Step 3 - Importing the project tasks

You're now going to import the tasks from the `Demo Project V5.xls` file.

Open the file to be imported (in this case `Demo Project V5.xlsx`), then select and copy into the clipboard all tasks data **header included**:

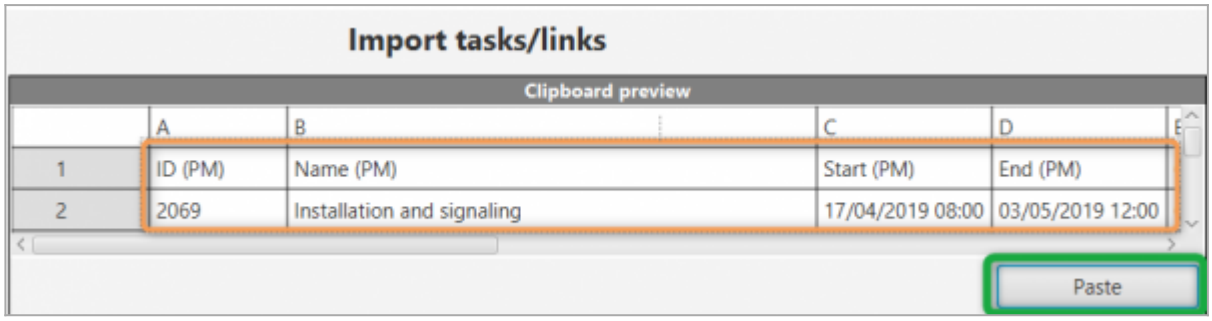
ID	Parent	Name	Start	End	Calendar	Area	Impact	Impact type	Task Template
2	PM-00001	Phase 2 : 1/4 ROUNDABOUT East							
3	PM-00001	Phase 3 : 1/4 ROUNDABOUT West							
31	PM-00001	Phase 3b : ROUNDABOUT Central Platform							
4	PM-00001	Phase 4 : Road - North Lane							
5	PM-00001	Phase 5 : Road - South Lane							
6	PM-00001	Phase 6 : Final Paving							
2069	1	Installation and signaling	17/04/2019 08:00	03/05/2019 12:00	5 days 8 hours calendar	Roundabout North			Signalisation
2097	1	Sidewalks demolition	22/05/2019 08:00	24/05/2019 15:00	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Bordures
2125	1	paving milling and asphalt recycling	25/05/2019 08:00	29/05/2019 15:00	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Revêtements
2153	1	Road widening + drainage	30/05/2019 08:00	01/06/2019 15:00	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Chaussée et canalisations
2181	1	Coating and backfilling excavations	05/06/2019 08:00	07/06/2019 15:00	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Réseaux, remblayages et structure
2209	1	Sidewalks and cobblestone installation	08/06/2019 08:00	08/06/2019 15:00	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Bordures et pavés
2237	1	Topsil levelling	11/06/2019 16:00	11/06/2019 16:00	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Terre végétale
2265	1	Pavement milling	12/06/2019 08:00	13/06/2019 15:00	5 days 8 hours calendar	Roundabout North			Fraisage
2293	1	Subgrade layer	14/06/2019 08:00	15/06/2019 15:00	5 days 8 hours calendar	Roundabout North			Planie
2321	1	Base layer	19/06/2019 08:00	22/06/2019 09:55	5 days 8 hours calendar	Roundabout North			Couche roulement récap jour
2349	1	Sidewalks coating	22/06/2019 09:55	22/06/2019 14:10	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Revêtements
2377	1	Signaling	22/06/2019 14:10	22/06/2019 15:00	5 days 8 hours calendar	Roundabout North			Signalisation
2405	3	Sidewalks demolition	26/07/2019 08:00	27/07/2019 15:00	5 days 8 hours calendar	Roundabout West : Sidewalks			Bordures
2433	3	Installation and signaling	24/07/2019 08:00	25/07/2019 15:00	5 days 8 hours calendar	Roundabout West			Signalisation
2461	3	Signaling	22/08/2019 08:08	22/08/2019 12:23	5 days 8 hours calendar	Roundabout West			Signalisation
2489	3	paving milling and asphalt recycling	31/07/2019 08:00	31/07/2019 15:00	5 days 8 hours calendar	Roundabout West : Sidewalks			Revêtements
2517	3	Road widening + drainage	01/08/2019 08:00	03/08/2019 14:22	5 days 8 hours calendar	Roundabout West : Sidewalks			Chaussée et canalisations
2545	3	Coating and backfilling excavations	07/08/2019 08:00	08/08/2019 14:22	5 days 8 hours calendar	Roundabout West : Sidewalks			Réseaux, remblayages et structure
2573	3	Sidewalks and cobblestone installation	08/08/2019 14:22	09/08/2019 14:22	5 days 8 hours calendar	Roundabout West : Sidewalks			Bordures et pavés

