

Aphex Planner

Import Quick Reference Guide



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Optional Step: Enrich your Master Data

If you would like to prepopulate attributes such as Subcontractor, Owner or Location to reduce the work of your Delivery teams then follow these steps:

1. In your master schedule (Primavera P6 or Microsoft Project) create user defined fields for each of the attributes (i.e. Subcontractor or Owner) you wish to prepopulate.
2. Name each user field or column something memorable like Apex Subcontractor.
3. Assign the attributes to your tasks that you wish to prepopulate.



Optional Step: Create a Simple Structure (P6 only)

If you would like to bring your master schedule data in with a structure or WBS then Planner can do that to!

However, we strongly recommend considering whether your delivery team will want to work in your project WBS structure or something simpler.

Using your existing WBS requires no work so you can just skip this! If you would like to prepopulate a simple structure in your master schedule then this can be done using Activity Codes. Create your simple structure in P6 with activity codes and assign these to your work. There are many P6 tutorials covering Activity Codes, here's an example: <https://www.projectcubicle.com/primavera-p6-activity-codes/>.

The screenshot displays the Primavera P6 software interface. The main window shows a project schedule with a table of activities. The 'Assign Activity Codes' dialog box is open, showing a list of activity codes and their descriptions.

#	Activity ID	Activity Name	Original Duration	Start	Finish	Subcontractors
1		Pipe Repair & Improve	14.00d	04-Sep-2017	07-Sep-2017	
2	W1000	Contract Award Date	0.00d	04-Sep-2017		
3	W1010	Start Project	0.00d	04-Sep-2017		
4	W1020	Project Management	14.00d	04-Sep-2017	04-Sep-2017	
5	W1030	Project Com				
6		Demolition Piping				
7	W1040	Drain Piping				
8	W1050	Remove Dar				
9		Installation Piping System				
10		Piping				
11	W1060	Install Piping				
12	W1070	Test Piping a				
13	W1080	Insulate Pipi				
14		Thrustblock				
15	W1082	Set Forms				
16	W1084	Lay Rebar				
17	W1086	Pour Concre				
18	W1088	Strike Forms				
19		Quality Assurance				
20	W1090	Write Quality				
21	W1100	Final Quality				

Code Value	Description
EPS/Project: PIPE REPAIR-20	Pipe Repair & Im
Activity Code: Subcontractors	
TOTAL ENG	Total Engineering
FITTERS	Pipe Fitters Enterprises
PITT	Pitt Insulation
SOLID	Solid Concrete Incorporated



Step 1: Export your Data

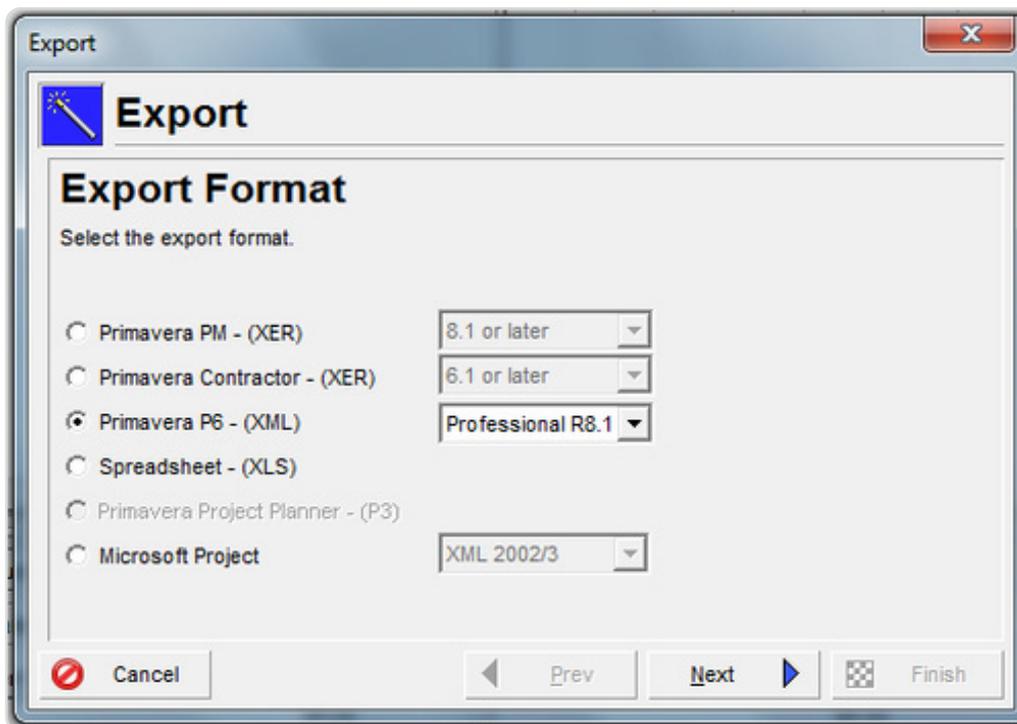
The quickest and easiest way to get your master schedule data into Planner is via an XML file. Both P6 and MS Project allow exporting in this format. For directions on how to do so, visit:

P6:

https://docs.oracle.com/cd/E17266_01/p6help/help/en/helpmain.htm?toc.htm?7973.htm

MS Project:

<https://support.microsoft.com/en-gb/office/export-or-import-data-to-another-file->





Step 2: Start your Import

1. Open the project in Planner that you wish to import data into.
2. Navigate to the Project Drop-down menu (top left!).
3. Select Pull in Data from the Project Drop-down menu.
4. Select XML File Type.
5. Select Next.
6. Click or drag your file to the upload area to send your file to the cloud.

