Setting

Tasknames can be imported alone, or with the Activity ID code prefixed to the name. For example, if the task is "Prepare Flooring" and the Activity ID is AC102 then, depending upon the setting of the checkbox, Project Gateway assignment documents will display either Prepare Flooring or AC103:Prepare Flooring.

Note: Whichever you select, make sure you do not change the setting during subsequent synchronizations.

Additional Assignment Document Fields Settings

Project Gateway will create Notes data fields in each assignment document for the values of codes associated with the task. The full list of task code fields for this project (up to 20 items) is shown; you may select those you want to import. The primary reason for importing these fields is to allow you to create Notes Views by sorting and selecting using these codes. The format option allows you to import just the code value, just the code description, or a merged field of the form

“Code:Description”. The only disadvantage of importing every code is the extra space used in the Notes database.

The new fields selected here will be created using the field names shown in the dialog box. E.g., the RESP field would be named pv_RESP in the Notes database. These new fields will be placed in every assignment document. After the Notes Database is generated, select one of the assignment documents and use the Document Properties (Notes 4) to show the fields in the document. You will see the pv_ fields in the list. To show them on the assignment form, use the Design Form command to add the fields to the Assignment Form.

Note: When you have selected the settings on this dialog, press OK to continue building the Notes database. If you cancel here, the database construction or synchronization will stop.

Synchronize Update Notes

When you use the Update Notes command, the system first loads the Notes database and then loads the Primavera database. It matches assignments between the two plans, then it updates the Notes database with the new information.

NOTE: IF YOU USE ANY ACTIVITY OR RESOURCE CUSTOM CODES YOU MUST DO TOOLS UPDATE DATA DICTIONARY ADVANCED BEFORE SYNCHRONIZE UPDATE NOTES.

During the loading of the Primavera project, the Options dialog is displayed so you may change the format of the outline or the use of activity codes. If you are Synchronizing from the same workstation used when you created the Notes database, the options values will be preset to their previous values, otherwise you will have to reselect them manually. Press OK to continue the synchronization process.

New tasks and assignments that you have added to the Primavera plan since the Notes database was created will be added to the Notes database automatically. Tasks that you have deleted from Primavera will not be deleted in the Notes database, but the Notes documents will display a message when opened.

The Primavera matching process uses the ActID codes to correlate tasks. The assignments on the task are matched first by resource name and secondly by account number. The WBS codes are never used for matching. If an assignment has been manually added in Notes, and an assignment with the same task and resource name has been added in Primavera, the assignments will be matched. But it is easier to use Update Project to move the new tasks from Notes to Primavera than to enter them manually in both systems.

Synchronize Update Project

When you use the Update Project command, the system first loads the Notes database then loads the Primavera database. It matches tasks and assignments then edits the Primavera database to record the progress reported in Notes. Tasks are matched by ActID and assignments are

matched by ResID and account code. Only a limited number of fields are updated on existing tasks in the Primavera database. These include the task fields *Actual Start*, *Actual Finish*, and *Percent Complete*, and the resource assignment fields *Actual to date*, *To Completion*, *At Completion*, and *Percent complete*.

Adding New Tasks from Notes to Primavera

When the user selects the “**Add New Tasks to Project**” option on the Update Project Dialog, Project Gateway will extend the Primavera project by adding new resources, tasks and assignments to the project database.

These new items will be those created by using the “Compose A New Assignment” function in the Notes database.

For new tasks, Project Gateway will create ActID codes starting with the letter NT in the form NT001, NT002, etc. The planned start date in Notes will be preset as the Early Start and a start constraint will be placed on the task. The approximate number of work days between the planned finish and planned start in Notes will be set at the Original and Remaining duration. When Primavera recalculates, it will replace the starting and ending dates.

For new assignments, each assignment is made with an unspecified account code.

For new resources (which will be created only if used on one of the new assignments), Project Gateway will use the first 8 characters of the Notes resource name as the ResID code. Thus, you should limit the name of Notes resources to avoid possible conflict.

Because the assignments being discussed in this section were created in Notes, the Notes database does not have a record of the ActID that is assigned. When you go to Update Notes the next time, it will not be able to match the code (Ntxxx) that exists in the Primavera database with the existing assignment in the Notes database and will resort to matching by task description only. You must not change the task description in Primavera before doing Update Notes for these newly created tasks.

However, if you want to change the ActID that Project Gateway has assigned, you must do this before doing Update Notes.

