Report Schedule Import Tool

Schedule Import Tool Guide
Version 2.0

Last Modified: 10/21/2021

Last Modified By: Natalie Takacs

Change Log

This change log only contains significant or notable changes to the revision. Any editorial type changes or minor changes are not included.

Revision	Change Date	Description	Modified By
1.0	07/30/2019	Initial draft	Natalie Takacs
1.1	8/13/2019	Added Component information section Quantity Tracking	Natalie Takacs
1.2	5/27/2020	Added Component tagging information from Control	Natalie Takacs
2.0	3/31/2021	Updated to reflect changes in tool to allow all CBS Tags in 21.3	Natalie Takacs

Contents

Overview

This document provides instructions to use the Scheduling Import tool in InEight Report. The purpose of this tool is to provide a way to integrate schedule data with other Project Suite data. The following reports in InEight Report will consume this data:

- Construction Progress Summary
- Manhour Curves
- Commodity Curves
- Earned Values
- Earned Values by Percent Complete

File import template

Regardless of where the schedule data is coming from, the import file needs to be in a very specific format. The template .csv file is accessible in the application for you to download and complete on your own. Or, you can start from a blank worksheet inside the application if you would like. The Import tool is specific to .csv file format so it is important that the format of the template not be changed prior to uploading.

You can also recreate this template in your P6 system as an export to .csv so you do not need to do any manual manipulation to your file before importing it into the Report Schedule Import tool.

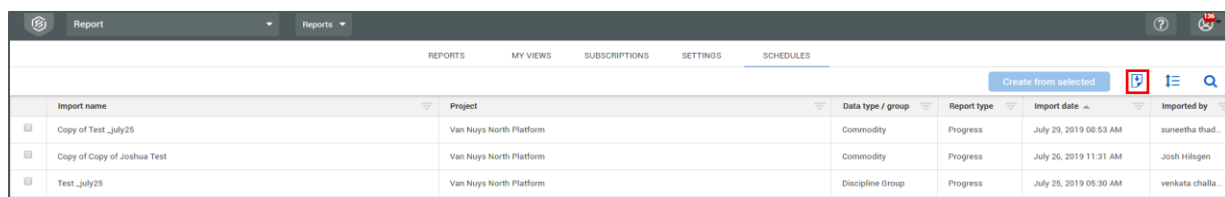A few things to note about this template:

- Data is captured daily
- Manhours can be entered as hours or percent complete
- Commodities can be entered by quantity or percent complete
- Components are associated to commodities in Plan > Quantity Tracking
- The file format **MUST** be kept as .csv
- The values in Project Suite for your desired grouping must match exactly as it is in the imported schedule

Importing an existing schedule file

To import a schedule, in Report navigate to the Schedules tab.
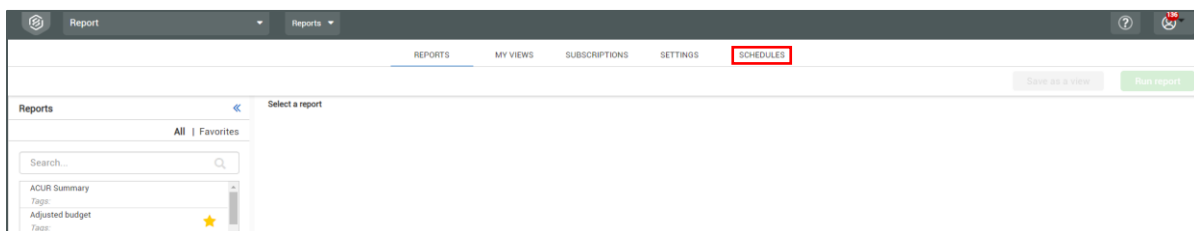
The Schedules tab contains a log of all schedules you have access to see. In the upper right-hand corner, select the Import button.

