

## IMPORTING FROM PRIMAVERA (CSV)

Title	Importing from Primavera (CSV)
Category	IMPORT EXPORT
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## INTRODUCTION

### Please note batch files are better!

The CCS System has a much better facility for importing data from P3 namely using a P3 batch file. There is NO reason to use CSV to transfer data between P3 and SitePlan.

### Transaction problems with CSV

The exported file must be created with the correct columns.

The activities must be exported from P3 to the description file in a workable order.

The separator is assumed to be a COMMA. However, a SEMICOLON is used in some countries. Use the ADVANCED button when importing the file to adjust the separator if required.

The top line is assumed to be a header line. Any extra lines up to the first line of data will have to be deleted in Excel.

Date formats are assumed to be of the form dd/mm/yyyy. or dd/mm/yy.(1980 is the base date). The date separator may be a forward slash, dash or dot. Excel can be used to adjust date formats. Some specialised dates can also be used i.e. 5Feb02.

Durations can be of the form 5 Days, 5d, 1.5 Weeks, 3W, 3 Months, 3.8m etc.

### Data that is not exported by P3

Section Headers are not exported from P3 as they are created from a coding structure. Note that the headers are not exported via MPX either.

### Current restrictions in the CSV import

The base program, progress and resources are not imported.

Some milestone types and some starts/ends can't be correctly imported. Other special types are not imported i.e. Hammock types.

Links to external programs are not imported.

The calendar is not imported.

### Differences between P3 and SitePlan

In P3, a Start Lead is the number of **elapsed days** from the start of a predecessor to the start of the successor.

In SitePlan, a Start Lead is the number of **days of work done** in the predecessor before the successor can start. This will cause differences in results when there is progress out of sequence. The same applies to End Lags.

## Disclaimer

Due to differences in calculation and the activity types between products the responsibility for validating the results must lie with those providing the export file and those doing the import into SitePlan.

## Problems

Email the file that is being imported to siteplan@ccssa.com. Include your name, company, phone number (international format), version of CCS, version of the product that created the file and any special information i.e. the file has been exported on a non-English machine.

## METHOD

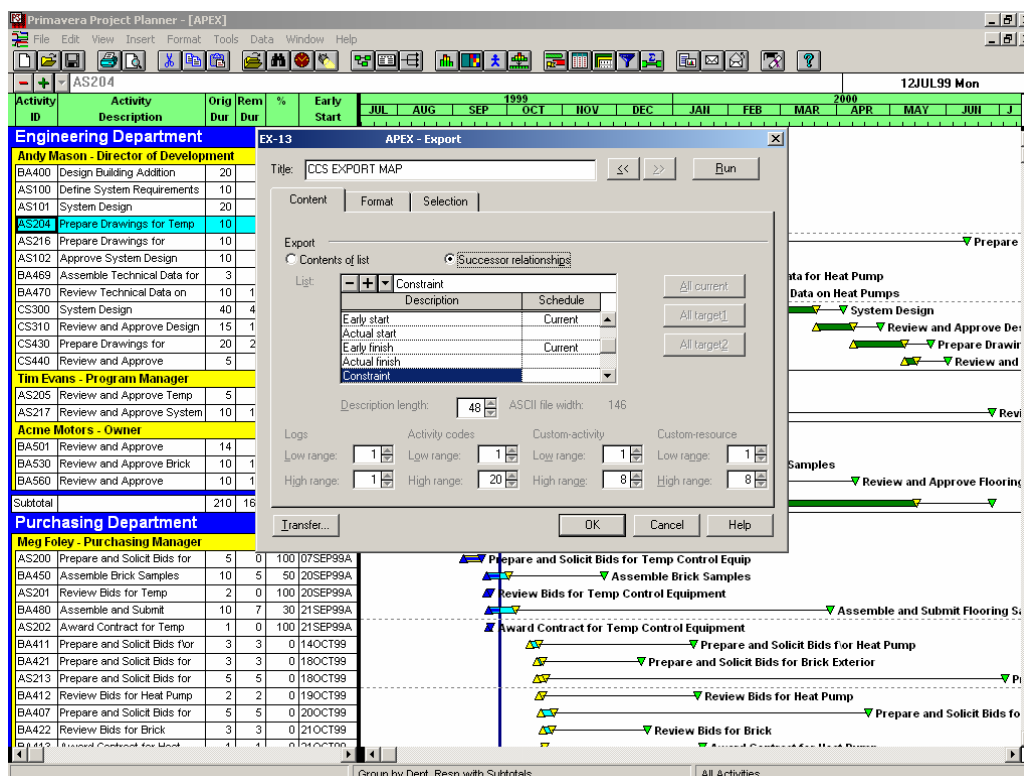
### In P3

- Save the program in P3 as a WK1 file with the following columns using the PROJECT UTILITIES\EXPORT menu. MAKE SURE THE FIELDS ARE IN THE EXACT ORDER AS SHOWN BELOW. Any extra columns can be exported as long as they are added after the "constraint" columns. They will be ignored by SitePlan, but can be used to order the data in Excel.