Once you have done Update Notes, the new ActID will be stored in the Notes database and you can change the task description in Primavera as you wish.

Two Way Planning

If the planned start is changed, the date entered will be set as the new start date and a start constraint will be placed on the task.

If the planned finish is changed, and the .INI file option [Primavera] *useRemainingDuration* is not set or is =0, then the duration of the task will be adjusted to create the user entered finish date. If the .INI file option *useRemainingDuration* is in effect, the finish change, if any, is

ignored and the remaining duration specified by the user in the assignment document is used instead.

Updating Costs

When labor hours are updated during Update Project, the corresponding cost values are not changed by Project Gateway. An option is available to cause Project Gateway to adjust the CostAtCompletion for a resource based upon the change in QuantityAtCompletion.

[Primavera]

recalcCostsDuringUpdate=1

if this is set the following occurs

Compute $rate = \text{BudgetCost} / \text{BudgetQty}$ (if both are >0, otherwise rate=0)

$\text{CostToDate} = rate * \text{QtyToDate}$

$\text{CostAtCompletion} = rate * \text{QtyAtCompletion}$

Making a New Primavera Project

Project Gateway does not support the Make Project File function in Primavera format. It is possible, however to achieve much the same result by creating a new, blank, Primavera project and then doing a synchronize update project command with the Add New Tasks option enabled. Any project in the database can be exported to Primavera in this way, including those created as Repository Schedules or with other planning systems.

Limitations: This process will create Tasks, Assignments and Resources, but will not create dependencies. All Tasks will have start date constraints. Dictionary entries are not created.

1. Use the Primavera File New Command to create a new database. Without adding any tasks, select the "Reports / Reportsmith / UpdateDataDictionary" (include advanced options) command. OK the subsequent dialog. Then Select "File Exit." At this point you have an empty Primavera Project Database. If using SureTrak, create a new project then save as a .P3 project. The Update Data Dictionary dialog should appear as part of the save.
2. Use the Synchronize Update Project command. Select the Notes Database and the empty Primavera Project created above. Make sure that the "Add New Tasks..." option is checked and press OK.
3. A dialog will appear stating that No tasks have been matched. OK this dialog. A second dialog will appear asking if you want to proceed and add new tasks. Press Yes.

Project Gateway will determine that none of the tasks in the Notes database project are present in the Primavera database. It will then proceed to add each Notes assignment into the PV database, creating Task and Resource entries as required. If the assignment document taskname contains a leading "code:" that code value will be used as the

Primavera task code unless it duplicates another task in which case a new code will be assigned.

Note: After doing Update Project, you may change your activity IDs as desired (but do not change any of the descriptions) and do Synchronize Update Notes. This will record the Primavera Activity ID's in the Notes database in preparation for future synchronizations.

Using Custom Primavera Data Fields

Activity Custom Codes

If you wish to import additional data from Primavera, you may use the custom activity fields feature of Primavera. The only fields Project Gateway will use will be those named "Aux1", "Aux2"... "Aux9". These must be text fields. Define the fields desired and add values for some or all of your project tasks. Remember to update the data dictionary after making your changes.

A field of this type is incorporated into assignment documents using the "Fields" option on the Advanced Options Dialog when creating the Notes database.

In the "Create Database - Custom Field Selection" dialog, find the entry for "Task AUX1/TEXT1." Double click and enter a Notes field name. Repeat for each field you want to import. OK the Custom Field dialog, OK the Advanced Options dialog, and OK the Create dialog.

The contents of each Aux field will be moved from the tasks to each assignment document for that task.

Note: You will also need to modify the Assignment form to display the Notes field that you have created.

Aux fields should be used for Taskhelp. In this case you only need to define the field and set the values in Primavera. Then select "Task AUX1/TEXT1" in the Create Taskhelp dialog.

Resource Custom Codes

Project Gateway imports the RIT custom fields associated with resource assignments into the associated Notes Assignment document. The first 9 RIT fields defined will be imported, any additional RIT fields will be ignored.

The resource custom field title will be used to construct the Notes Field name used for the data. Example: If you define a custom field called "WorkSite", Project Gateway will create a corresponding Notes Field called pv_WorkSite. Note: The title is the description if one is provided, otherwise it is the field code.

