Utilizing the Schedule Import DQA

What is the Schedule Import Utility Desktop Quick Application (DQA)

The Schedule Import DQA is a utility that allows the ePM Scheduler to upload and manage Primavera P6 EC XER files, and Microsoft Project XML files into a ePM Project. The utility will import activity codes, tasks and milestones, and links and dependencies. The ePM Schedule Import Utility DQA provides flexibility by allowing users to fully utilize ePM scheduling features.

Who Will Use This?

√ Scheduler

Benefits:

➢ Easy-to-use, wizard for uploading scheduling files

➢ Improve team communication with centralized collaboration on project schedules

➢ Enable easy migration of desktop schedules

➢ Report on multiple schedules in a single database

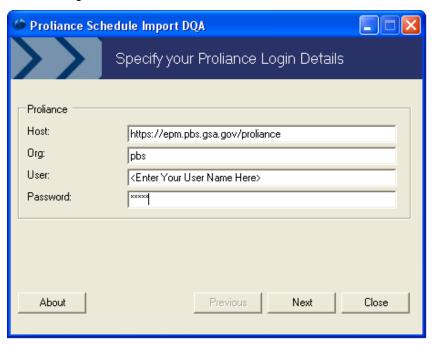➢ Distribute schedules to multiple Proliance users through Proliance Workflow

Steps to Utilize the Schedule Import Utility

Launch the Scheduling Import Utility Wizard and follow the steps:

1. Click Start, All Programs, Meridian Systems, Proliance Desktop Quick Apps, Proliance Schedule Import DQA.

2. Enter the login credentials.

- **Host**: This is the full URL that is used to access your ePM system. You must start with https:// and the "/proliance" at the end is also required. Enter **https://epm.pbs.gsa.gov/proliance**.

- **Org**: This is your ePM Organization name "**pbs**"

- **User**: This is your assigned ePM user ID. The schedule will be created under your login.

- **Password**: This is your assigned ePM password.

    Note: If the Org, User, or Password is incorrect a message will appear below the password.

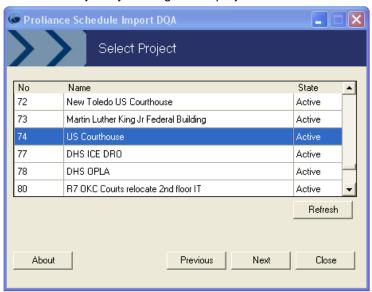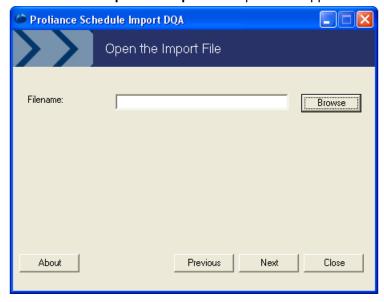# Steps to Utilize the Schedule Import Utility, cont.

3. Click **Next.**

    Note: If you receive a request failed pop-up box, confirm that the host address is correct and that you have installed .NET Framework (refer to Desktop Requirements QRG)

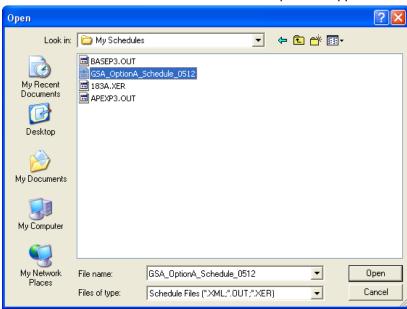4. Select the Project by clicking on the project name.

5. Click **Next.** The **Open the Import File** option box appears.

Steps to Utilize the Schedule Import Utility, cont.

6. Click **Browse** and select the schedule file to import.   Supported files are XML, OUT or XER files.

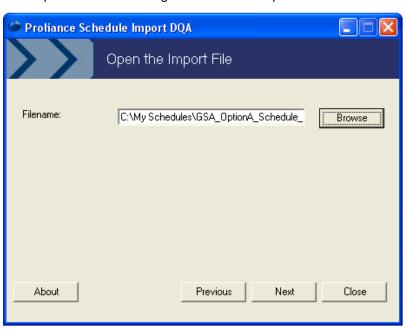7. Select the **Open** button to start the import process.

