

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

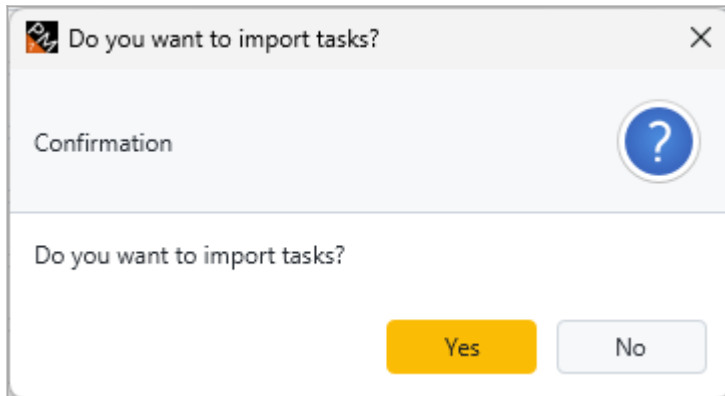
| Tasks | | | | |
|--|----------|---------------|--------|--|
| <input checked="" type="checkbox"/> Import tasks | | | | |
| ID | ID | Progress | Ignore | |
| Parent ID | Parent | Description | Ignore | |
| Name | Name | Quantity | Ignore | |
| Calendar | Calendar | Quantity unit | Ignore | |
| Start 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](#) !