

Technical Documentation

Reference : Plugin – Import MS Project

Version : V1.0

Plug-in Import Project

Introduction

This is the first version of this plug-in, it is possible that all use cases are not taken into account. Do not hesitate to submit any unexpected behaviour on our forum.

The objective of this document is to explain how to use the plug-in "Import Project". With this plug-in you can:

- ⇒ Import data from MS-Project files in XML format.
This will create new project from MS-Project file.

Global structure of the plug-in

When the plug-in is installed, you get a new button, to access "Import Project" screen in section "tools":



The access to the screen is managed like all other screens, through the "Access to forms" page. When plug-in is installed, only Admin profile is granted to access "Import Project" screen so you have to configure access rights for other profiles corresponding to your needs.

The plug-in screen is divided in two parts:

1 File selection area



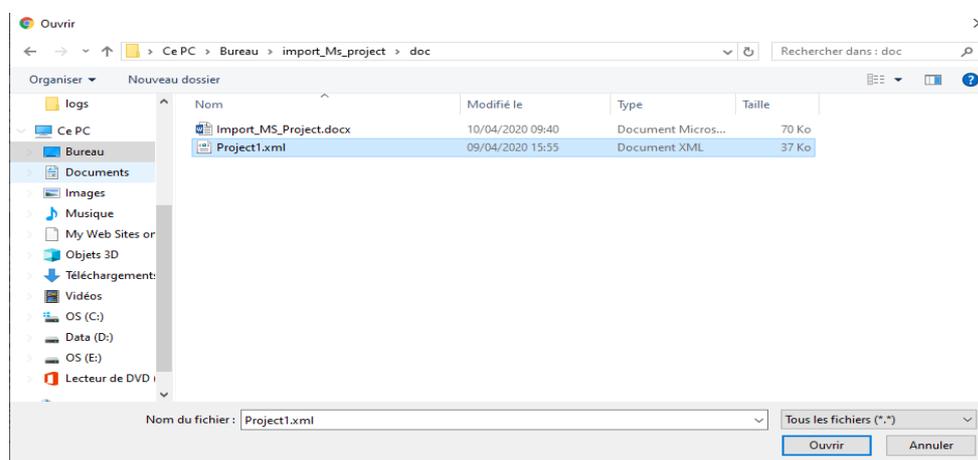
Import Project

file (Select an XML file from MS-Project export)

Allow to search and fetch the file to import

You have to select file in XML format.

MS-Project MPP format is proprietary, so you have to save your project in XML format in MS-Project in order to import it.



Here is an example of what the beginning of expected XML project file looks like.

```
<?xml version="1.0"?>
- <Project xmlns="http://schemas.microsoft.com/project">
  <Name>Project1.xml</Name>
  <Company>Microsoft</Company>
  <Author>gautier</Author>
  <CreationDate>2020-04-09T15:47:00</CreationDate>
  <LastSaved>2020-04-09T15:55:00</LastSaved>
  <ScheduleFromStart>1</ScheduleFromStart>
  <StartDate>2020-04-09T09:00:00</StartDate>
  <FinishDate>2020-05-11T18:00:00</FinishDate>
  <FYStartDate>1</FYStartDate>
  <CriticalSlackLimit>0</CriticalSlackLimit>
  <CurrencyDigits>2</CurrencyDigits>
  <CurrencySymbol>€</CurrencySymbol>
  <CurrencySymbolPosition>3</CurrencySymbolPosition>
  <CalendarUID>1</CalendarUID>
  <DefaultStartTime>09:00:00</DefaultStartTime>
  <DefaultFinishTime>18:00:00</DefaultFinishTime>
  <MinutesPerDay>420</MinutesPerDay>
  <MinutesPerWeek>2100</MinutesPerWeek>
```

2 The Data-preview to present data that will be imported in ProjeQtOr.

This appears after uploading the XML file.

project name :

