

User manual

Data import from other software

Enterprise Project Management Software



www.ipmp.ir

Data import from other software



In this part, you can import the WBS and the plan from other project control software such as MS Project, Primavera, Microsoft Project Server, etc. into the Ipmp software.

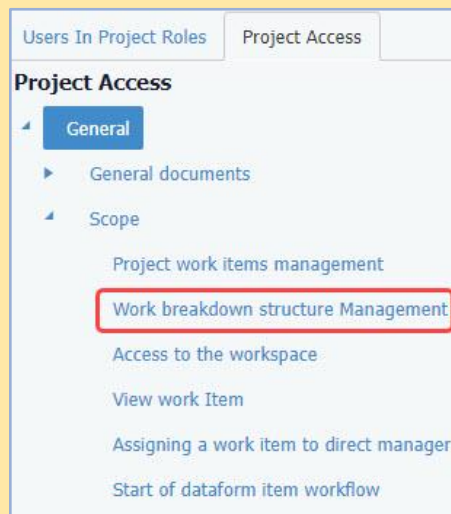


It is worth mentioning that for each project is possible to import (create) an unlimited number of project WBS; In case of importing, (or creating) a new WBS and a new plan, the operations performed on the project, such as the entered progress percentage, the documents recorded on each activity and the progress of the cycles will be preserved and will be no need to redo them from the starting point.

Access



Access to this page is possible for users who are either the project manager or have a role that has given one of the "Project administration" or "Work breakdown structure Management" access from the general access section for that project to them.



Requirements for importing files

The screenshot shows a web interface titled "Data import from other software - project title". At the top right, there is a tab labeled "Active Project" and a dropdown menu showing "project title". Below the title bar, there are four tabs: "Upload", "New WBS", "Final Check", and "Last Step". The "Upload" tab is active. Under the "Upload" tab, there is a section "Select the project file:" with a "Select File" button. Below this, there is a "Notice:" section with a red vertical line on the left. The notice contains seven numbered points:

- 1-Acceptable Formats:
 - Microsoft Project formats: MPP, MPT, MPX, MSPDI
 - Primavera P6 : XER format
 - Primavera P3 : PRX format
 - Planner : XML format
 - SureTrak : STX format
 - Asta Powerproject : PP, MDB formats
 - Phoenix Project Manager : PPX format
 - GanttProject : GAN format
- 2-In order for future connection of Work Items to WBS, use "text1" custom field for Activity Code of Work Items.
- 3-Use custom fields "Number1" in Microsoft Project for task's weights.
- 4-Use "Budgeted Labor" Units in Primavera P6 for task's weights.
- 5-Check your schedule file to avoid duplicate Activity and WBS codes.
- 6-Maximum length of Task's Name in schedule file is 500 characters.
- 7-Task's Name is required.

At the bottom of the notice section, there is a blue button labeled "Next Step".

Fig. 1

As seen in Figure 1, acceptable formats and points to import files into the software are as follows:

1. Acceptable Formats:

- Microsoft Project formats: MPP, MPT, MPX, MSPDI
- Primavera P6: XER format
- Primavera P3: PRX format
- Planner: XML format
- SureTrak: STX format
- Asta Power project: PP, MDB formats
- Phoenix Project Manager: PPX format
- Gantt Project: GAN format

2. In order for future connection of Work Items to WBS, use **“text1”** custom field for Activity Code of Work Items.
3. Use custom fields **“Number1”** in Microsoft Project for activity’s weights.
4. Use “Budgeted Labor” Units in **Primavera P6** for activity’s weights.
5. Check your schedule file to avoid duplicate Activity and WBS codes.
6. Maximum length of activity’s Name in schedule file is **500 characters**.
7. Activity’s Name is required.

File importing

First, select the intended project as the active project.