The type of the field in Notes is a function of the Primavera field type and the Field Title. If the Primavera field is of the type C (character) then the Notes field will be a Text field. All other fields will become numeric fields except as specified below:

If the Name of the field ends in the characters "Date" and the Primavera field is not a character field, the Notes field will be created as a date type

field. The suffix used to recognize which fields are to be treated as date fields is redefinable by making an entry into the [Primavera] section of the MarinPMG.INI file as follows:

RITDateIndicator=date

The spelling is not case sensitive.

If the title of the field is one of the following, then special processing is done.

"PlanStartDate"	The value becomes the scheduled start date in the assignment document.
"PlanFinishDate"	The value becomes the scheduled end date in the assignment document.
"ActualStartDate"	The value becomes the actual start date in the assignment document.
"ActualFinishDate"	The value becomes the actual finish date in the assignment document.
"ActualPercent"	The value becomes the percent complete (1-100) in the assignment document.

Note: For both activity and resource custom codes, Primavera allows you to specify a code name and a descriptive title. If no descriptive title is supplied, the code name becomes the field name in Project Gateway, otherwise, the descriptive title is used. This means that, for activity codes, if you enter a descriptive title, it must be AUX1..AUX9.

Multiple Resource Assignments

Project Gateway treats the ResourceDesignator (i.e. the "Curve" field in the Resource Form) so that multiple assignments can be made to the same resource and account on a single task. It does this by treating the single character as a prefix onto the account code, thus making the account code unique for each instance of the resource assignment.

The Notes field created to hold the account code (if specified in the Field Map) will show the value "x:account" where x is the character shown in the curve field and account is the usual 11 character account code. If the curve field is blank, the "x:" will not appear. To create a view based upon account codes, you should examine the account code value in the view column formula, and remove the first two characters if the second character is a colon.

Note that the account code field *does not* have to be included in the Field Map for the assignments to be published and synchronized correctly. You only need to include it in the Field Map if you want to use it in a Notes form or view.

Using Remaining Duration

Project Gateway allows you to report progress two ways.

1. By reporting percent complete
2. By reporting remaining duration

As supplied, the system is configured for percent complete reporting. When a task is updated during synchronization, the remaining duration of the task will be calculated as the remaining percent complete times the original duration.

By following the steps in this section, you can modify the database design and configuration settings to allow users to set remaining duration directly. Note that Project Gateway publishes only assignment documents and Primavera supports remaining duration as a task property. If there are several assignments to a task, the task remaining duration will be set to the longest remaining duration of any of the assignments. **Note:** If all assignments of the task are complete, the remaining duration will be set to zero.

The task remaining duration can be imported to Notes, modified in Notes, and then updated to the Primavera plan. When a Primavera plan is imported, each assignment document will have the field *pg_remdur* set to the numeric Primavera remaining duration value for that task.

Remaining Duration INI Settings

In order to use this capability you must make the following setting in the MARINPMG.INI file.

[UpdateNotes]

AllowRemainingDurationUpdate=1

if=0, the remaining duration field in the assignment document (*pg_pmRemDur*) will be always updated during synchronization with the current value in the project plan except for assignments that have actual start dates. These assignments will retain the value last entered by the user. This the default setting.

if =1, the remaining duration field in the assignment document (*pg_pmRemDur*) will be always updated during synchronization with the current value in the project plan overriding any previous user entries. This allows new plan durations to appear in the Notes documents.

[Primavera]

useRemainingDuration=1

if=0, the remaining duration will be calculated from the original duration and the percent complete.

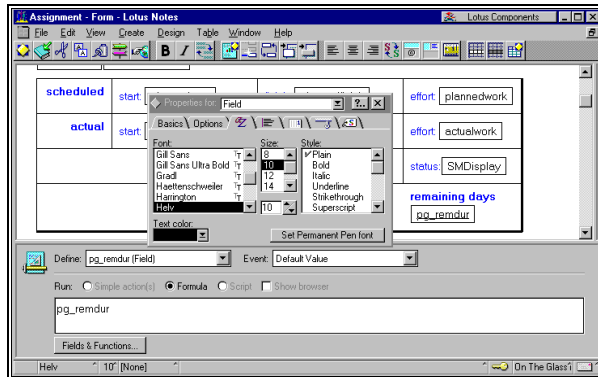
if=1, the remaining duration will be set to the highest value found in the Notes assignment documents created for that task. If there is only one assignment on the task, the Notes value will directly set the

Primavera task value. If there are several assignments, the one with the longest remaining duration will be used.