Activity id	(ACT)
Description	(TITLE)
Original duration	(OD)
Early start	(ES)
Actual start	(AS)
Early finish	(EF)
Actual finish	(AF)
Early Constraint	(ECON)
Early Constraint Date	(ECOND)
Late Constraint	(LCON)
Late Constraint Date	(LCOND)
Constraint	(CON)
Constraint Date	(COND)

NOTE that the CONSTRAINT columns are one column in the P3 selection – P3 will export the six columns for you.

- Make sure that the SUCCESSORS option is checked so that P3 will create a successor export file.



For the purpose of this document the files will be referred to as ACTDESC.WK1 and ACTSUC.WK1.

The activities should be exported in the natural order of the program. The natural order of a program is the standard way of programming in SitePlan where an activity describes a task i.e. "backfill" and a header structure describes where the activity fits into the program. Usually a work break down structure has been used in P3 and this can be used to order the activities in a logical manner.

This header structure will have to be added manually into SitePlan. A P3 printout of the program in the exported order will help this process.

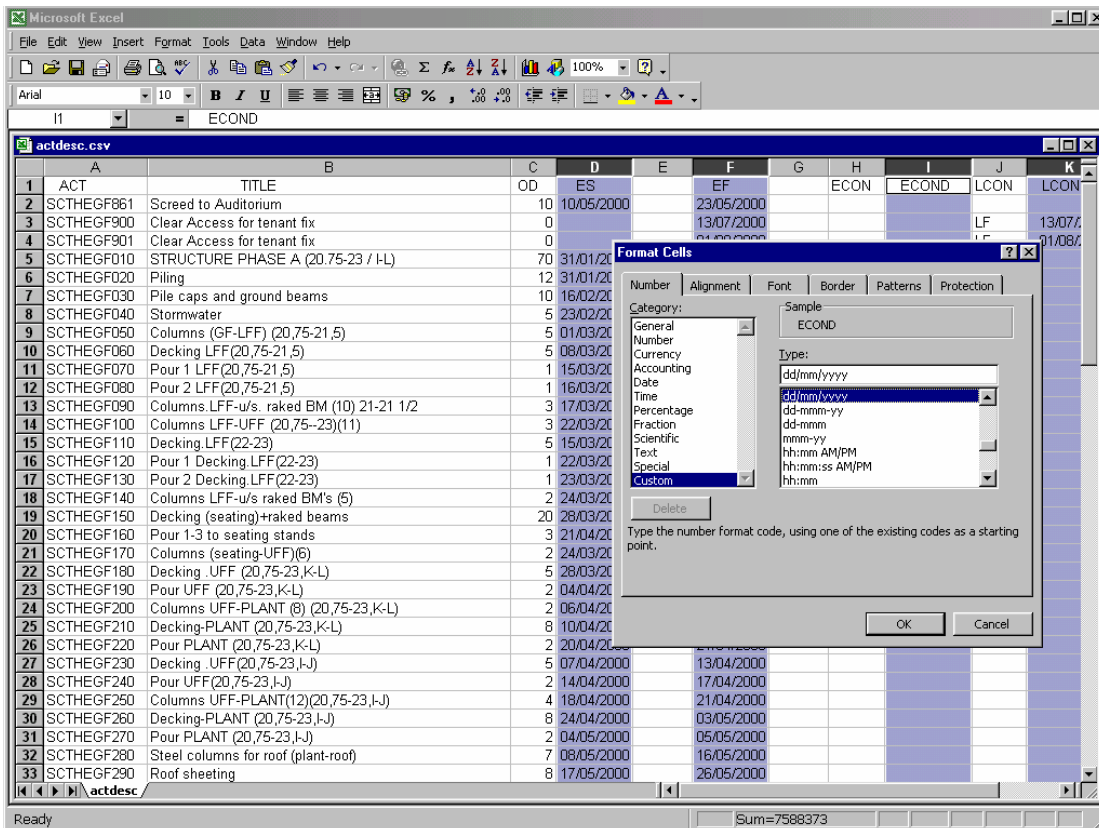
## In Excel

### Use Excel to open the ACTDESC.WK1 file

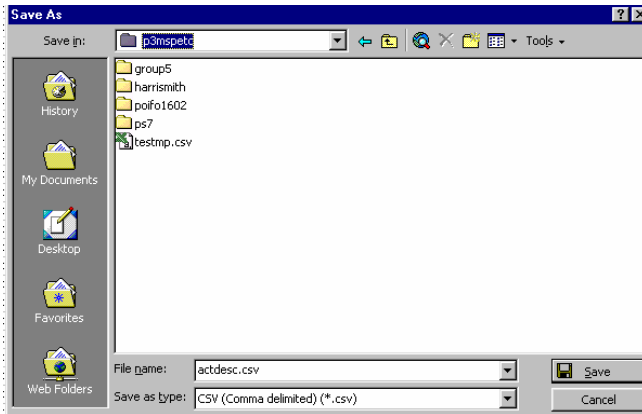
- Remove any extra rows between the top row (column descriptions) and the first activity.
- Change the date format of the project to DD/MM/YYYY.

The separator character for dates is a regional setting: a forward slash, dash or dot is supported. Non-2000 compliant date format DD/MM/YY is supported. 1980 is assumed to be the base date. Dates in the form of 'Tue 31/01/2001 12:30 PM' are supported because the non-date information is ignored. All invalid dates will be set to the start of the program.

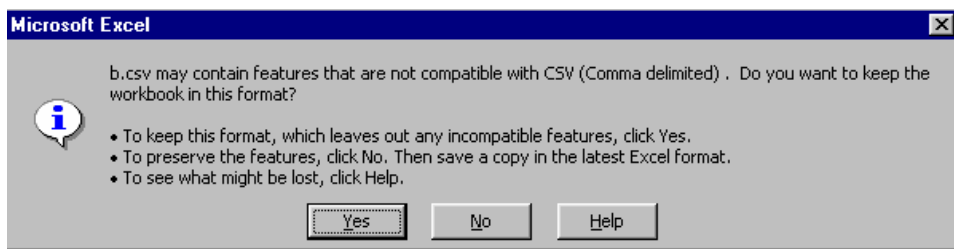
- Select all the date columns (es, as, ef, af, econd, lcond, cond). Use FORMAT CELLS, CUSTOM and choose the date format dd/mm/yyyy.



- Note that the activities can be sorted in Excel. Sorting by Early Start is one option. If any extra columns were exported that describe the order of activities then they can be used.
- Save as a plain comma delimited text file (CSV).



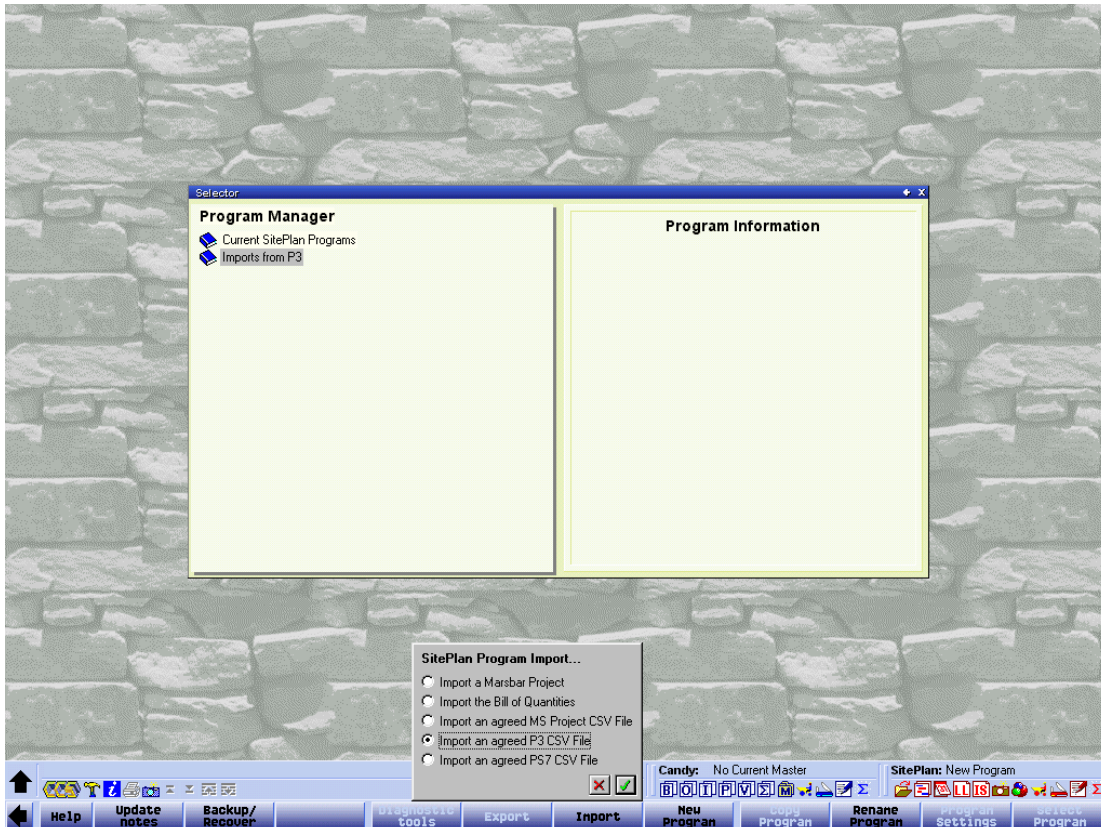
- Answer Yes to this question.