Active Project

Then, as shown in Figure 2, perform the following steps to import the intended file:

1. Click on to open a window to select the file.

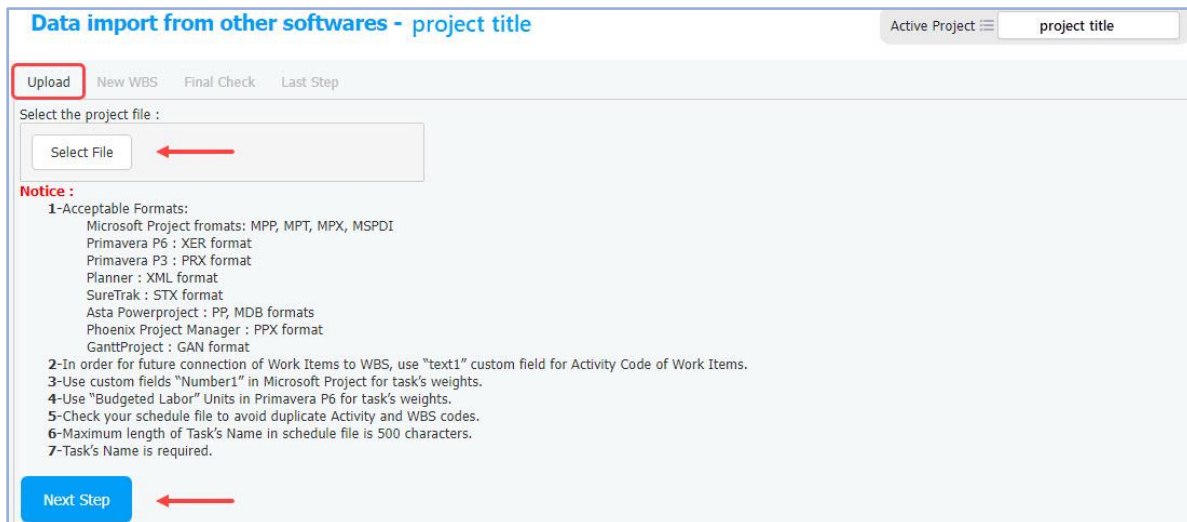


Fig. 2

*At the end of this user manual, it is explained in **the Preparing a file for importing** section how correctly fill columns with information in the MSP file to import to the software.

After selecting the file, the initial import will be done, and this section will be as shown in the following figure.

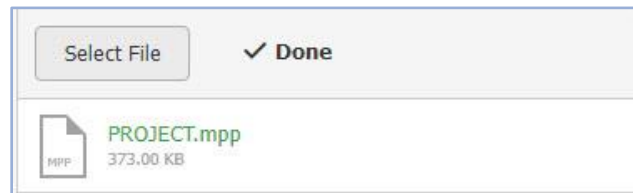
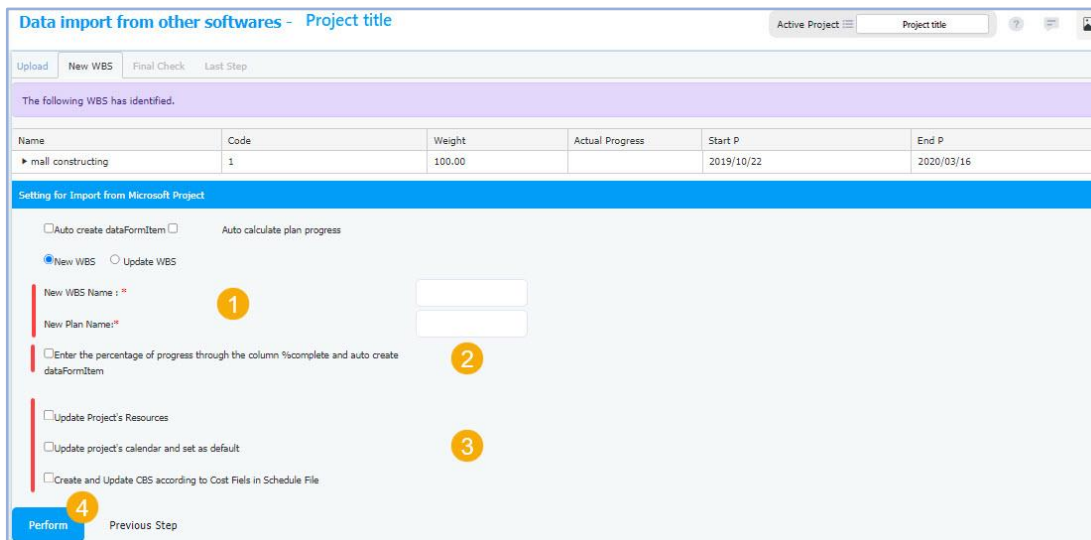


Fig. 3

- Then click on **Next Step** to proceed to the next step. as shown in Figure 4, the new WBS tab will open automatically. But if it is for the second or more times, the WBS tab opens automatically according to Figure 5 (instead of "Create work items and fill out actual progress from %Complete field" in Figure 4, Auto connect Work Items to WBS can be seen).