Pull in Master Schedule Data

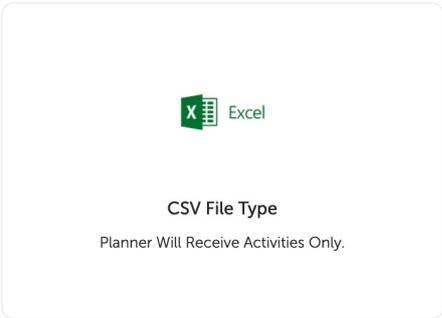
Where do you want to pull data from?



XML File Type

Planner Will Receive Activities, Links, WBS, Calendars.
Basically Everything.



 Excel

CSV File Type

Planner Will Receive Activities Only.

[Next](#)



Step 3: Filter your Data

Planner is all about getting teams the right data and our import does just that - this step will filter your imported data to an appropriate time range. All you have to do is select the timeframe that suits your project!

Not sure which to choose? Most projects benefit from frequent imports that have shorter durations. This limits the amount of work the team need to do in Planner when the master schedule is changed - and the data always stays fresh. Don't worry, Planner will continually attach new work to the existing activities so you can import as often as you like.

We recommend importing 4-12 weeks of work each month.

1 Step 1
Configure Data

2 Step 2
Custom Data

3 Step 3
Calendar

What activities do you want to bring into Planner?

- 4 week look-ahead
You might find this a little restrictive for the team.
- 12 week look ahead
Recommended! Not too short, not too long, its just right.
- All Future Activities
Plans change. Bringing in everything now may now add unnecessary admin when they do.
- Everything
Unless you have a very simple master schedule your team will not enjoy sifting through this much data!

747 items

1546 items

2625 items

32983 items



Step 4: Map your User Defined Fields

If you did the work in those optional steps at the start, this is where it all pays off!

Select the title of your User Defined Field from the dropdown for each of the fields that you want to import.

Little hint for the future - naming your user defined fields exactly (AphexSubcontractor for example) will allow Planner to automatically match it. It's a great way to shave more time off your day!

Then just select Next...

The screenshot shows a three-step progress bar at the top. Step 1, 'Configure Data', is completed with a checkmark. Step 2, 'Custom Data', is the current step and is highlighted with a blue circle. Step 3, 'Step 3', is partially visible. Below the progress bar, the main heading asks 'Are you using user defined fields to store Planner data?'. Underneath, the instruction 'Map your user defined fields to Planner' is followed by three dropdown menus. The first dropdown, labeled 'Subcontractor', is open, showing options: 'New', '(New)', and 'Aphex Owner'. The second dropdown is labeled 'Location' and the third is labeled 'Owner'. Below the dropdowns, a text box explains: 'Planner will automatically match your user defined fields if they are named [blank] or AphexOwner'. At the bottom, there are two buttons: 'Go Back' and 'Next'.



Step 5: Calendars

Sit back and relax as Planner does the work here.

Firstly, Planner will search for any calendars that exist on your project already and then match them by name. Any that it finds will have activities automatically assigned to the existing matched calendar.

Planner will then read the calendars of any that it hasn't seen before and automatically determine the best base calendar and shift. These can be checked and adjusted if you like.

Don't worry about your holidays and non-working days, these are all captured.

Now just select next!

New Calendars

Planner has identified 1 new calendars in your Master Schedule. Planner can either map activities to an existing calendar or it can create a new calendar to match the master schedule.

zz-COS01 - 5d (8hr + BH +Xmas+3d)	Type: 5 Day	Shift: Day
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[Go Back](#) [Next](#)



Step 6: Structure

Last Step!

Similar to calendars, Planner will find and match all WBS codes in your file to that in Planner. Any new codes will then be listed and available to import.

If you created an alternative and simple structure via activity codes then you will want to select “I want to use an Activity Code Structure”. Planner will rescan your file based on the activity codes rather than WBS.

Once you are ready, select Import!

Note - to keep your plan as simple as possible, Planner will only import the structure that relates to the time range you filters in step 2.

New WBS Codes

Planner has identified 1 new WBS Codes in your Master Schedule. Planner can create new WBS codes and assign activities accordingly or leave the imported activities unassigned for editing in Planner.

Code: Name: