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USING P3 VERSION 3.1

IMPORT AND EXPORT FUNCTIONS

WITH THE

DBF FILE FORMAT

AND

EXCEL

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1 INTRODUCTION

P3 Export function will operate with four file formats:

- *.PRN – ASCII
- *.DBF – dBASE III/IV
- *.WK1 – Lotus 123
- *.WSK – Lotus 123

P3 Import function operates with three file formats:

- *.DBF – dBASE III/IV
- *.WK1 – Lotus 123
- *.WSK – Lotus 123

When Importing it is often easier to work with the DBF format which may be opened with Excel because:

- Header data is not imported as activities
- Only one area of the spread sheet has to have a named range whereas with Lotus Format each column of data has to be named.

Note: The Author has experienced difficulty when importing Constraint Dates with this format.

2 SUMMARY OF THE PROCESS

To import data it is suggested that the following process is used:

- If you have a blank project then create and a few activities in P3 which have similar data to the data required to be imported.
- Export the data in DBF format.
- Open the exported DBF file in Excel.
- Delete any data columns in the spreadsheet that will not be imported into P3.
- Save the file in Excel format. This may be used as a template at a later date.
- Populate the fields in the spreadsheet with data to be imported.
- Add any new data items to P3 such as Activity Codes, Activity ID Codes, Resources, Calendars, Cost Accounts and Cash Flow Curves.
- Edit the Named Range “DATABASE” to include only the data to be imported.
- Save as an Excel file because saving as a DBF file will not save formulae or formatting or multiple sheets.
- Save as a DBF file and close the file. The DBF file will be imported.
- Open the DBF file and check your data and close the file.
- Open P3 and open the file that the data is to be imported into.
- Backup your project file.

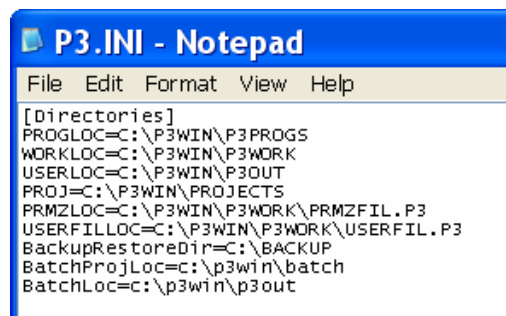
- Use the P3 **T**ools, **P**roject **U**tilities, **I**mport function to import the data in DBF format.
- Check the Import Log.
- Run a suitable filter and layout, then check the imported data.

3 CREATE THE EXPORT FILE

3.1 Location of Exported files

The P3.INI file is kept in the Windows or Winnt directory:

- Open the P3.INI by right clicking on it and selecting **OPEN**:



```
[Directories]
PROGLLOC=C:\P3WIN\P3PROGS
WORKLOC=C:\P3WIN\P3WORK
USERLOC=C:\P3WIN\P3OUT
PROJ=C:\P3WIN\PROJECTS
PRMZLOC=C:\P3WIN\P3WORK\PRMZFIL.P3
USERFILLOC=C:\P3WIN\P3WORK\USERFIL.P3
BackupRestoreDir=C:\BACKUP
BatchProjLoc=c:\p3win\batch
BatchLoc=c:\p3win\p3out
```


- The location of the Exported files is specified in the **USERLOC** line and may be edited here.

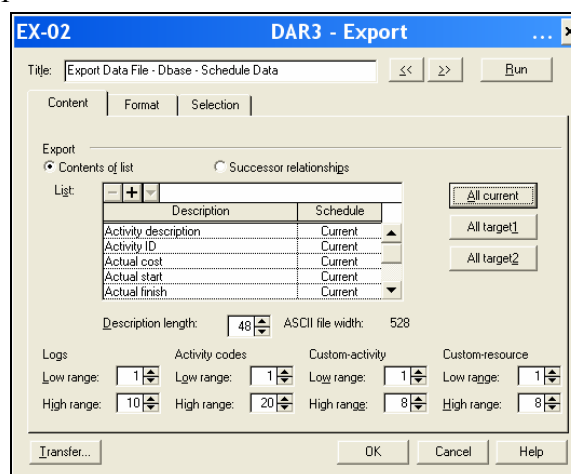
3.2 Create and a Few Activities in P3

It is important to create a small amount of data in P3 so that the fields may be simply recognised in Excel when the exported DBF file is opened with Excel. This may include Activity Codes, Custom Data Items and Resources.

