

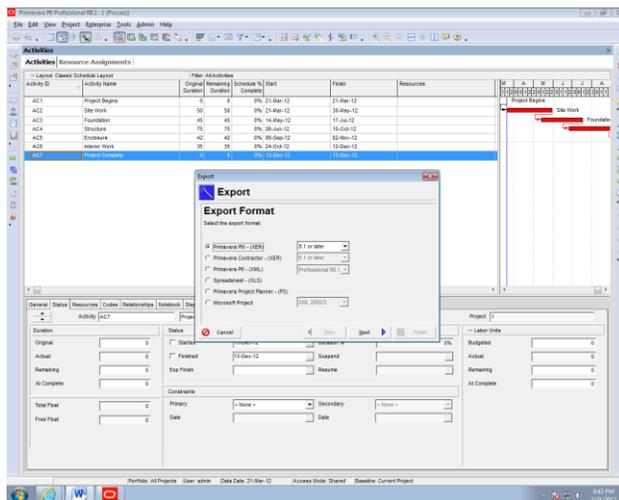
Exporting/Importing an Excel Spreadsheet to Primavera

Not every company on a project has Primavera scheduling software, so in order to get status updates on schedule, importing and exporting Excel spreadsheets becomes extremely important. There is always the possibility to call up each contractor and get the updated information but this is a very inefficient process. By exporting from Primavera to Excel, the file can be easily emailed adjusted under specific instruction and returned. Assuming the instructions for updating the spreadsheet were followed it is very easy to import the spreadsheet back into the Primavera Project file.

Process:

Exporting

1. With your Primavera file open, go to the “File” and click “Export”
2. Figure 1 screen should appear, and you will then select “ Spreadsheet – (XLS)”, then click the next arrow



3. Make sure the “activities” box has been checked, then click the next arrow
4. On the next screen titled “Projects To Export” check the box of your project, then click the next arrow
5. This next step will be what the portion that you want to export to Excel. Click the “Add” button and a box will appear (See Figure 2)
6. Create a name for the Template and then choose the options that you would like to include in the Excel file and move them so that they are in the column, “Selected Options” and

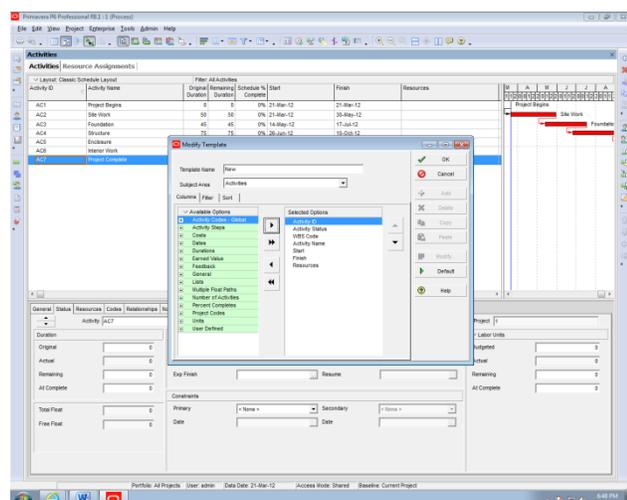


Figure 2

- click “OK”, then click the “Next” arrow
- Designate a file name where the file will be saved too. Then click the “Next” arrow, and once the Summary box appears click “Finish”
 - If everything went as planned, it will say “Export Successful” and click Okay

Rules for Updating Excel Schedule

If these rules are not followed importing back into Primavera will not work after the update in Excel.

- Do not change the...
 - WBS Code
 - Activity Status Column
 - Name of two worksheets
 - The USERDATA worksheet information
- Inputting Dates into the Excel File
 - When inputting adjustments to the Start Date or End Date Column, you cannot just place a date in the cell
 - A certain format must be maintained which is as followed. (Example: '12/13/2012 8:00:00 AM)
 - First a comma must be included at the beginning
 - Followed by month/day/year
 - Then a space then, 8:00:00 AM or the desired time

Importing

- With your Primavera open, go to the “File” and click “Import” (See Figure 3)

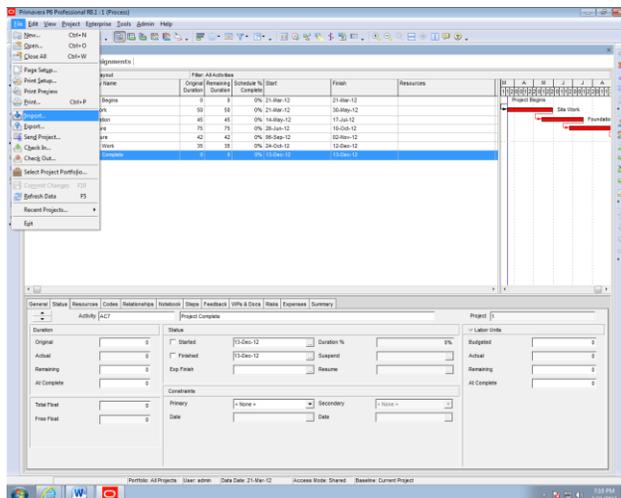


Figure 3

- A screen will appear, titled “Import Format”, choose “Spreadsheet – (XLS)” , then click the next arrow

3. Then select where your Excel File has been saved to on your computer, double click, , then click the next arrow
4. Make sure the “activities” box has been checked, then click the next arrow
5. A screen titled “Import Project Options” will appear (See Figure 4) and you will want to click in the cell directly under “Import To”

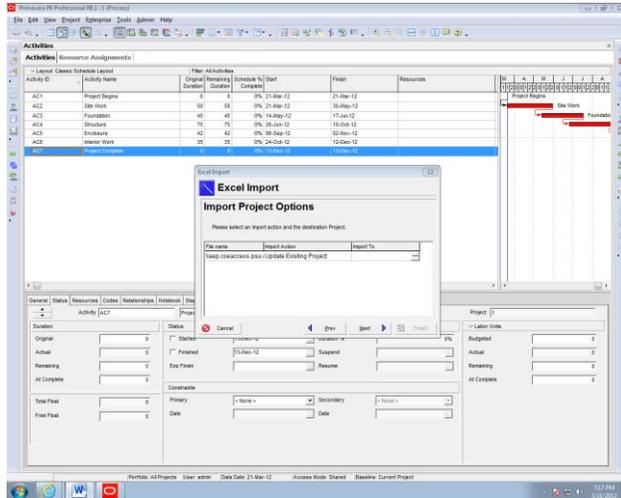


Figure 4

6. Double click on the specific Project ID or Project Name that was used previously in Primavera prior to the Excel update, then click the next arrow
7. The Summary box appears click “Finish”
8. If everything went as planned, it will say “Import Successful” and click Okay

Lessons Learned:

Importing and exporting to an Excel spreadsheet, makes adjustment to the Primavera very easy. Everything works very well from one format to the other until you change columns or rows that are not supposed to be adjusted. When we made adjustments to the wrong columns we had to redo all of the work we previously did in order to upload the Excel file back into Primavera. This was also the case in another circumstance. In Excel each cell must be in the specific text format used by the Primavera program. If the wrong format is used importing back to Primavera will not work. As long as you pay attention to the proper format and only adjust the cells that are supposed to be changed, the process is very simple.