Data import from other softwares - Project title

Active Project: Project title

Upload | **New WBS** | Final Check | Last Step

The following WBS has identified.

Name	Code	Weight	Actual Progress	Start P	End P
► mall constructing	1	100.00		2019/10/22	2020/03/16

Setting for Import from Microsoft Project

☐ Auto create dataFormItem ☐ Auto calculate plan progress

☒ New WBS ☐ Update WBS

New WBS Name:

New Plan Name:

☐ Enter the percentage of progress through the column %complete and auto create dataFormItem

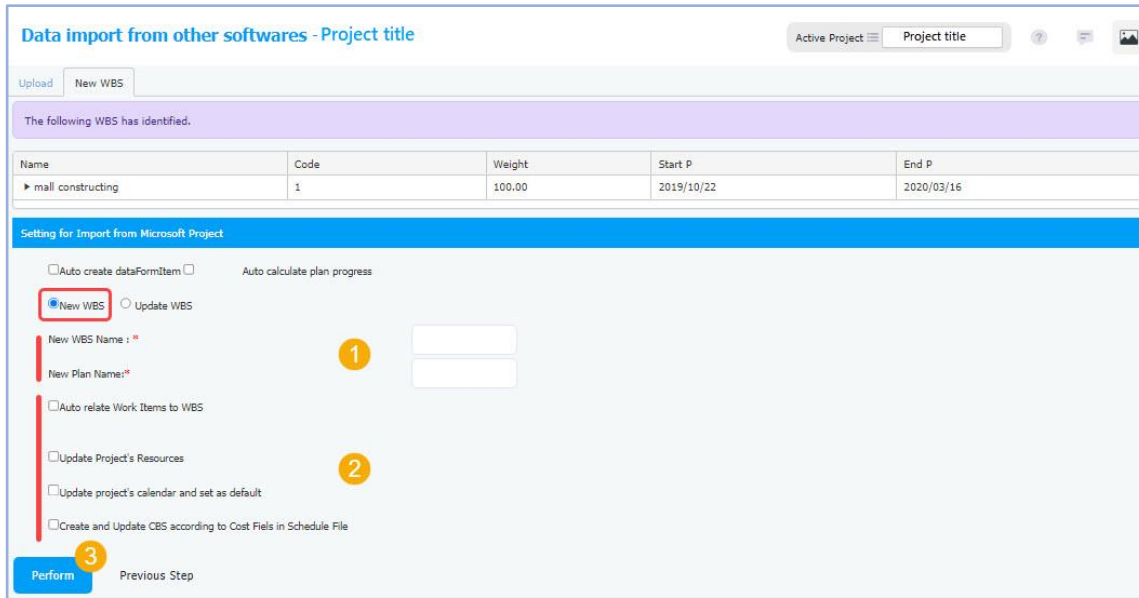
☐ Update Project's Resources

☐ Update project's calendar and set as default

☐ Create and Update CBS according to Cost Fields in Schedule File

Perform | Previous Step

Fig. 4



Data import from other softwares - Project title

Active Project: Project title

Upload New WBS

The following WBS has identified.

Name	Code	Weight	Start P	End P
▶ mall constructing	1	100.00	2019/10/22	2020/03/16

Setting for import from Microsoft Project

☐ Auto create dataFormItem ☐ Auto calculate plan progress

☒ New WBS ☐ Update WBS

New WBS Name: * 1

New Plan Name: *

☐ Auto relate Work Items to WBS

☐ Update Project's Resources 2

☐ Update project's calendar and set as default

☐ Create and Update CBS according to Cost Fiel in Schedule File

3 **Perform** Previous Step

Fig. 5

The first options in the settings include auto-create work item and auto calculate plan progress:

Auto-create work item

Enable this option to create work items automatically.

Auto-create plan progress

Enable this option to create plan progress automatically (by enabling this option, auto-create work items will also be enabled automatically).

