

BFVZ POWERHealth

Resource Data Setup Guide

How to configure single-table and two-table resource data models for BFVZPowerHealth in Power BI. Covers Primavera P6 and Microsoft Project exports, Power BI relationship setup, field mapping, and troubleshooting.

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Overview

POWERHealth supports two data models for resource assignments:

Single-table (simple): One Excel sheet with all schedule and resource data. Resources are listed as a single name per row or comma-separated. Budgeted work is the total for the task, split equally across resources.

Two-table (recommended): Two Excel sheets — Schedule and Resource Assignments — connected via a Power BI relationship. Each resource assignment has its own budgeted hours. This matches how Primavera P6 and Microsoft Project store data natively.

***Note:** The two-table model produces more accurate resource leveling because the optimizer knows each resource's actual workload rather than assuming equal splits.*

Exporting from Primavera P6

Step 1: Export Activities

1. Open your project in Primavera P6 Professional.
2. Go to **File** → **Export**.
3. Select **Spreadsheet (XLSX)**.
4. In Export Type, check **Activities** only.
5. Select the project to export.
6. Choose or modify a template with these columns: Activity ID, Activity Name, WBS Name, Start, Finish, BL Project Start, BL Project Finish, Physical % Complete, Predecessors, Constraint Type.
7. Save as your Schedule file.

Step 2: Export Resource Assignments

1. Go to **File** → **Export** again.
2. Select **Spreadsheet (XLSX)**.
3. In Export Type, check **Resource Assignments** only.
4. Select the same project.
5. Choose or modify a template with these columns: Activity ID, Resource ID (or Resource Name), Budgeted Units, Actual Units.
6. Save as your Resource Assignment file.

Tip: Primavera P6 can export both in one file — Activities and Resource Assignments land on separate worksheet tabs (TASK and TASKRSRC). You can use this directly.

Exporting from Microsoft Project

Step 1: Export Using the Export Wizard

1. Open your project in Project Professional.
2. Go to **File** → **Save As** → **Excel Workbook**.
3. In the Export Wizard, select **New Map**.
4. Check **Tasks** and **Assignments**.
5. On the Task Mapping step, add: ID, Name, Start, Finish, Baseline Start, Baseline Finish, % Complete, Predecessors, Constraint Type.
6. On the Assignment Mapping step, add: Task ID, Resource Name, Work, Actual Work.
7. Save — this creates an Excel file with separate tabs for Task_Table and Assignment_Table.

Note: You may rename sheets (e.g., Task_Table → Schedule) for clarity, but it is not required. POWERHealth reads data from Power BI's data model, not sheet names.

Power BI Setup

Step 1: Import Both Tables

1. Open Power BI Desktop.
2. Click **Get Data** → **Excel Workbook**.
3. Select your Excel file.
4. In the Navigator, check both sheets (**Schedule** and **ResourceAssignment**).
5. Click **Load**.

Step 2: Create the Relationship

1. Click the **Model view** icon (three connected boxes) on the left sidebar.
2. You should see both tables. If Power BI auto-detected a relationship on Task ID, you're done.
3. If not: drag **Task ID** from the Schedule table onto **Task ID** in the ResourceAssignment table.
4. In the relationship dialog: Cardinality = **One to Many** (Schedule is the "one" side), Cross filter direction = **Single**, Make this relationship active = **Yes**.
5. Click **OK**.

Step 3: Add POWERHealth Visual and Map Fields

Switch to Report view and add the BFVZ POWERHealth visual to your canvas. Map the following fields from each table:

From the Schedule table:

Data Role	Field
Project Name	Project
Phase	Phase
Task Name	Task Name
Task ID	Task ID
Milestone Type	Milestone Type
Predecessors	Predecessors
Start Date	Start Date
Finish Date	Finish Date
Planned Start	Planned Start
Planned End	Planned End
Progress	Progress %
Constraint Type	Constraint Type

From the ResourceAssignment table:

Data Role	Field
Resource Name	Resource Name
Budgeted Work	Budgeted Work
Actual Work	Actual Work
Resource Capacity	Resource Capacity

Note: Power BI joins the tables automatically via the Task ID relationship — the visual receives one row per resource assignment with the correct per-resource budgeted hours.

Verifying the Setup

- **Task count** — The header should show the correct number of unique tasks (not inflated by resource rows).
- **Resource Panel** — Expand the Resource Panel. Overallocated resources should show realistic peak percentages.
- **Multi-resource tasks** — In the risk register, find a task with multiple resources. It should show all assigned resources separately, not a comma-separated string.

Troubleshooting

"I see duplicate tasks"

The relationship is missing. Go to Model view and create the Task ID → Task ID relationship.

"Resource names are blank"

The Resource Name field is mapped from the wrong table. Make sure it comes from the **ResourceAssignment** table, not the Schedule table.

"Budgeted work seems too high"

If using a single-table setup with comma-separated resources, Budgeted Work should be the total for the task. If using two tables, Budgeted Work on each row should be for that specific resource only.

"I only have one table"

That works fine — POWERHealth detects single-table data and falls back to the original behavior. The two-table model is recommended for multi-resource tasks with different hour allocations.

"My P6 export has Activity ID, not Task ID"

Just rename the column or map Activity ID to the Task ID data role in Power BI. The field name doesn't matter — only the data role mapping.

Column Reference

Schedule Table (* = required)

Column	Primavera P6 Name	Microsoft Project Name
Task Name *	Activity Name	Name
Task ID *	Activity ID	ID / Unique ID
Start Date *	Start / Actual Start	Start
Finish Date *	Finish / Actual Finish	Finish
Project	WBS Name	Project Name
Phase	WBS Level 2	Outline Level 2
Predecessors	Predecessors	Predecessors
Planned Start	BL Start	Baseline Start
Planned End	BL Finish	Baseline Finish
Progress %	Physical % Complete	% Complete
Milestone Type	Activity Type = Milestone	Milestone = Yes
Constraint Type	Constraint Type	Constraint Type

ResourceAssignment Table (* = required)

Column	Primavera P6 Name	Microsoft Project Name
Task ID *	Activity ID	Task ID
Resource Name *	Resource Name / Resource ID	Resource Name
Budgeted Work *	Budgeted Units (h)	Work (h)
Actual Work	Actual Units (h)	Actual Work (h)
Resource Capacity	Max Units/Time (h/d)	Max Units x 8h

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