3.3 Export the Data in DBF Format

Use the P3 **T**ools, **P**roject **U**tilities, **E**xport function to export the data in DBF format.

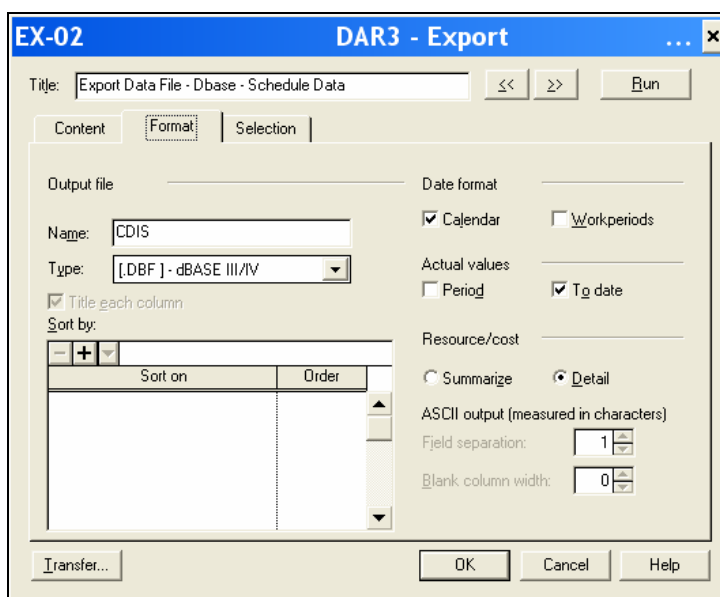
- Select the EX-02 - Export Data File - Dbase - Schedule Data or use  to create a new Export routine.

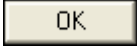



- **Transfer...** allows the importation of an Export routine from another project.
- Assign a title,



- Select **Contents of list** to export Activity data or **Successor relationships** to export the relationships.
- Select **All current** to Export all Fields from the Current schedule
- Add and remove data fields from the **List** as required.
- Ensure the **Description length** is increased to 48 otherwise the Activity descriptions will be truncated.
- Ensure the range of the **Logs**, **Activity Codes**, **Custom-activity** (Activity Custom data Items – CDIs) and **Custom-resource** are adjusted as required.
- Click on the **Format** tab:



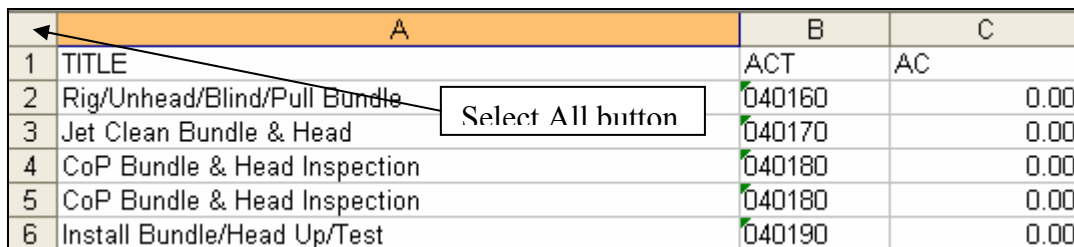
- Enter the **Name:** of the file to be exported, 8 characters without spaces.
- Select the **FILE Type:** as [.DBF] – dBASE III/IV.
- Usually the **Date format** of **Calendar** is selected and **Actual values**.
- **Resource/cost** should be **Detail**.
- Click on the **Selection** tab to filter on a criteria for selecting the activities to export.
- Click on  to save this Export.
- Click on  to export the data...
- Check to Log to ensure all the data is exported.

4 CREATING THE DATA IN EXCEL

4.1 Open the Exported DBF File in Excel

The file may be opened from by:

- Opening Excel, selecting the **File, Open** command, selecting the dBASE Files(*.dbf) format, or
- Finding the file using Explorer, right clicking on the file in the C:\P3WIN\P3OUT directory, select **OPEN** and selecting Excel from the list of applications.
- You may also select **Tools, Folder Options..., File Type** tab from Explorer and select Excel as the default application to open a DBF file.
- Your data will look like the picture below.



	A	B	C
1	TITLE	ACT	AC
2	Rig/Unhead/Blind/Pull Bundle	040160	0.00
3	Jet Clean Bundle & Head	040170	0.00
4	CoP Bundle & Head Inspection	040180	0.00
5	CoP Bundle & Head Inspection	040180	0.00
6	Install Bundle/Head Up/Test	040190	0.00

- The top line of the spreadsheet are the P3 field names. The “P330batch.pdf” manual on the P3 Installation disk will explain each of these fields in detail. Exporting known data is the often simplest way of identifying difficult field names.

