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4.04.03 Importing a Project

Using the action “Import project”, project data from a csv file can be imported. The MS Project-Interface from Projectile generates the appropriate csv files using a schema from MS Project files.

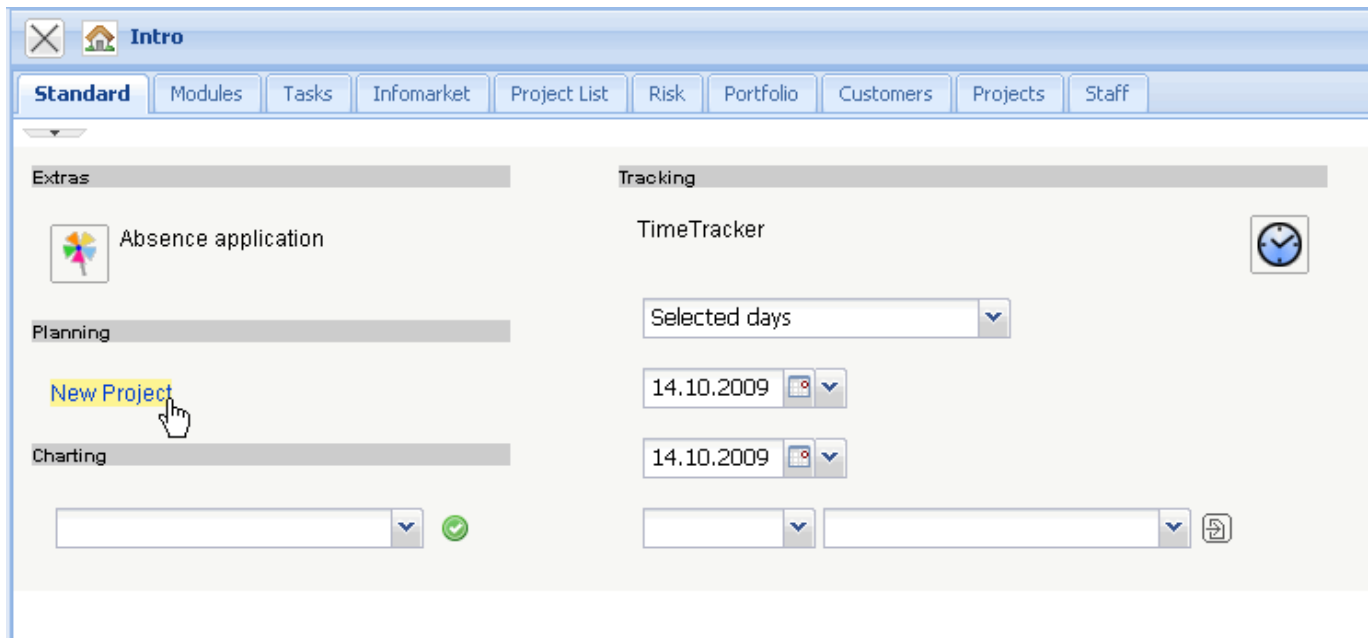
The importing process is performed in two steps: a csv file is generated from MS Project, in which the project data and its sub-projects are included and the csv file is loaded in MS Project using the schema “Projectile”.

The following steps are necessary in order to export a project from MS Project into a csv file. Firstly, the project in MS Project is opened.

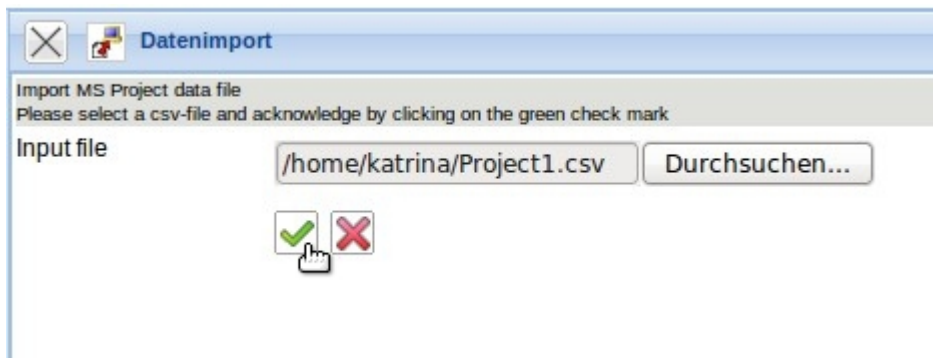
In MS Project the item “file” is selected in the navigation bar and the option “Save as...” is clicked. The file type csv (comma sperated values) (*.csv) is selected. The file can be saved with any selected name and the .csv extension. This file can be saved in any location.

Afterwards, the included schema Projectile from the Projectile_Schema.mpp file is applied (see chapter 4.2.09 Project import and -export with MS Project).

With the following steps the generated csv files can be imported into Projectile. The project assistant is opened firstly by using the functionality “New Project” on intro screen and then the action “import project”.