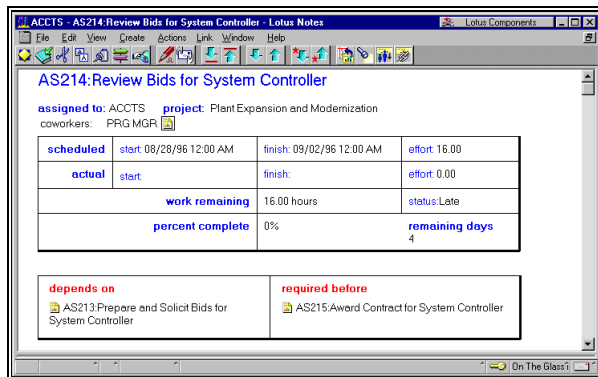
Showing Remaining Duration in the Notes Database

The following instructions were written for Notes 4.6, the process in later versions is similar, but requires the Notes Designer client.

To do the following steps, you must have designer access to your project database. After making these settings and importing a project, you must modify the design of the *Assignment form* to show an additional field that will be used to display and enter the remaining duration. This new field should be called `pg_remdur`, and should be an editable number field, and the default value should be `pg_remdur`. The best place to insert this field is next to the percent complete field in the status grid.



Then the assignment form will contain this new field that will appear with the heading "remaining days." This will be an editable field that will be preset by import to show the value supplied from Primavera, but which can be changed by the user to report status.



Creating a Notes View using Activity Codes

One of the most important features of Primavera is its ability create many specialized codes for tasks. You can use these code fields within Notes to create many custom views. You can also use them as search criteria.

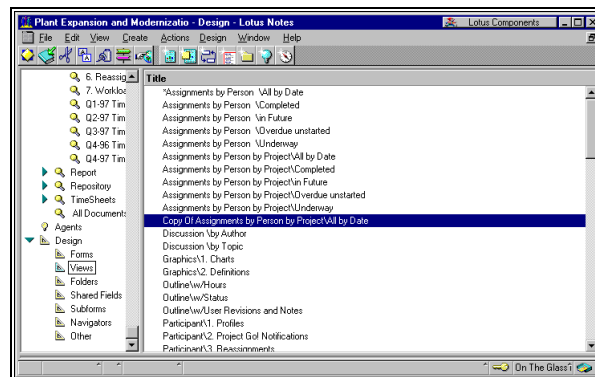
Each activity code is imported into the Notes assignment documents with the field name pv_CODE whose value will be the code value for the task from which the assignment is associated. In the example that follows, we have imported the Primavera sample project APEX that contains RESP as one of its activity codes. By examining one of the assignment documents with the Document properties, Fields browser, you can see the field pv_RESP that contains the code value for that document.

To construct a view using this RESP code do the following:

Goto Design, Views.

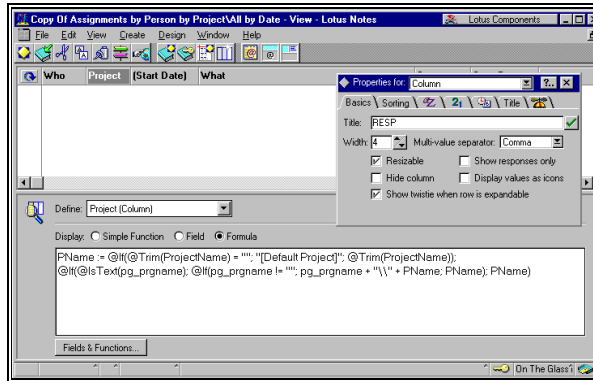
Select the Assignments by Person by Project view.

Edit Copy, Edit Paste. This will create a view named "Copy of Assignments by Person by Project" in the View list.

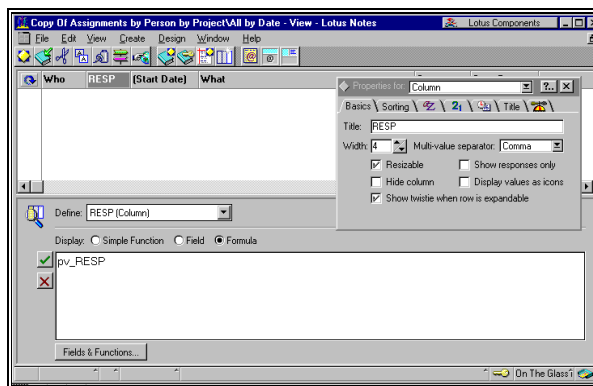


Double click on the view name to edit the view definition.