Type of project :

description :

import real work :

name of resource in file	name of resource in ProjeQtOr	create resource	calendar	function	default profile
Project leader	<input type="text" value="Project leader"/>	<input type="checkbox"/>			
Developer 1	<input type="text" value="Developer 1"/>	<input type="checkbox"/>			
Developer 2	<input type="text" value="Developer 2"/>	<input type="checkbox"/>			

name	resources	activity type	planning mode	assigned	priority	predecessor
Analysis	Project leader	<input type="text" value="Task"/>	<input type="text" value="as soon as possible"/>	4,38 d	500	
Development	Developer 1, Developer 2	<input type="text" value="Task"/>	<input type="text" value="as soon as possible"/>	26,25 d	500	#1-Analysis
Tests	Developer 1	<input type="text" value="Task"/>	<input type="text" value="as soon as possible"/>	2,63 d	500	#2-Development
Delivery		<input type="text" value="Deliverable"/>	<input type="text" value="floating milestone"/>	0 d		#3-Tests

Management of data preview

This preview presents data that will be imported into ProjeQtOr. Here you can manage compatibility between ProjeQtOr references and data from MS-Project file. To create a project best fitting your need, you have to fulfil the information required for import. By default, the plugin tries to find the data from the file, but you can change this before the import. Of course, it will also be possible to modify data in ProjeQtOr after the creation of the project.

Project description

project name :
 Type of project :
 description :
 import real work :

The **project name** is required. It is by default the name of the xml file.

Type of project is required. By default, it is first of the list.

Description of the project may be required for some project type, depending on your configuration. Be sure to respect the constraint to avoid failure in Project creation.

The plug-in gives the possibility to **import real work** of resources if your file contains progress information. This can be helpful to initialize you ProjeQtOr instance and retrieve history of progress on your ongoing projects previously managed through MS-Project. But take care that it may be very dangerous to import real work in ProjeQtOr. It is very hard to remove items with real work in ProjeQtOr. For this reason, this option is not checked by default.

Resources table

name of resource in file	name of resource in ProjeQtOr	create resource	calendar	function	default profile
Project leader	<input type="text" value="Project leader"/>	<input type="checkbox"/>			
Developer 1	<input type="text" value=""/>	<input checked="" type="checkbox"/>	80%, out on wednesday	Manager	Project Guest
Developer 2	<input type="text" value="analyst A"/>	<input type="checkbox"/>			

Before importing the file, you must match Resources identified in the imported file. These resources can be either created as new resources, or selected from existing resources in your instance of ProjeQtOr.

During the file analysis, the plugin tries to match the resources with existing ones.

If the name of the resource in the XML file is equal to the name of an existing resource in ProjeQtOr, this resource is selected by default (first case on screenshot).

If this is not the expected result, you can modify this selection (last case on screenshot) or choose to create a new resource.

If no corresponding resource is found in ProjeQtOr, a new resource will be created (second case on screenshot). You have to choose its calendar, its default function and its profile (these fields are mandatory for creating the resource). Default value for function is the first item in the list and default value for profile is the last in the list (the one with fewer access rights, guest in standard configuration).



Hint: If your default profile does not automatically gives you access to the newly created project, you will be automatically allocated with Project Leader profile to the new project to be able to manage it.

Tasks table

name	resources	activity type	planning mode	assigned	priority	predecessor
Analysis	Project leader	Task	as soon as possible	4,38 d	500	
Development	Developer 1, Developer 2	Task	as soon as possible	26,25 d	500	#1-Analysis
Tests	Developer 1	Task	as soon as possible	2,63 d	500	#2-Development
Delivery		Deliverable	floating milestone	0 d		#3-Tests

This table displays all tasks and milestones found in the imported file.

You will be able to validate imported structure of the new project before validation of the import.

ProjeQtOr and MS-Project have very different ways to calculate planning. The notions of ProjeQtOr “planning mode” and “activity type” have no match in MS-Project fields.