Explanations:

1/ The summary tasks are imported first (IDs 2 → 6)
2/ Each task is referred to a summary task, via the “Parent” column.
3/ Each task must have a parent: in the absence of a summary tasky, the subproject (here PM-00001) is then mentioned, which is therefore here the parent of the summary tasks.

Go to the menu ***Options > Import tasks/links*** .

In the import window that opens, insert the data from the clipboard by clicking on the ***Paste*** button:

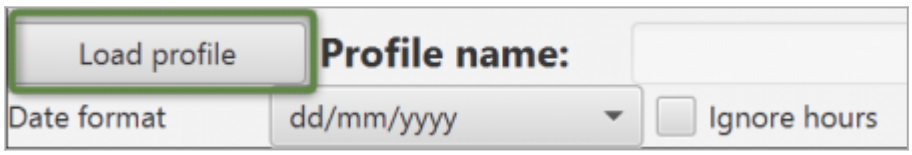


The preview area shows you that the data has been read from the clipboard. You can then assign each column to a Phase Manager field, either manually or by importing an existing exchange profile.

Here we'll load the profile `Import ProfileEN.pmx` (delivered with your installation).

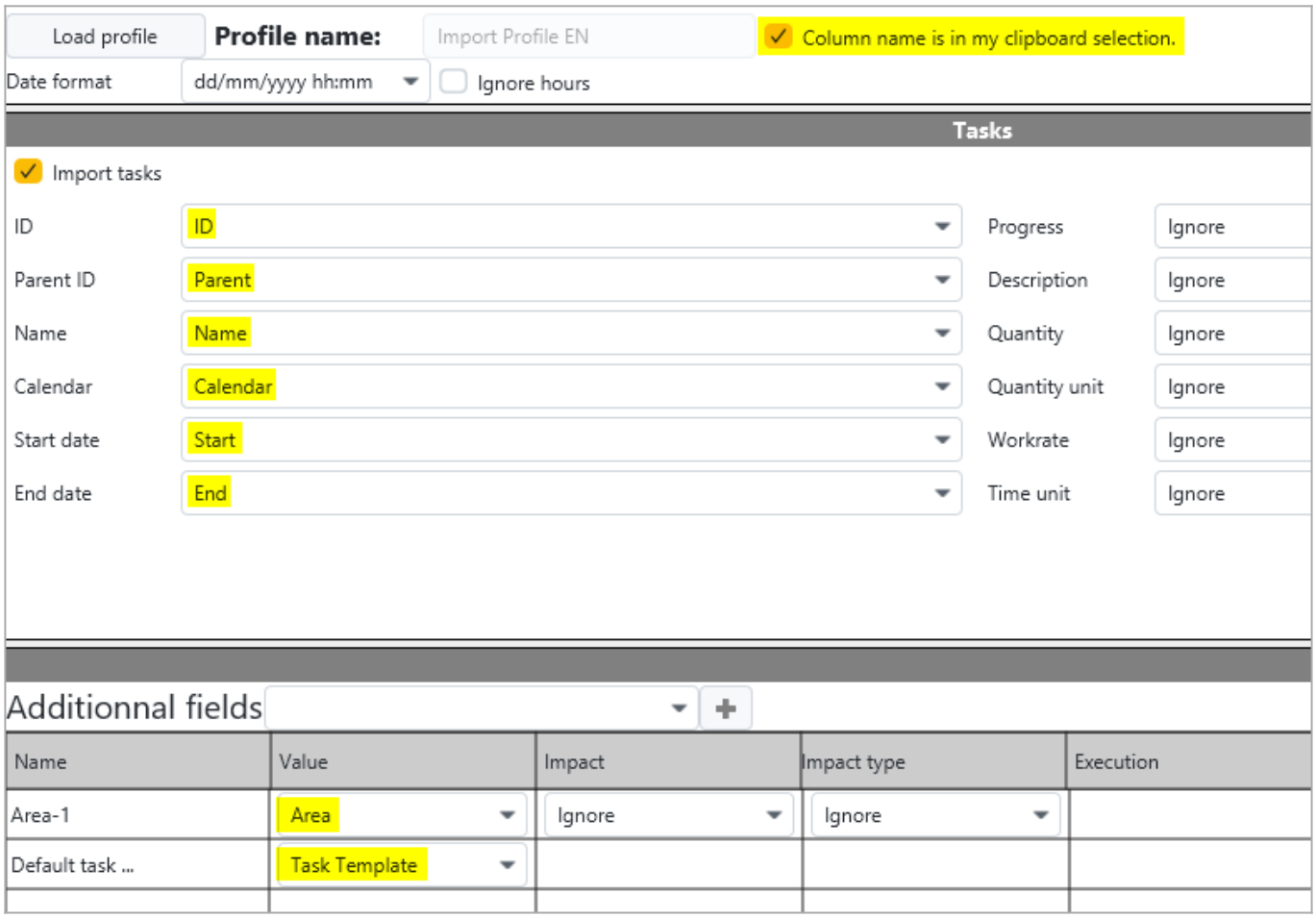
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Click on the ***Load profile*** button:



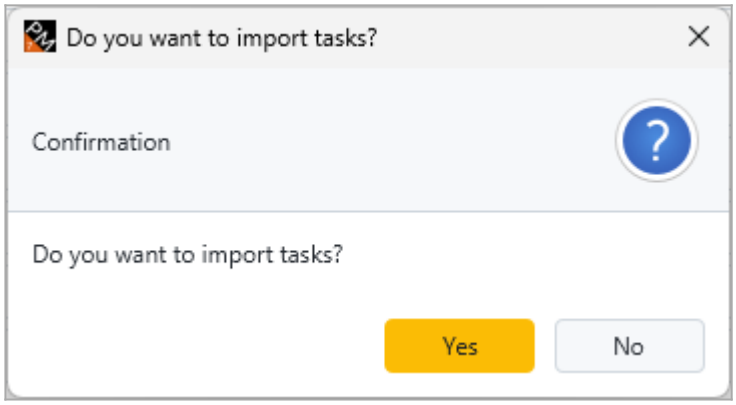
Then browse your hard drive for the exchange profile and click on ***Open*** .

Then check that the display is as follow:



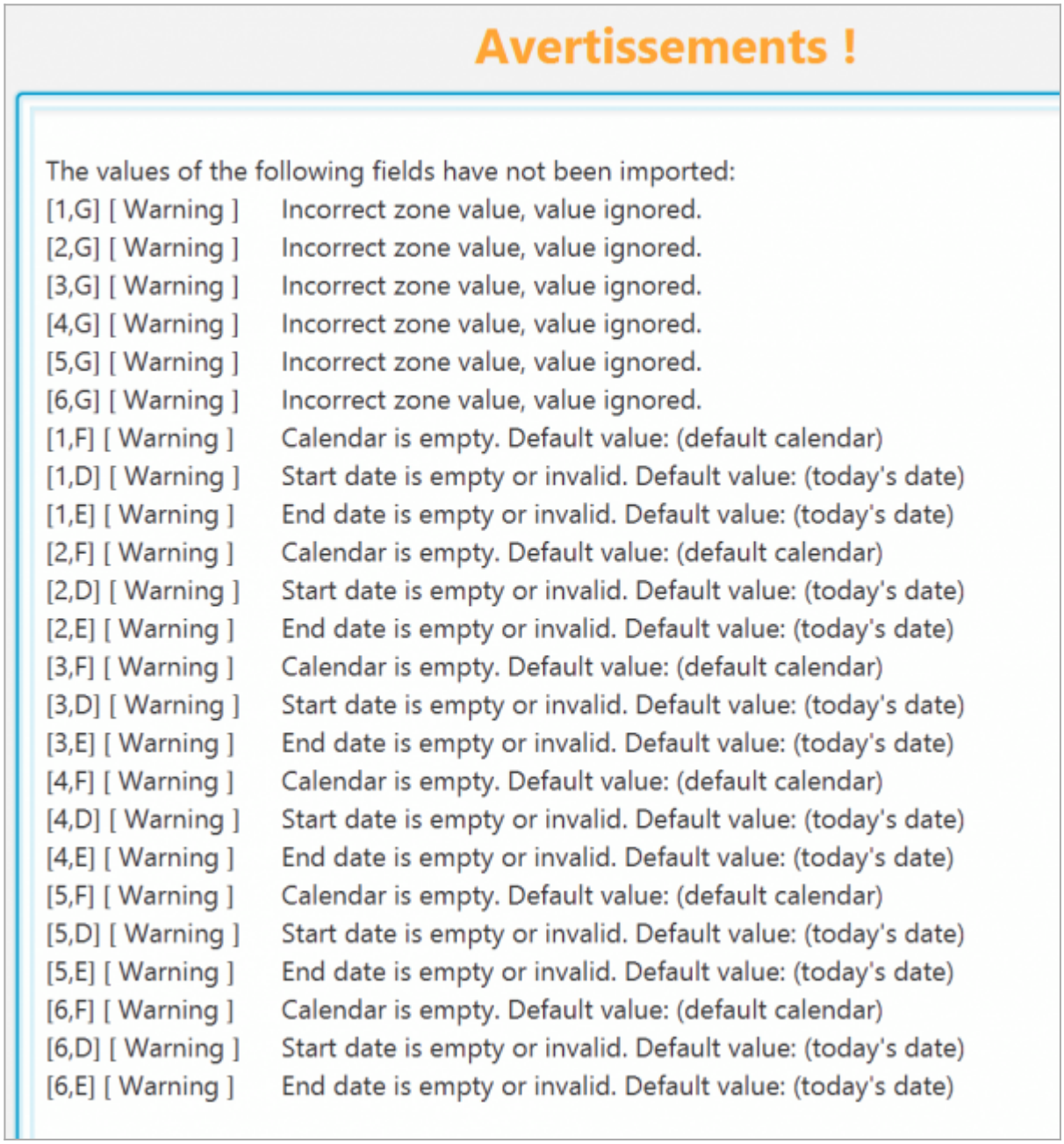
You see that the fields from you data set have been correctly assigned to the corresponding Phase Manager fields; you can click on the ***Import*** button at the bottom right of the window and then confirm the import :