There are two options to add the imported file to the project:

Create a new WBS

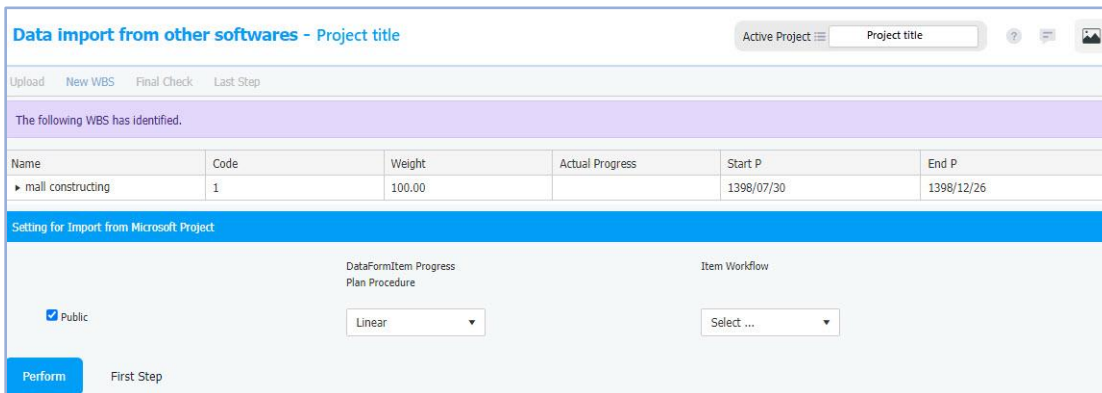
This option is used in 2 modes:

A. Import the WBS for the first time

In this situation, follow the following steps:

1. Enter the new WBS and plan name in the corresponding fields (number 1 in Figure 4).
2. This option is only visible when importing WBS for the first time for the project, enable this option to auto-create work items and to fill out actual progress from the %complete field.
3. If the imported WBS contains a calendar, resource, or cost breakdown structure (CBS), select the corresponding options to import them at the same time.
4. Click on  to proceed to next step.

As shown in Figure 6, a new tab with the title of import setting will open, in this tab, activate this option (next to the general work item) to select the progress plan procedure and the work item workflow from the menus (this step is optional).



The screenshot shows a web application interface for importing WBS data. The title bar reads "Data import from other softwares - Project title". Below the title bar, there are tabs: "Upload", "New WBS" (active), "Final Check", and "Last Step". A message states "The following WBS has identified." followed by a table:

Name	Code	Weight	Actual Progress	Start P	End P
► mall constructing	1	100.00		1398/07/30	1398/12/26

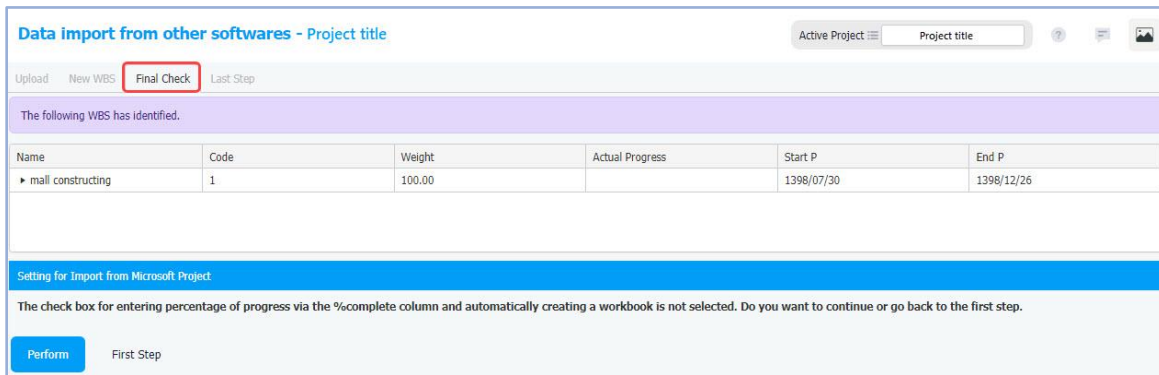
Below the table, there is a section titled "Setting for Import from Microsoft Project" with a blue header. It contains three main settings:

- ☒ Public
- DataFormItem Progress Plan Procedure: Linear (dropdown menu)
- Item Workflow: Select ... (dropdown menu)

At the bottom left, there is a "Perform" button and the text "First Step".