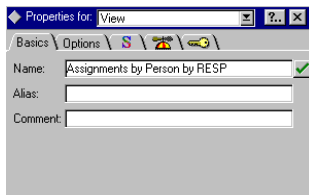
Double click on the column labeled "Project". This will display the column properties. Change the column name to the name of the code field you are going to use e.g., RESP.



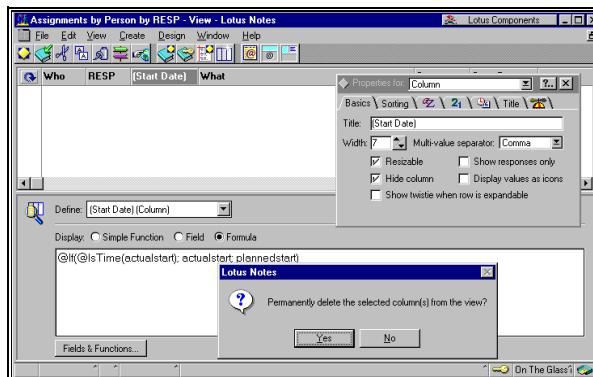
Now clear the formula in the lower pane. Highlight the text then press DEL to clear it. Enter pv_RESP in this pane. No punctuation is used.



In the properties box, change to the View setting and modify the view name to Assignments by Person by RESP.

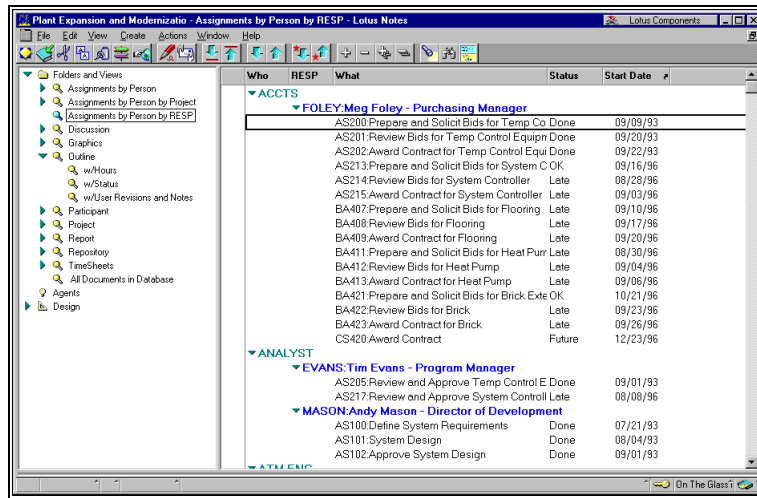


Click on the start date column and press delete and confirm the deletion.



Use File Close to save your new view design. This will return you to the design views screen.

Move up the folder pane and select your new view.



Using P3 Projects from Multiple Directories

If you have projects in several directories, you will need to have several data sources set up, each pointing to a particular data directory.

However, Project Gateway normally memorizes the data source name so you will not have to reenter it once you have done your first successful project import.

If you have several data sources, set one of the following options in the [Primavera] section of the MARINPMG.INI file

AskForDataSource=1

This will cause PG to prompt you for the Data Source each time you import or synchronize.

AskForDataSource=2.

If this is set, the system will only ask for the datasource for a project that has not previously been imported. Once imported, the datasource used will be associated with the project name and reused automatically.

Note: To clear these associations, remove them from the [Primavera] section of the MARINPMG.INI file where they are written in the form:

"DSA:"<projectfilename>=<datasourcename>

To restore the default behavior, set AskDataSource=0

Synchronizing when ActivityID codes must be changed

The following procedure is very specialized for the following situation

1. A project "X1" as been published and work is underway in the repository. The project is correctly synchronizing between P3 and Notes.

2. You need to add a prefix to the existing activity codes.

Since the project is already published, it will not synchronize correctly because the activity ID stored in the repository no longer match those found in the P3 database. This procedure will allow you override the usual matching logic to complete a full synchronization cycle using the new codes. After this, normal synchronization can resume.

