

## 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**:

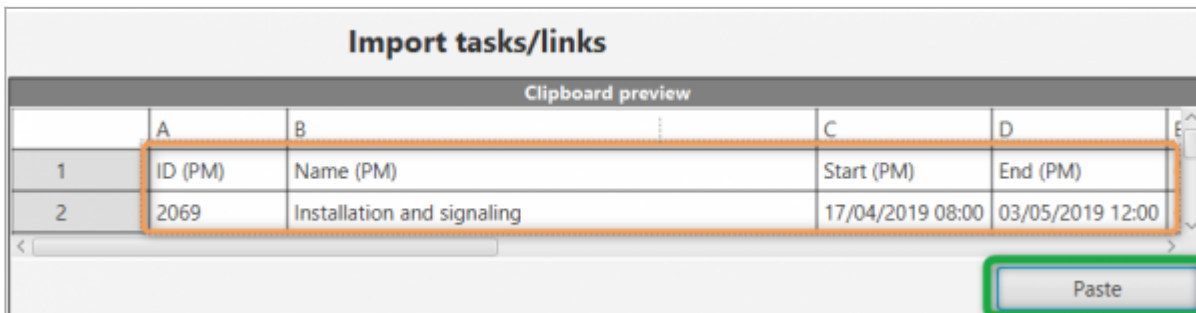
ID	Parent	Name	Start	End	Calendar	Area	Impact	Impact type	Task Template
2	PM-00001	Phase 2 : 1/4 ROUNDABOUT East							
3	PM-00001	Phase 3 : 1/4 ROUNDABOUT West							
31	PM-00001	Phase 3b : ROUNDABOUT Central Platform							
4	PM-00001	Phase 4 : Road - North Lane							
5	PM-00001	Phase 5 : Road - South 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 **File > Import tasks/links**.

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



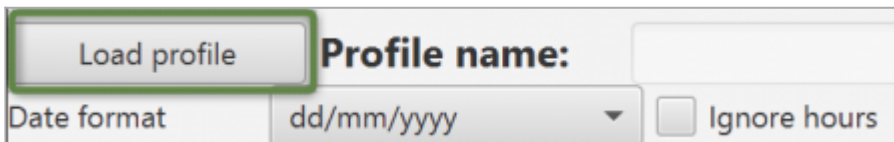
	A	B	C	D	E
1	ID (PM)	Name (PM)	Start (PM)	End (PM)	
2	2069	Installation and signaling	17/04/2019 08:00	03/05/2019 12:00	

**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:** Tutorial Tasks importation ☒ Column name is in my clipboard selection.

Date format dd/mm/yyyy hh:mm ☐ Ignore hours

**Tasks**


☒ 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	Full axis	Start distance
Area-1	Area	Ignore	Ignore			
Style par déf...	Task Te...					

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?

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 ()  
 ▼ Sous-projet par défaut (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

12/23/2020

12/23/2020

Between

Strict

Name (PM)	ID (PM)	Start (PM)
▼ Sous-projet par défaut	PM-00001	17/04/2019 08:00
▶ Phase 1 : 1/2 ROUNDABOUT North	1	17/04/2019 08:00
▶ Phase 2 : 1/4 ROUNDABOUT East	2	26/06/2019 08:00
▶ Phase 3 : 1/4 ROUNDABOUT West	3	24/07/2019 08:00
▼ Phase 3b : ROUNDABOUT Centra...	31	26/08/2019 08:00
Roundabout central platform I...	7798	26/08/2019 08:00
▼ Phase 4 : Road - North Lane	4	20/09/2019 08:00
Base layer	3105	15/11/2019 08:00

## How to import tasks