Fig. 6

Click on  to import WBS and enter the final check, as shown in Figure 7, the software will give the last message, if necessary, go back to the first step and edit the settings.



Data import from other softwares - Project title

Active Project: ?

Upload New WBS **Final Check** Last Step

The following WBS has identified.

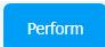
Name	Code	Weight	Actual Progress	Start P	End P
► mall constructing	1	100.00		1398/07/30	1398/12/26

Setting for Import from Microsoft Project

The check box for entering percentage of progress via the %complete column and automatically creating a workbook is not selected. Do you want to continue or go back to the first step.

 First Step

Fig. 7

Finally, click on  to finalize importing the file, and as seen in Figure 9, the imported WBS and plan are set as the default.

Importing new WBS for the project

In this situation, the project has a WBS and a plan, and it is necessary to import a new WBS and plan for it (for example when WBS or plan needs to be updated); For this purpose, follow the following steps:

1. Enter the name of **the new WBS and the plan** in the corresponding fields (number 1 in Figure 5).
2. If the imported WBS has a **calendar, resources, or cost breakdown structure (CBS)**, select the corresponding options to update them at the same time.
3. Activate this option to **connect** the work items to the new WBS (because the project progress information recorded on the work items).

***Don't** activate this option if there is no need to connect work items and WBS.

*By activating this option, the following methods will be displayed (Figure 8), by choosing each of these methods, connection between the imported WBS and the work items will be established.

*The numbers written in front of each method represent how well the new imported WBS connects with the work items.

	Number of Errors	Probability of Success	Number of Items Can Cover
☒ Based on Task GUID	0	0%	0
☐ Based on parent path	-	0%	0
☐ Based on WBS code of Work Items	0	100%	82
☐ Based on Activity Code of Work Items	95	0%	0
☐ Based on Activity Code of Work Items	95	0%	0

Fig. 8

The higher the "probability of success" and "coverable work items", the more accurate and complete the connection between the activities of the new WBS and the work items will be.

Each of the methods is described below:

- **Based on activity GUID:** in MS Project software, each activity has codes (both activities and levels of WBS). These codes can be seen in the GUID column. In the Ipmp software, it is possible to connect the existing work items to the new WBS based on this code. It should be noted that this method is the most accurate method for connection. It is possible to use this facility in one of the following ways:

1. Updating the initial file: In this case, the previously imported WBS is updated and reimported in the Ipmp software.
2. exporting from the Ipmp software, updating and reimport it: In this method, first export WBS from the Ipmp software and edit intended items in the MS project 2019, then reimport the file in the Ipmp software.

*If the exported file is opened by other versions of the MSP software, the codes will be regenerated and will not match the information in the Ipmp software.

- **Based on the parent path:** with this option, if the WBS levels titles are the same as the default WBS, it assigns work items to its activities in order based on the name of each level.

If the titles of the WBS levels do not match with the default WBS, connection will not be established; and existing work items will be considered as free items; which can be manually assigned to activities.

(How to manually assign work items to activities is described in the workspace user manual).

-Based on WBS code of Work Items: by activating this option, if unique codes have defined for each level and its sub-branch activities, each work item will be assigned based on the code Similarity to its corresponding activity.

*These codes are the same codes inserted in the WBS column in MS Project software, which can be defined **manually** in IPMP software.

-Based on Activity Code of Work Items: This option uses the information in the Activity Code column in the Primavera software. Its operation resembles the "Based on WBS code of Work Items".

select the intended item and click on  to finalize the loading process.

* As can be seen in Figure 9, the imported WBS and plan are set as the default.

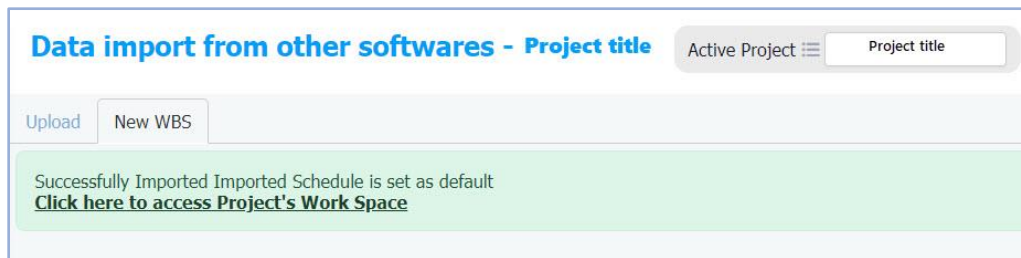


Fig. 9

B. Update WBS

This possibility is used if it is necessary to change the plan of one of the previous WBS of the project, in this situation, this has not been changed in the imported file, only the plan has been updated.

