

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 task, 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:

Import tasks/links

Clipboard preview

	A	B	C	D	E
1	ID (PM)	Name (PM)	Start (PM)	End (PM)	
2	2069	Installation and signaling	17/04/2019 08:00	03/05/2019 12:00	

Paste

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).

Click on the **Load profile** button:

Load profile

Profile name:

Date format

dd/mm/yyyy

☐ Ignore hours

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

Then check that the display is as follow:

Load profile

Profile name: Import Profile EN

☒ Column name is in my clipboard selection.

Date format

dd/mm/yyyy hh:mm

☐ Ignore hours

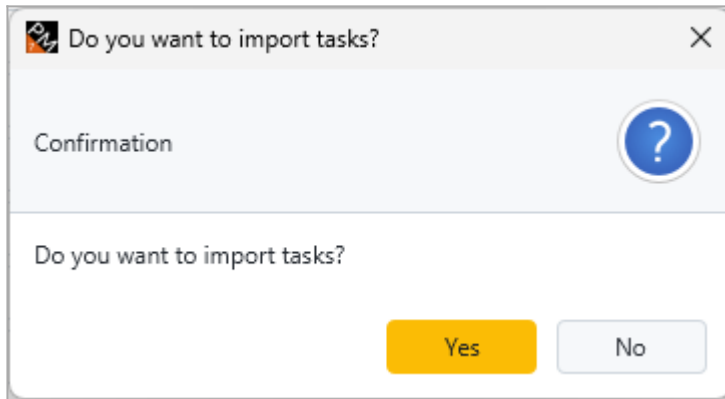
Tasks				
<input checked="" type="checkbox"/> Import tasks				
ID	ID	Progress	Ignore	
Parent ID	Parent	Description	Ignore	
Name	Name	Quantity	Ignore	
Calendar	Calendar	Quantity unit	Ignore	
Start date	Start	Workrate	Ignore	
End date	End	Time unit	Ignore	

Additional fields

+

Name	Value	Impact	Impact type	Execution
Area-1	Area	Ignore	Ignore	
Default task ...	Task Template			

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 :



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:

Avertissements !

The values of the following fields have not been imported:

[1,G] [Warning]	Incorrect zone value, value ignored.
[2,G] [Warning]	Incorrect zone value, value ignored.
[3,G] [Warning]	Incorrect zone value, value ignored.
[4,G] [Warning]	Incorrect zone value, value ignored.
[5,G] [Warning]	Incorrect zone value, value ignored.
[6,G] [Warning]	Incorrect zone value, value ignored.
[1,F] [Warning]	Calendar is empty. Default value: (default calendar)
[1,D] [Warning]	Start date is empty or invalid. Default value: (today's date)
[1,E] [Warning]	End date is empty or invalid. Default value: (today's date)
[2,F] [Warning]	Calendar is empty. Default value: (default calendar)
[2,D] [Warning]	Start date is empty or invalid. Default value: (today's date)
[2,E] [Warning]	End date is empty or invalid. Default value: (today's date)
[3,F] [Warning]	Calendar is empty. Default value: (default calendar)
[3,D] [Warning]	Start date is empty or invalid. Default value: (today's date)
[3,E] [Warning]	End date is empty or invalid. Default value: (today's date)
[4,F] [Warning]	Calendar is empty. Default value: (default calendar)
[4,D] [Warning]	Start date is empty or invalid. Default value: (today's date)
[4,E] [Warning]	End date is empty or invalid. Default value: (today's date)
[5,F] [Warning]	Calendar is empty. Default value: (default calendar)
[5,D] [Warning]	Start date is empty or invalid. Default value: (today's date)
[5,E] [Warning]	End date is empty or invalid. Default value: (today's date)
[6,F] [Warning]	Calendar is empty. Default value: (default calendar)
[6,D] [Warning]	Start date is empty or invalid. Default value: (today's date)
[6,E] [Warning]	End date is empty or invalid. Default value: (today's date)

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

Gantt chart

Tasks

Connected objects on selected drawing

Name (ID)

▼

My project ()

▼

Default Sub-project (PM-00001) - Default

Phase 1 : 1/2 ROUNDABOUT North (1)

Phase 2 : 1/4 ROUNDABOUT East (2)

Phase 3 : 1/4 ROUNDABOUT West (3)

Phase 3b : ROUNDABOUT Central Platform (31)

Phase 4 : Road - North Lane (4)

Phase 5 : Road - South Lane (5)

Phase 6 : Final Paving (6)

Area Filter

☐

Start

End

Between

Strict

03/06/2024

03/06/2024

Name (PM)	ID (PM)	Start (PM)
▼ Default Sub-project	PM-00001	04/17/20191208:00
▶ Phase 1 : 1/2 ROUNDABOUT North	1	04/17/20191208:00
▶ Phase 2 : 1/4 ROUNDABOUT East	2	06/26/20191208:00
▶ Phase 3 : 1/4 ROUNDABOUT West	3	07/24/20191208:00
▼ Phase 3b : ROUNDABOUT Central Platform	31	08/26/20191208:00
Roundabout central platform installation (e...	7798	08/26/20191208:00
▼ Phase 4 : Road - North Lane	4	09/20/20191208:00
Base layer	3105	11/15/20191208:00

How to import tasks

You can now go to [step 4 of this tutorial](#) !