

# **Import Export**

File menu

- Import Export
- Exporting the project's KML
- Save project as a template
- Archive a project

The importation and exportation of tasks and links are done:

- through the clipboard
- using exchange profiles if needed

**Exchange profiles** allow you to keep a matrix of data columns associated with Phase Manager fields. Simply load the correct exchange profile, copy and paste the data into the import window, and your data is processed!

Links cannot be updated: the easiest way is to do a full import of activities and links to recreate those latter with their new properties.

To save time, you can use the exchange profiles and sample data tables provided: PMX and data sources.

Here is a simple example of importing activities:

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 N	ame Start	End	Calendar	Area	Impact	Impact type	Task Template
2	PM-00001 Phase 2 : 1/4 ROU	INDABOUT East						
3	PM-00001 Phase 3 : 1/4 ROU	INDABOUT West						
31	PM-00001 Phase 3b : ROUN	DABOUT Central Platform						
4	PM-00001 Phase 4 : Road - N	lorth Lane						
5	PM-00001 Phase 5 : Road - S	South Lane						
6	PM-00001 Phase 6 : Final Par	ving						
2069	1 Installation and sig	naling 17/04/2019 0	3:00 03/05/2019 12:00	0 5 days 8 hours calendar	Roundabout North			Signalisation
2097	1 Sidewalks demolitie	on 22/05/2019 0	3:00 24/05/2019 15:00	0 5 days 8 hours calendar	Roundabout North : Sidewalks 1			Bordures
2125	1 paving milling and a	asphalt recycling 25/05/2019 0	3:00 29/05/2019 15:00	0 5 days 8 hours calendar	Roundabout North : Sidewalks 1			Revêtements
2153	1 Road widening + d	rainage 30/05/2019 0	3:00 01/06/2019 15:00	0 5 days 8 hours calendar	Roundabout North : Sidewalks 1			Chaussée et canalisations
2181	1 Coating and backfi	ling excavations 05/06/2019 0	3:00 07/06/2019 15:00	0 5 days 8 hours calendar	Roundabout North : Sidewalks 1			Réseaux, remblayages et structure
2209	1 Sidewalks and cob	blestone installation 08/06/2019 0	3:00 08/06/2019 15:00	0 5 days 8 hours calendar	Roundabout North : Sidewalks 1			Bordures et pavés
2237	1 Topsil leveling	11/06/2019 1	5:00 11/06/2019 16:00	0 5 days 8 hours calendar	Roundabout North : Sidewalks 1			Terre végétale
2265	1 Pavement milling	12/06/2019 0	3:00 13/06/2019 15:00	0 5 days 8 hours calendar	Roundabout North			Fraisage
2293	1 Subgrade layer	14/06/2019 0	3:00 15/06/2019 15:00	0 5 days 8 hours calendar	Roundabout North			Planie
2321	1 Base layer	19/06/2019 0	3:00 22/06/2019 09:55	5 5 days 8 hours calendar	Roundabout North			Couche roulement récap jour
2349	1 Sidewalks coating	22/06/2019 0	9:55 22/06/2019 14:10	0 5 days 8 hours calendar	Roundabout North : Sidewalks 1			Revêtements
2377	1 Signaling	22/06/2019 1	1:10 22/06/2019 15:00	0 5 days 8 hours calendar	Roundabout North			Signalisation
2405	3 Sidewalks demolitie	on 26/07/2019 0	3:00 27/07/2019 15:00	0 5 days 8 hours calendar	Roundabout West : Sidewalks			Bordures
2433	3 Installation and signature	naling 24/07/2019 0	3:00 25/07/2019 15:00	0 5 days 8 hours calendar	Roundabout West			Signalisation
2461	3 Signaling	22/08/2019 0	3:08 22/08/2019 12:23	3 5 days 8 hours calendar	Roundabout West			Signalisation
2489	3 paving milling and a	sphalt recycling 31/07/2019 0	3:00 31/07/2019 15:00	0 5 days 8 hours calendar	Roundabout West : Sidewalks			Revêtements
2517	3 Road widening + d	rainage 01/08/2019 0	3:00 03/08/2019 14:22	2 5 days 8 hours calendar	Roundabout West : Sidewalks			Chaussée et canalisations
2545	3 Coating and backfi	ling excavations 07/08/2019 0	3:00 08/08/2019 14:22	2 5 days 8 hours calendar	Roundabout West : Sidewalks			Réseaux, remblayages et structure
2573	3 Sidewalks and cob	blestone installation 08/08/2019 1-	1:22 09/08/2019 14:22	2 5 days 8 hours calendar	Roundabout West : Sidewalks			Bordures et pavés

## Explanations:

1/ The summary tasks are imported first (IDs  $2 \rightarrow 6$ )

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 *File > 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 pr	eview			
	A	В		с	D	EÂ
1	ID (PM)	Name (PM)		Start (PM)	End (PM)	۲
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 nam	e:	Tutorial Ta	sk	ks importation		Column	name is in my clipb	oard selection.		
Date format	dd/mm/yyyy hh:m	m 🔻	Ignore	e ł	nours						
Tasks											
✓ Import tasks											
ID	ID				•		Progress	Ignore			
Parent ID	Parent				Ŧ		Description	Ignore			
Name	Name				•		Quantity	Ignore			
Calendar	Calendar				Ŧ		Quantity unit	Ignore			
Start date	Start				•		Workrate	Ignore			
End date	End				Ŧ		Time unit	Ignore			
Additionnal	fields				-		+				
Name	Value	Impact	:		mpact type		Execution	Full axis	Start distance		
Area-1	Area 🔹	Ignor	e 👻		lgnore 🔻	•					
Style par déf	Task Te 🔻			T							

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 :

📀 Do you want to import tasks	?	×
Confirmation		?
Do you want to import tasks?		
	Yes	c

Note on the warning window:

A window tells you that some fields have not been imported: this is informative, and concerns the empty

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Phase Mar

child tasks:

Le phasage travaux **DYNAMIQUE** 

la

The values of the fo	ollowing 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)

fields "Area" and "Dates" for the summary tasks; Area having no meaning, and Dates are inherited from its

**Avertissements !** 

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 dra	win	9					
Name (ID)	+	Area Filter					
<ul> <li>My project ()</li> </ul>	-	Start	End				
🗧 📕 Sous-projet par défaut (PM-00001) - Default		Between	Strict		1: 🔺		
Phase 1 : 1/2 ROUNDABOUT North (1)		Name (	PM)		ID (PM)	Start (PM)	
Phase 2 : 1/4 ROUNDABOUT East (2)		▼ Sous-projet par défaut			PM-00001	17/04/2019 08:00	
Phase 3 : 1/4 ROUNDABOUT West (3)	Phase 1 : 1/2 ROUNDABOUT North			1	17/04/2019 08:00		
<ul> <li>Phase 3b : ROUNDABOUT Central Platform (31)</li> <li>Phase 4 : Road - North Lane (4)</li> <li>Phase 5 : Road - South Lane (5)</li> </ul>		Phase 2 : 1/4 ROUNDABOUT East			2	26/06/2019 08:00	
		Phase 3 : 1/4 R	OUNDABOU	T West	3	24/07/2019 08:00	
		Phase 3b : ROUNDABOUT Centra			31	26/08/2019 08:00	
		Roundabout	central plate	form i	7798	26/08/2019 08:00	
Phase 6 : Final Paving (6)		Phase 4 : Road - North Lane			4	20/09/2019 08:00	
		Base layer			3105	15/11/2019 08:00	

How to import tasks