The screenshot shows the 'Import Setting' window. It contains several options: 'Auto Create Work Item' (unchecked), 'Auto calculate plan progress' (unchecked), 'New WBS' (unselected), and 'Update WBS' (selected and highlighted with a red box). Below these, there is a 'Project WBS' dropdown menu currently showing 'Please Select' (labeled with a yellow circle 1). Underneath, there are two radio buttons: 'Based on WBS Code' (selected, labeled with a yellow circle 2) and 'Based on activity Code' (unselected). At the bottom, there is a 'New Plan Name' text input field (labeled with a yellow circle 3). Navigation buttons 'Previous Step' and 'Next Step' are located at the bottom left.

Fig. 10

Update the plan of the existing WBS in the following steps:

1. Select the intended WBS from the available list.
2. Select how to connect the new plan to the selected WBS.

As you can see, there are two ways to connect:

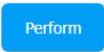
2-1. **Based on WBS code:** In this method, the new plan (imported file) based on the WBS code of the activities is connected to the WBS selected in step 1.

*These codes are the ones that inserted in the WBS column in MS Project software, which can be defined manually in the IPMP software.

2-2. **Based on activity code:** this method works similarly to the "based on WBS code " with the difference that it is used for imported files from Primavera software.

*This option uses the information in the Activity Code field in Primavera software.

3. Enter the name of the new plan in this field.

Then click on  to complete the loading process and connecting the new plan, after all a page as shown in Figure 9 will open.

* As can be seen in Figure 9, the imported WBS and plan are set as the default.

Points

After importing the WBS and plan:

* As mentioned earlier, **in all import methods**, the imported WBS and plan are automatically set as the default. It is possible to change the default settings manually on the project information page.

* **In all conditions of WBS import** (for the first time or again), it is necessary to recalculate the method of calculating plan progress on the calculate project page (how to do it is described in the corresponding user manual).

*For importing, first the following actions should be taken, then recalculation should be done.

Also, for importing WBS and rescheduling the project, it is necessary to do the following according to the conditions:

Add activities

* It is necessary to define work items for new activities on the workspace page. (how to do it is described in the corresponding user manual).

* Then on the calculate project page, top-down weighting should be done. (how to do it is described in the corresponding user manual).

Delete activities (compared to the previous WBS)

- * In this situation, several free work items will be created, if it is necessary connect the work items to the new WBS manually on the workspace page.
- * If free work items connect to other activities, top-down weighting should be done on the calculate project page.

Change WBS completely

This situation is similar to importing WBS for the first time. All work items that connected to the previous WBS will be considered free for the new WBS.

- * It is not recommended to change the WBS of the project completely and it is better to define another project.

Change the project plan

If the plan of the existing WBS changed (mode B), after completing import, it is necessary to recalculate the method of calculating plan progress on the calculate project page. (how to do it is described in the corresponding user manual).

Prepare the file for importing

If it is necessary to import some information including actual start and end dates of activities, volumes, or other items to the Ipmp software, enter this information in the MSP software before importing.

Title	Field name in MSP	Acceptable format
Weight	Number 1	The weights sum should be 100.
ID	Number 2	Be unique.
Actual progress	Number 3	Between 0 and 100.
Activity code	Text 1	Be unique.
Amount of mass	Number 10	–
Volume unit	Text 10	Acceptable unit types are listed in the following table.

The volume unit includes the items in the following table:

Unit name	Unit symbol	Unit name	Unit symbol	Unit name	Unit symbol	Unit name	Unit symbol
Meter	m	second	Sec	Rial	IRR	Celsius	C
kilometer	Km	minute	Min	Dollar	USD	Amp	Amp
Square meters	Sq. M	Hour	HOR	Euro	EUR	Mol	Mol
cubic meter	Cu M	Day	Day	Number	Num	Candela	Cd
kilogram	Kg	Week	WEEK	Unit	U	Liter	Ltr
Ton	Ton	Month	MO	Set	Set	Piece	Pcs