If you are importing a P6 file (or any other schedule in the specified format), select "Import from .csv." You can also copy and paste data into a blank worksheet if you need to do some data manipulation and would rather do it in-app.
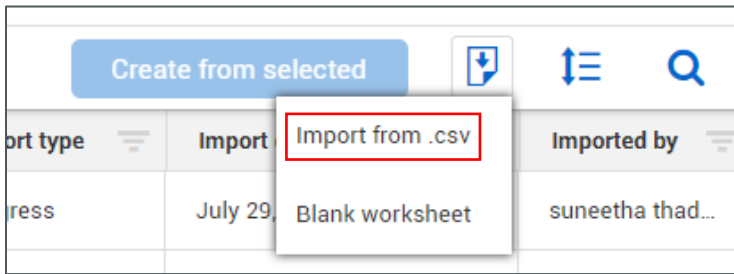
A window will appear where you can drag and drop the file you wish to import, or you can browse to and select from there. From this screen you can also download the .csv template if you wish to fill in the information yourself. Once you have selected your desired file, click "Next."
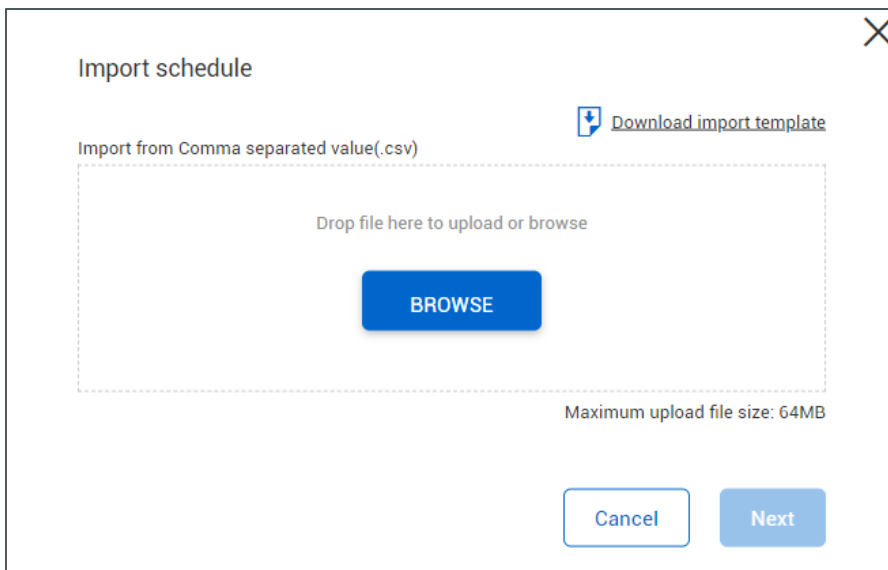
The next step is to fill in the metadata about this upload. This information will be used when pulling the data into reporting (except for the naming convention of the file). You will need to indicate how your file is grouped. The Import file can be grouped by Account Codes, CBS Tags 1-25, Plan Construction Commodity and CBS User Defined field 3. Please note that any custom renaming of these fields will be reflected in this drop-down list. Then, in the Report type you will need to indicate if the import is a Baseline or Progress.

After clicking "Next," you will be directed to the data editing/validation screen. **Every schedule must be validated before the import can be finished.** If there is an error in your file, the cell with the error will highlight red. Once you have corrected any errors and the file is validated, the "Finish" button will become enabled. Once your import finishes successfully, you will be redirected back to the Schedules tab.

Updating an existing schedule

Once a schedule has been imported, it can also be updated in the application without having to make changes locally in the .csv file then re-uploading. This process will create a new record in the import log.

In the Schedules tab, select the schedule you wish to update by clicking on the corresponding checkbox on the left-hand side, click "Create from selected" (this button is only enabled if the user has a schedule selected). You will then be directed to the metadata and data entry/validation screens as outlined in the previous section of this document.

At any point in time, you can edit a previous schedule and it will automatically save as the latest. Anytime a schedule is updated/replaced, the previous data will still be saved in the database, though the InEight reports will only reflect data from your latest schedule upload or edit. This means that any time you update and save the schedule for a project that is the data the report will display.

NOTE:	The InEight reports that utilize this data will only reflect the most recent import for each import type (Baseline/Progress and Data type or Group indicated at the time of import).

Plan Construction Commodity

Individual components can be assigned to contribute to Commodity Curves. To do this, you must associate the component to a commodity in Plan or Control. To tag the component you are working with in Plan, navigate to Plan > Quantity Tracking > Component Details > Location. You **MUST** associate the component to a commodity if you want it to contribute to the graph, because it will tie to the Activity ID column in the schedule you imported which will then tie to the quantity.

CBS Tags and User Defined 3

To update these tags in Control, navigate to Control > Workspaces. Select a CBS item, then click the edit button. This will prompt a slide-out menu on the right-hand side. Select Attributes, then add your tag selection to your desired CBS tag, or use the User Defined 3 field. Like if you were to tag commodities in Plan, when utilizing UDF 3 in Control your tag *must* match the Activity ID column text *exactly* in the upload template.