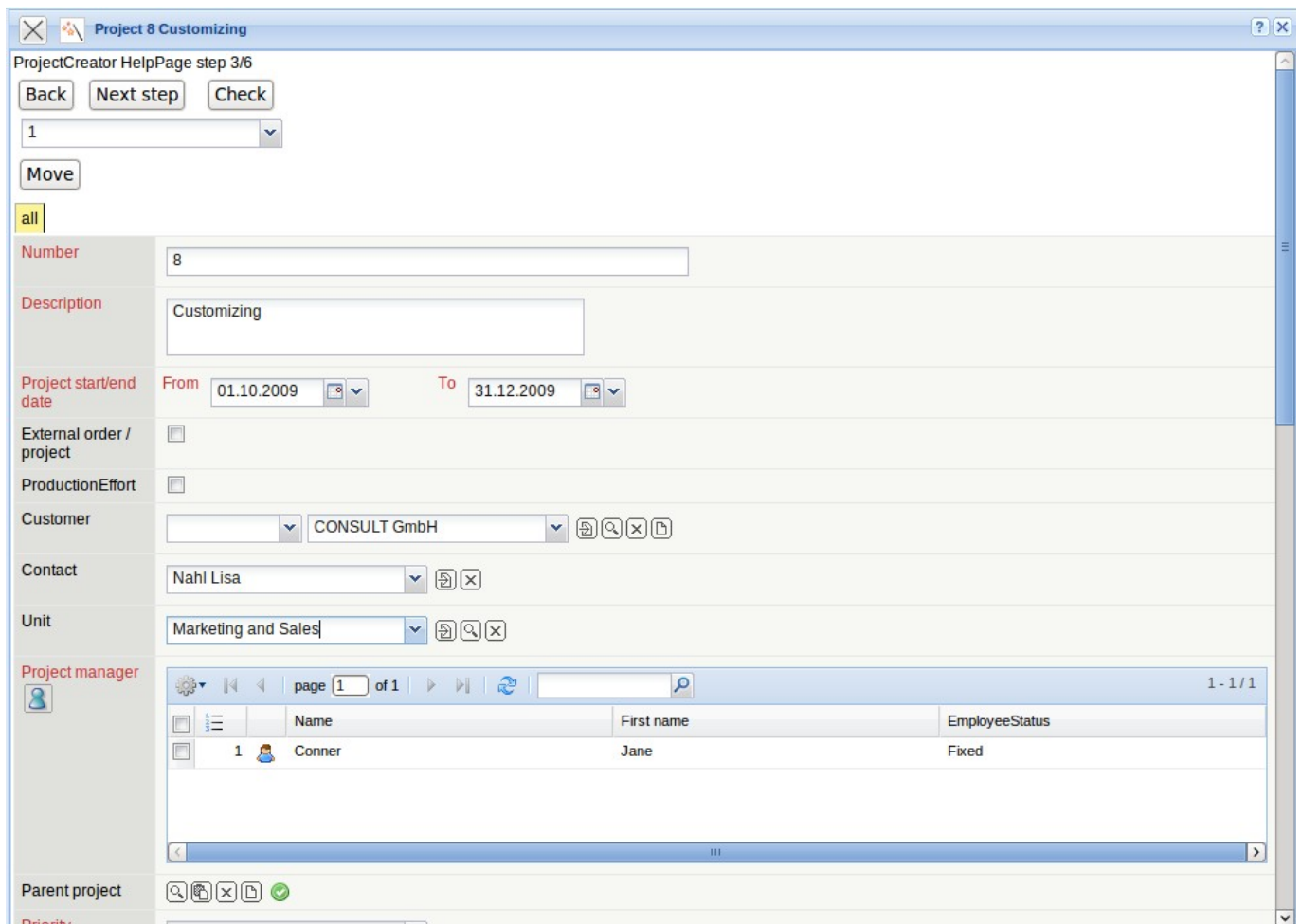
After selecting the option step 2 can be continued. The import file can be selected here. When clicking “search” (“Durchsuchen”) the csv file is selected and ...



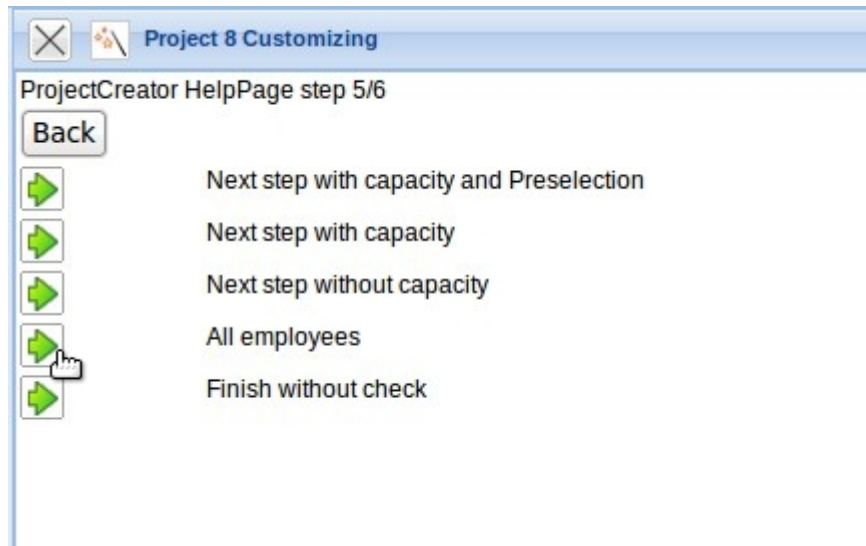
... the selection is confirmed by clicking the green check mark.

In the third step the key figures of the parent project are defined. The data which come from MS Project are saved in the import file and are automatically pre-set.

The remaining project key figures, which are not saved in MS Project, can be completed here (for example the external customer, contact person, unit, project manager and various project attributes):



In the fourth step the jobs of the imported project structure are further specified. These options are important for the templates and for importing MS Project projects with occupations. If the resources are employees, the option "All employees" are selected. If no check or completion should be performed, then the option "Finish without check" can be clicked. This option generates the project directly.



In the last step the jobs for the project are displayed.

Here it is possible to modify the individual key figures of the jobs (employee, effort, occupation).

After clicking the “next” button ...

... the complete project structure is created. Using action “01 - Project shaping” the structure can be displayed and then modified.

Finally, the modifications of the structure and recalculations can be performed.

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