Steps to Utilize the Schedule Import Utility, cont.
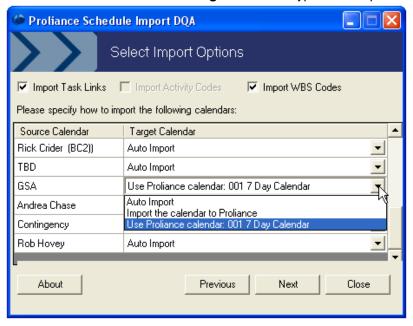
8. The import Filename: dialog box contains the path and filename of the import file.

9. Click **Next** and **Select Import Options** box appears.
10. Select the arrow button for the **Target Calendar** type as the option for the import file.

Steps to Utilize the Schedule Import Utility, cont.

Note: The **Source Calendars** are typically pre-populated in ePM. They can be titled in different ways such as by resource name, or by type as shown below.
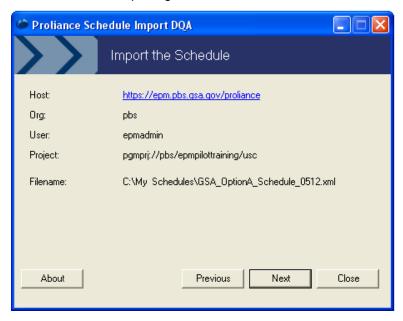
Source Calendar	Target Calendar
5 Day Workweek - US ...	Import the calendar to Proliance
W : 5 Day w/Holidays- ...	Import the calendar to Proliance

11. Click to place checkmark to import **Task Links**, **Activity Codes, Import WBS Codes**.

☑ Import Task Links ☐ Import Activity Codes ☑ Import WBS Codes

Note: The **Import Activity Codes** option is grayed out when they don't exist in this specific schedule to import.

12. Click **Next** button. [Next] and the **Import the Schedule** box appears with login and filename details.

13. After the Import Options are selected the **Import the Schedule** box appears as an option to verify the details before importing the file.

Proliance Schedule Import DQA

Import the Schedule

Host:	https://epm.pbs.gsa.gov/proliance
Org:	pbs
User:	epmadmin
Project:	pgmprj://pbs/epmpilottraining/usc
Filename:	C:\My Schedules\GSA_OptionA_Schedule_0512.xml

[About]   [Previous] [Next] [Close]

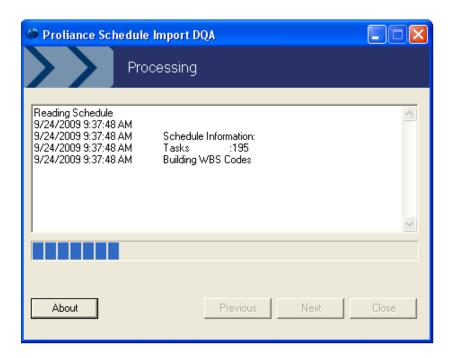14. Verify the information is correct and click **Next.**

Note: The import could take several minutes for large schedules. If you selected the wrong filename by accident, select **Previous** and browse to the appropriate schedule file.

15. The **Processing** box appears and illustrates the details of the schedule being imported into ePM.
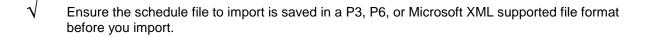
16. Once the file is successfully imported, the gray **Close** button will appear**.** Select **Close** to complete the schedule import process.

    Note: The schedule is now available in the ePM Schedule register along with other schedule documents for the project that was selected.

Tips

√ Ensure the schedule file to import is saved in a P3, P6, or Microsoft XML supported file format before you import.

√ Create ePM Calendars by Type or Resource prior to importing the schedule.

√ Microsoft Project Schedules must be saved as .xml files prior to import.

√ The following security permissions are required to Import Schedules

- o Read/Create Schedules
- o Read/Create Activity Code Groups
- o Read/Create Activity Codes

√ The Schedule DQA requires the following:

- ✓ Microsoft .NET Framework 3.5 Service Pack 1
- ✓ Microsoft Web Services Enhancements 2.0 Service Pack 3