4.2 Delete Redundant Data Columns

To make it simpler to work on the spread sheet:

- Click on cell C2 and then select **Window, Freeze Panes**.
- Then click on the **Select All** button, the space left and above cell A1 and double click on the column width to open up all the columns.

NOTE: It is important that you do not close the width of any column as this will truncate data when it is save as a DBF file.

4.3 Save the File in Excel Format

When a spreadsheet is saved in **DBF** format from Excel, the formulae, formatting and data outside the Named Range **DATABASE** is lost. To keep all the data (incase the import fails) and to provide a template for future imports save the file in Excel format using **File, Save As** and select the **Microsoft Office Excel Workbook (*.xls)**.

4.4 Populate the Fields with Data

Now populate the fields with the new data:

- Unique Activity IDs may be created with the Concatenate function which will join together cell data and any other text data in “rabbit ears” (Quotation Marks) may be entered in the formula, see the picture below with the formula in the top line:

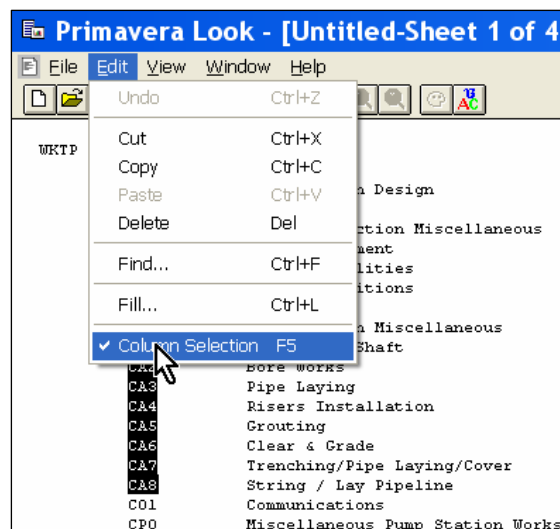
A1		fx =B1&"XX"&C1	
	A	B	C
1	AEXX1010	AE	1010

- Unique Activity IDs may be created with the formulae below in cell C2 and dragged down, see the picture below with the formula in the top line:

C2		fx =C1+10	
	A	B	C
1	AEXX1010	AE	1010
2	AEXX1020	AE	1020
3	AEXX1030	AE	1030
4	AEXX1040	AE	1040

- Activity Code values and not descriptions must be used in the spreadsheet.
- Activity Code descriptions have to be manually typed in or imported using the spreadsheet provided by Primavera Systems Inc on the installation disk or using Solution ID: **200252492644** “**How can I update my dictionaries in P3 using Excel?**” from the Primavera Systems Inc knowledgebase.

- The Activity Code Dictionary Values, Resources Names etc may be printed to Primavera Look using the **Print...** button in the appropriate form. The Values may then be the Cut and Pasted to the spread sheet, say in a new sheet, after selecting **Edit, Column Selection** in Primavera Look:



4.5 ADD ANY NEW DATA ITEMS IN P3

It is best to add new data items to the P3 project before importing the data. This would include Activity Codes, Resources, Calendars etc that are entered on the spread sheet and which do not exist in the P3 project.

4.6 EDIT THE NAMED RANGE “Database”

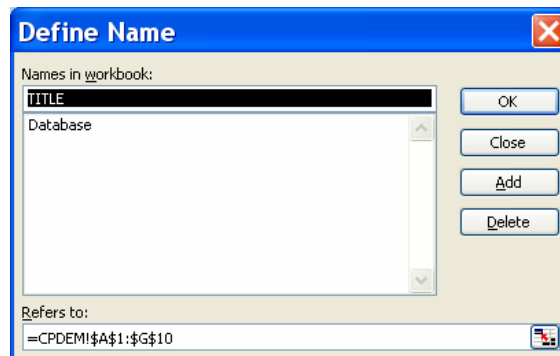
When the file is saved in DBF format only the data in the Named Range “Database” is saved. The remainder is deleted and all formulae and formatting is deleted.