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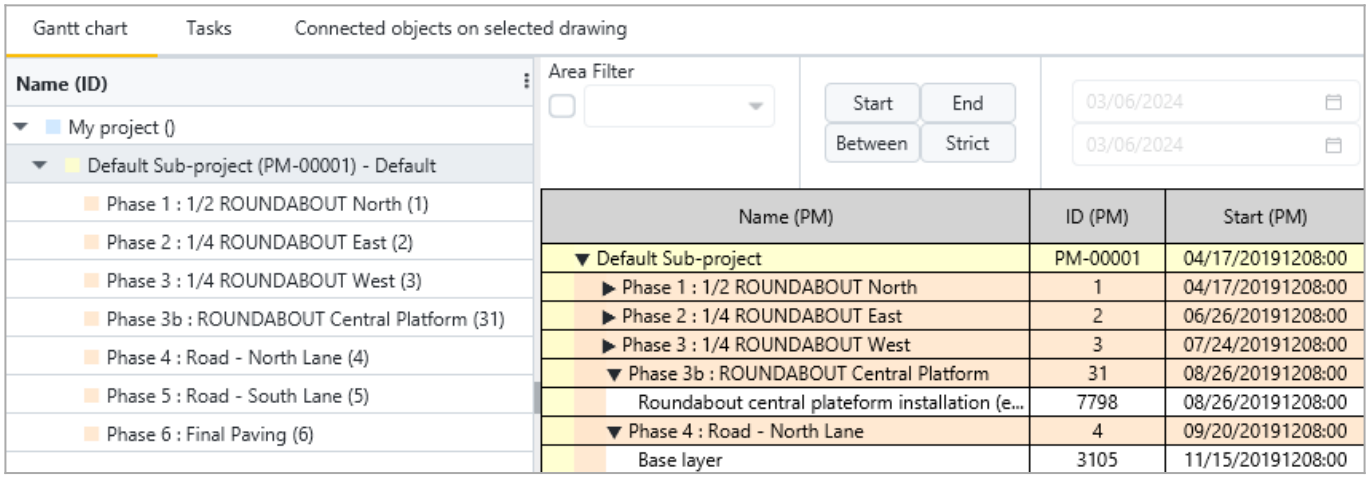


Note on the warning window:
A window tells you that some fields have not been imported:this is informative, and concerns the empty fields “Area” and “Dates” for the summary tasks; Area having no meaning, and Dates are inherited from its child tasks:

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After closing the import window, you can see that tasks have been imported, and that the WBS matching our imported phases has been created:



How to import tasks

You can now go to step 4 of this tutorial !

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