Example:

Assume the project was published with an activity with
ActivityID=200

Assume the this task in the new project plan uses
ActivityID=ASB200

1. Set the INI options as shown below. *Note: These entries are put in the [current] section of the INI file, not the [Primavera] section.*

[current]

MatchUsingModifiedID=1

PrefixForStoredID=ASB

2. Synchronize Update Project

Using the setting above, the ActivityID retrieved from the repository plan would be modified to be ASB200 ="ASB+200". This code will be successfully matched to the task in the P3 plan.

3. Verify that this works successfully by carefully examining the Sync.Txt report and the project file.

4. Synchronize Update Notes.

This will first match using the special prefix, then store the new project model containing the new ActivityID found in the project plan. After this is done, the project in the repository will contain the Activity codes in the P3 plan.

5. Delete the MatchUsingModifiedID and PrefixForStoredID from the MarinPMG.INI file so that the code transformation is no longer applied. Otherwise all other P3 synchronizations will fail.

This technique must be used for one project at a time since the prefix is in the local INI file. It only supports this one special case adding a prefix to the stored code during matching, no other transformations.

The Sync.Txt file will annotate each match were this prefix was applied.

Be aware: The system first matches using the stored code (200) if this fails, it tries the prefixed code (ASB200) so it is important that all the

tasks in the new plan have the prefix so that none of them match the original codes.

Errors while Importing P3 Projects

ODBC and Phase Errors

Errors generally take the form of a message "ODBC Error" and usually present a message box saying "phase=2" or some other number.

Phase=2 error:

Cause 1 - you are using a Primavera Version 2 project, but have not correctly updated the MarinPMG.INI file as described in the section above. If you see an error message identified as "phase=2", and the next dialog reports that the field "AutoCostRules" is missing, then you are reading a Primavera Version 2 file without having set the version=2 parameter as described above

Remedy - add version=2 to the MarinPMG.INI file, [Primavera] section.

Cause 2 - You have not done the "Update Data Dictionary" command on this project.

Remedy - Open P3, Load the project. Do "Tools - Update Data Dictionary - Advanced." Close P3.

Cause 3 - Using a datasource that has "Use Current Directory" checked.

Remedy - Run ODBCADM.EXE and change the data source definition to use a fixed directory.

Cause 4 - Incompatible ODBC drivers.

Remedy - Check the drivers as described above.

Phase=6 error:

Cause - One or more Activity Codes has a title shorter than 4 characters.

Remedy - See the instructions above to change this. Do Update Data Dictionary after the change. Then try importing again.

Phase=12 error:

(sometimes preceded by an "Assert" dialog box)

Remedy - You need to add an additional line to your MarinPMG.INI file that says "SkipWBS=1" so that the file appears as follows.

```
[Primavera]
version=2
LaborUnits=HRS,MH
SkipWBS=1
```

Close and save the MarinPMG.INI file, then try importing again.

Select Directory Prompt Appears

If, after selecting the data source, you get the dialog box "Select Directory", the WIN.INI file is not properly configured and no projects can be imported by Project Gateway. Specifically, in the [Btrieve] section, the options= parameter should contain the /T: options setting to identify the btrieve.trn file location. This option should have been set up when the Btrieve drivers were installed. Find the btrieve.trn file on your computer and setup the option with the file name. If you don't have a btrieve.trn file, then reinstall the ODBC drivers components of Primavera.

Example of correct options:

```
[Btrieve]
```

```
options=M:64 /P:4096 /B:16 /F:20 /L:40 /N:12 /T:C:\P3WIN\P3OUT\BTRIEVE.TRN
```

General

Please check the readgate.wri file for the most recent information.

Common Project Fields - Primavera/SureTrak

Note: Fields derived from the Activity Code Structure are imported automatically as described in Appendix B, they are not considered part of the common project format