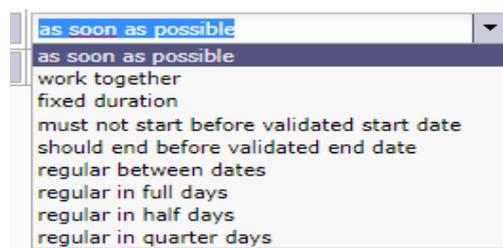
By default the “activity type” of each task is the first in the list.

During the file analysis, the plugin tries to guess the best “planning mode” from data in the file. But this may not always be very accurate.

That is why it may be necessary to manually select the most accurate “planning mode” for every activity.



Hint: You won't be able to select “recurring” planning mode, as this mode requires extra definition to get a planning calculation.



Import data

When the preview data is as you expect, click on button “Import data” to create the new project.

Import Data



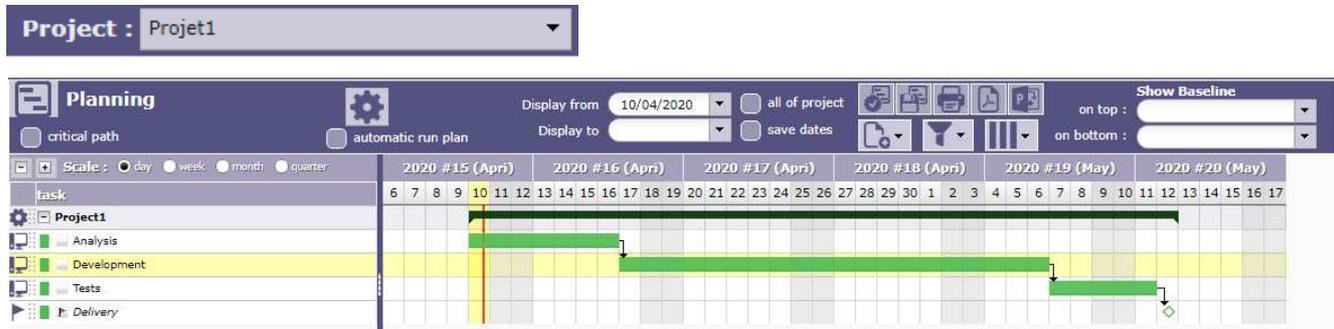
Hint: This button is at the bottom of the list of activities, so you may have to scroll to see it.

Green message of correct saving is displayed to confirm the creation of each element in ProjeQtOr. You may get blocking control messages depending on constraints defined in ProjeQtOr (mandatory fields, real work defined on validated week or else) that forbid creation of items.

```
Project #40 inserted
Resource #61 inserted
Allocation #104 inserted
Resource #62 inserted
Allocation #105 inserted
Resource #63 inserted
Allocation #106 inserted
Activity #295 inserted
Activity #296 inserted
Activity #297 inserted
Milestone #4 inserted
Assignment #248 inserted
Assignment #249 inserted
Assignment #250 inserted
Assignment #251 inserted
Dependency link #151 inserted
Dependency link #152 inserted
Dependency link #153 inserted
```

Now you can check your new imported project in the planning view. Click on below button to directly select new project in Project Selector and go to planning view.

View imported project



You can now manage your new project in ProjeQtOr.



Hints: ProjeQtOr and MS-Project have very different ways to calculate the planning. So the duration of tasks can be different in both tools.

Tasks imported that are not completed (some left work to do) will require new calculation of planning in ProjeQtOr to be correctly planned.

Tasks imported with real work that are not completed may present some strange display before new calculation.



Very important

This feature must be used only to import new projects in ProjeQtOr.

Do not try to export exiting project in ProjeQtOr to MS-Project format, open exported file in MS-Project, make some changes in MS-Project, save updated project to XML format and re-import file to ProjeQtOr. This would create new project and will not update existing one.