

## **Activities columns and fields imported from XLS files**

### **Columns**

WBS Code	wbs_id
Calendar	clndr_id
Percent Complete Type	complete_pct_type
Activity Status	status_code
Activity ID ***	task_code
Activity Name	task_name
Remaining Duration	remain_drtn_hr_cnt
Original/Planned Duration	target_drtn_hr_cnt
Actual Start	act_start_date
Actual Finish	act_end_date
Activity % Complete	complete_pct
Primary Constraint	cstr_type
Primary Constraint Date	cstr_date
Secondary Constraint	cstr_type2
Secondary Constraint Date	cstr_date2
Project Codes	proj_catg_XXXXX_id
Activity Codes	actv_code_XXXX_id
All UDFs	

Though not marked (\*) Project Codes cannot be updated or imported.

### **Notes:**

Columns marked with an asterisk (\*) in the export file indicate that they are calculated fields or non-importable fields and are ignored during import.

If you modify a field name in the export file, the column will be ignored during import.

\*\*\* Refer to the Project Management Help topic " Updating Unique Columns" for information about updating these columns.

## **Expenses columns and fields imported from XLS files**

<b>Columns</b>	<b>Field Name</b>
Cost Account ID	acct_id
Activity ID ***	task_id
Expense Item ***	cost_name
Document Number	po_number
Vendor	vendor_name
Actual Cost	act_cost
Remaining Cost	remain_cost
Budgeted/Planned Cost	target_cost
Budgeted/Planned Units	target_qty
Unit of Measure	qty_name
Expense Description	cost_descr
At Completion Cost	total_cost
Actual Units	act_units
Remaining Units	remain_units
At Completion Units	at_completion_units
All UDFs	

### **Notes:**

Since any hierarchical information relating to cost accounts is not exported to Excel, ensure that Cost Account IDs are unique throughout the entire dictionary. Note that any cost accounts that do not have unique Cost Account IDs may be overwritten during the import process.

For example, assume that the PM database has two cost accounts AAA and ZZZ, both of which have child cost accounts with Cost Account ID of 01. In this case, the child cost accounts will have fully qualified paths of AAA.01 and ZZZ.01. However, both of these cost accounts will be exported to Excel with 01 in Cost Account ID column. Attempts to use the resulting Excel spreadsheet to import data into PM may not succeed.

Ensuring that all Cost Account IDs are unique throughout the dictionary will avoid problems relating to Excel import/export operations.

The Activity Status column is used as an indicator in the Expenses/Resource Assignments/Activity Relationships section of the export file. This column is ignored during import.

You can update Activity Status in the Activities subject area.

Columns marked with an asterisk (\*) in the export file indicate that they are calculated fields or non-importable fields and are ignored during import.

If you modify a field name in the export file, the column will be ignored during import.

\*\*\* Refer to the Project Management Help topic " Updating Unique Columns" for information about updating these columns.

## **Relationships columns and fields imported from XLS files**

<b>Columns</b>	<b>Field Name</b>
Successor ***	task_id
Predecessor ***	pred_task_id
Relationship Type ***	pred_type
Lag	lag_hr_cnt

### **Notes:**

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If you modify a field name in the export file, the column will be ignored during import.

\*\*\* Refer to the Project Management Help topic " Updating Unique Columns" for information about updating these columns.

## **Resources columns and fields imported from XLS files**

<b>Columns</b>	<b>Field Name</b>
Calendar	clndr_id
User Login Name	user_id
E-Mail Address	email_addr
Employee ID	employee_code
Office Phone	office_phone
Other Phone	other_phone
Resource Name	rsrc_name
Resource ID	rsrc_short_name
Title	rsrc_title_name
Default Units / Time	def_qty_per_hr
Unit of Measure	unit_id
Resource Codes	rsrc_catg_XXXXXX_id
All UDFs	

### **Notes:**

Columns marked with an asterisk (\*) in the export file indicate that they are calculated fields or non-importable fields and are ignored during import.

If you modify a field name in the export file, the column will be ignored during import.

You cannot import any global data, such as resources and codes, that does not currently exist in the Project Management database.

\*\*\* Refer to the Project Management Help topic " Updating Unique Columns" for information about updating these columns.

## **Resource Assignments columns and fields imported from XLS files**

### **Columns**

Activity ID \*\*\*  
Role ID \*\*\*  
Cost Account ID \*\*\*  
Resource ID \*\*\*  
Remaining Units  
Budgeted/Planned Units  
Remaining Units/Time  
Budgeted/Planned Cost  
Remaining Cost  
Actual Start  
Actual Finish  
Actual This Period Cost  
Actual This Period Units  
Curve  
Actual Units  
At Completion Units  
Actual Cost  
At Completion Cost  
Original/Planned Duration  
Remaining Duration  
Units % Complete  
Remaining Lag  
Unit of Measure  
Resource Codes  
All UDFs

### **Field Name**

Task\_id  
role\_id  
acct\_id  
rsrc\_id  
remain\_qty  
target\_qty  
remain\_qty\_per\_hr  
target\_cost  
remain\_cost  
act\_start\_date  
act\_end\_date  
act\_this\_per\_cost  
act\_this\_per\_qty  
curv\_id  
act\_qty  
total\_qty  
act\_cost  
total\_cost  
target\_drtn\_hr\_cnt  
remain\_drtn\_hr\_cnt  
effort\_complete\_pct  
remain\_lag\_drtn\_hr\_cnt  
unit\_of\_measure  
rsrc\_catg\_XXXXX\_id

### **Notes:**

Since any hierarchical information relating to cost accounts is not exported to Excel, ensure that Cost Account IDs are unique throughout the entire dictionary. Note that any cost accounts that do not have unique Cost Account IDs may be overwritten during the import process.

For example, assume that the PM database has two cost accounts AAA and ZZZ, both of which have child cost accounts with Cost Account ID of 01. In this case, the child cost accounts will have fully qualified paths of AAA.01 and ZZZ.01. However, both of these cost accounts will be exported to Excel with 01 in Cost Account ID column. Attempts to use the resulting Excel spreadsheet to import data into PM may not succeed.

Ensuring that all Cost Account IDs are unique throughout the dictionary will avoid problems relating to Excel import/export operations.

Columns marked with an asterisk (\*) in the export file indicate that they are calculated fields or non-importable fields and are ignored during import.

If you modify a field name in the export file, the column will be ignored during import.

\*\*\* Refer to the Project Management Help topic " Updating Unique Columns" for information about updating these columns.

## **Default columns per subject area**

<b>Activities</b>	<b>Activity Relationships</b>	<b>Expenses</b>	<b>Resources</b>	<b>Resource Assignments</b>
Activity ID	Predecessor	Activity ID	Resource ID	Activity ID
Activity Status	Successor	Expense Item	Resource Name	Activity Status
WBS Code	Relationship Type	Activity Status	Resource Type	Resource ID
Activity Name	Predecessor Activity Status	Budgeted/Planned Cost	Unit of Measure	Role ID
Start	Successor Activity Status	Actual Cost	Role ID	Cost Account ID
Finish	Predecessor Project	Remaining Cost	Default Units / Time	Resource Type
Resources	Successor Project	At Completion Cost		Price / Unit
	Predecessor WBS			Start
	Successor WBS			Finish
	Predecessor Activity Name			
	Successor Activity Name			
	Lag			
	Predecessor Primary Resource			
	Successor Primary Resource			

### **Note:**

Blue text indicates that the column is required for importing and exporting. The column cannot be removed from the export template and must exist in the import file to import successfully.