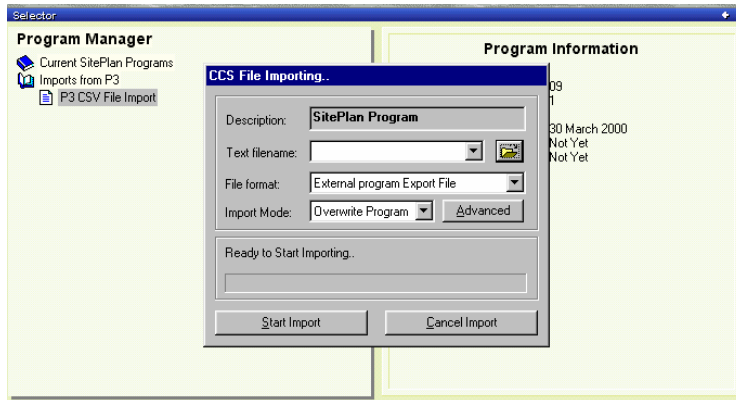
- Use Excel to open the ACTSUC.WK1 file.
- Remove any extra rows between the top row (column descriptions) and the first link.

### 3. In SitePlan

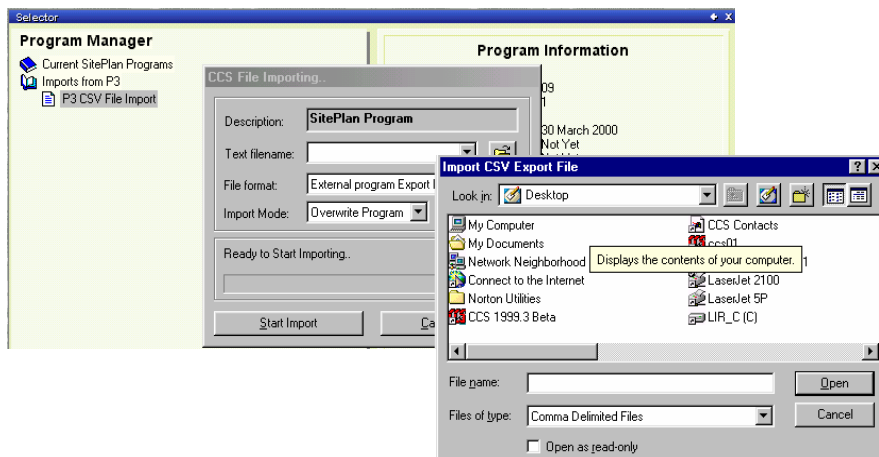
- From the SitePlan Program Manager hit the **IMPORT** SoftKey and choose "Import an agreed P3 file". This menu may look a little different in newer versions of CCS i.e. you may have to choose "Import from another application" first before you get the CSV options.



- Choose a start date. This must be on or before the start date of any activity that will be imported. SitePlan will force any activity that falls before this date to this date.



- Type in or browse for the first file ACTDESC.CSV and hit the start button.



- When that has completed, type in or browse for the second file ACTSUC.CSV and hit the start button.

In SitePlan, the data can be sorted by any column. NOTE that a sort can be made permanent as long as NO header activities exist in the program – this will be the case after a successful import.

If the import is successful, the data can be checked using the "Import Checker" view. Check the following:

Check the start date and calendar.

Check starts and ends.

Check for "b-type" activities – might indicate dropped links or starts\ends not imported.

Check for any activities starting on day 1. This may indicate that SitePlan had a problem with imported dates.

Check for missing milestones or hammock types.

Check the level structure.

Check the logic. Any change made to the logic during the import is written into the Activity Notes column in SitePlan. To see the first note of each activity, set up a view with Activity Note as a column. To view the whole note for an activity double click in the Activity Note column or use the Notes softkey.