C - Create Notes Database/Update Notes

SP - Synchronize, Update Project

	Common Project Format Data Name	Notes Field Format	C	SP	Primavera Field
1	"Task Name"	text	y	n	Task Description, may include ID
2	"Task Scheduled Start Date"	date	y	n	ES - Start Date
3	"Task Scheduled Finish Date"	date	y	n	EF- Finish Date
4	"Task Baseline Start Date"	date	n	n	
5	"Task Base Line Finish Date"	date	n	n	
6	"Task Baseline Cost"	number	n	n	
7	"Task Baseline Work Hours"	number	n	n	
8	"Task Actual Start Date"	date	y	y	AS - Actual Start
9	"Task Actual Finish Date"	date	y	y	AF - Actual Finish Date
10	"Task Actual Cost"	number	n	n	
11	"Task Actual Work Hours"	number	n	n	
12	"Task Actual Percent Complete"	number	y	y	Pct
13	"Task Additional Cost"	number	n	n	
14	"Task Total Cost"	number	n	n	
15	"Task Priority"	number	n	n	
16	"Task WBS Code"	text	y	n	WBS code
17	"Task OBS Code"	text	n	n	
18	"Task Notes"	text	n	n	
19	"Task Responsible Manager"	text	n	n	N/A
20	"Task Keyword"	text	n	n	Keyword
21	"Project As Of Date"	date	n	n	
22	"Project Task Count"	number	y	n	(computed)
23	"Project Start Date"	date	n	n	
24	"Assignment Resource Name"	text	y	n	Resource Name
25	"Assignment Resource Index"	number	y		N/A (computed)
26	"Assignment Work Rate Percent"	number	y	n	computed from work and dur remaining

27	"Assignment Total Work Hours"	number	y	y	QTYAt Complete
28	"Assignment Baseline Work Hours"	number	y	n	Budget Quantity
29	"Assignment Actual Work Hours"	number	y	y	QTYToDate
30	"Assignment Scheduled Overtime Work"	number	n	n	N/A
31	"Assignment Actual Overtime Work"	number	n	n	N/A
32	"Assignment Total Cost"	number	y	n,see text	CostAt Completion
33	"Assignment Baseline Cost"	number	y	n	BudgetCost
34	"Assignment Actual Cost"	number	y	y	CostToDate
35	"Assignment Start Date"	date	y	n	N/A - From Task Start
36	"Assignment Finish Date"	date	y	n	N/A - From Task Finish
37	"Assignment Duration"	number (hours)	n	n	N/A
38	"Assignment Work Rate"	number (0-100)	y	n	computed from work and duration and capacity
39	"Assignment Percent Complete"	number (0-100)	y	y	PctComplete
40	"Assignment Actual Start Date"	date	y	n	N/A Used to set Task Actual Start
41	"Assignment Actual Finish Date"	date	y	n	N/A Used to set Task Actual Finish
42	"Assignment History"	text	n	n	
43	"Resource Name" (this name is the result of the Edit Resource Selection renaming option if that is used)	text	y	n	Resouce ID
44	"Resource Standard Cost"	number	n	n	
45	"Resource Overtime Cost"	number	n	n	N/A
46	"Resource Cost Per Use"	number	n	n	
47	"Resource Capacity"	number	y	n	LimitVal 1
48	"Resource Special Units"	text	y	n	Unit Of Measure
49	"Resource Initials"	text	y	n	Resource ID
50	"Resource Notes"	text	n	n	
51	"Resource Code"	text	y	n	Resource Title
52	"Resource Group Code"	text	n	n	N/A

53	"Resource Original Name" (this name is used if the Resource Name has been adjusted using Edit Resource Selection)	text	y	n	Resource ID
54	"Resource Index"	number	y	n	N/A (computed)
55	"Task Index"	number	y	n	N/A (computed)
56	"Task Hierarchy"	text	y	n	from pv options dialog
57	"Assignment Work Remaining"	number	y	y	QTYAt Complete-QTYToDate
58	"Task AUX1/TEXT1"	text	y	n	Custom Activity Item "AUX1"
59	"Task AUX2/TEXT2"	text	y	n	Custom Activity Item "AUX2"
60	"Task AUX3/TEXT3"	text	y	n	Custom Activity Item "AUX3"
61	"Task AUX4/TEXT4"	text	y	n	Custom Activity Item "AUX4"
62	"Task AUX5/TEXT5"	text	y	n	Custom Activity Item "AUX5"
63	"Task AUX6/TEXT6"	text	y	n	Custom Activity Item "AUX6"
64	"Task AUX7/TEXT7"	text	y	n	Custom Activity Item "AUX7"
65	"Task AUX8/TEXT8"	text	y	n	Custom Activity Item "AUX8"
66	"Task AUX9/TEXT9"	text	y	n	Custom Activity Item "AUX9"
67	"Assignment Account Code"	text	y	n	Resource Account Field

The task **remaining duration** field is imported into the pg_remdur field of the assignment document(s). When updating, it is either calculated based upon percent complete, or set directly during update from the largest value of pg_remdur field in the assignment document(s) of that task.

Primavera projects may use Days, Hours or Weeks as the planning units.