Click on the **Name Box** dropdown box above the **Select All** button and click on “Database” and this will highlight the data that will be saved, the picture below shows that only some of the data is contained in the Named Range “Database”:

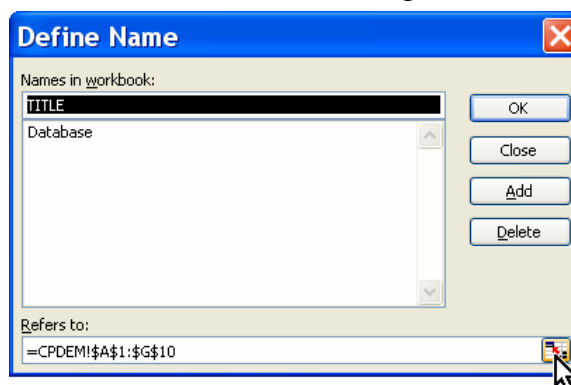
Database		TITLE	
Database	A	B	C
1	TITLE	ACT	AC
2	Rig/Unhead/Blind/Pull Bundle	040160	0.00
3	Jet Clean Bundle & Head	040170	0.00
4	CoP Bundle & Head Inspection	040180	0.00
5	CoP Bundle & Head Inspection	040180	0.00
6	Install Bundle/Head Up/Test	040190	0.00
7	Install Bundle/Head Up/Test	040190	0.00
8	Install Bundle/Head Up/Test	040190	0.00
9	Install Bundle/Head Up/Test	040190	0.00
10	Deblind	040200	0.00
11	Deblind	040200	0.00
12	PSV Remove & Blind Pipework	040210	0.00
13	PSV Remove & Blind Pipework	040210	0.00
14	PSV Remove & Blind Pipework	040210	0.00
15	Overhaul PSV	040220	0.00

To edit or create a Named Range “Database”:

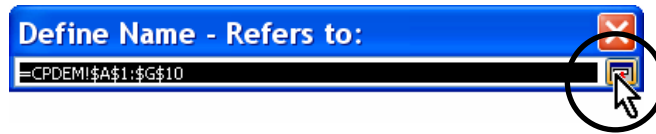
- Select **Insert, Name, Define** to open the **Define Name** form.




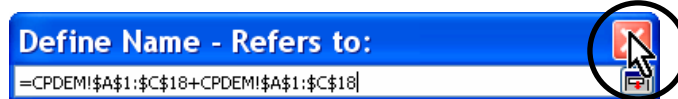
- Click on “Database” to edit the “Database” range:



- Click on the icon in the bottom right hand side to open the **Define Name – Refers to:** form:



- Highlight the data to be imported:
- The click on the  icon to close the **Define Name – Refers to:** form:



- You will be returned to the **Define Name** form, close that and when you select “Database” in **Name Box** then the data to be imported will be highlighted.

4.7 Saving the data

To save the data:

- Save the file in Excel file format and all your data will be saved, including additional sheets and formulae outside the Named Area “Database”. Therefore if you have to fix and error it is simple to fix bu opening the Excel version of the data.
- Save the data as a DBF file format from Excel and close.
- Now open the dbf file and you should check the data that will be imported.

5 IMPORTING THE DATA

5.1 Backup the Project File

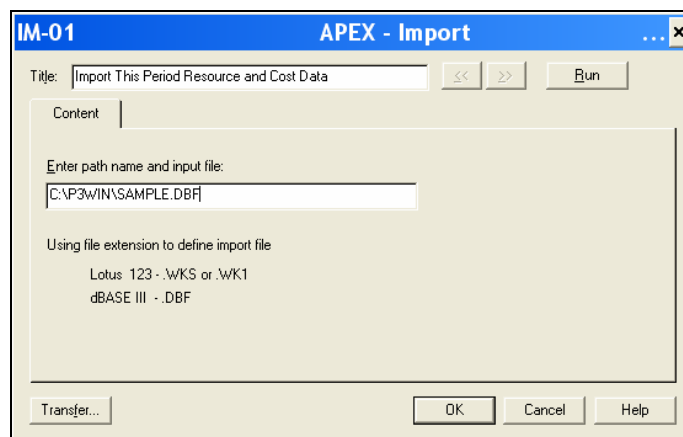
Every file should be backed up before importing data.

Use **Tools, Project Utilities, Backup** to back up the file.

5.2 Import the Data

Use **Tools, Project Utilities, Import** to open the **Import** form:

- Either an existing Import routine or a new Import routine,
- Assign a title,
- Enter the full path, file name and extension,
- Click to save the Import, or
- Click to run the Import.



5.3 Check the Import Log

After the import is complete inspect the import log for errors and actions.

5.4 Check the Imported Data

Now create an appropriate Filter and Layout to check the imported data.