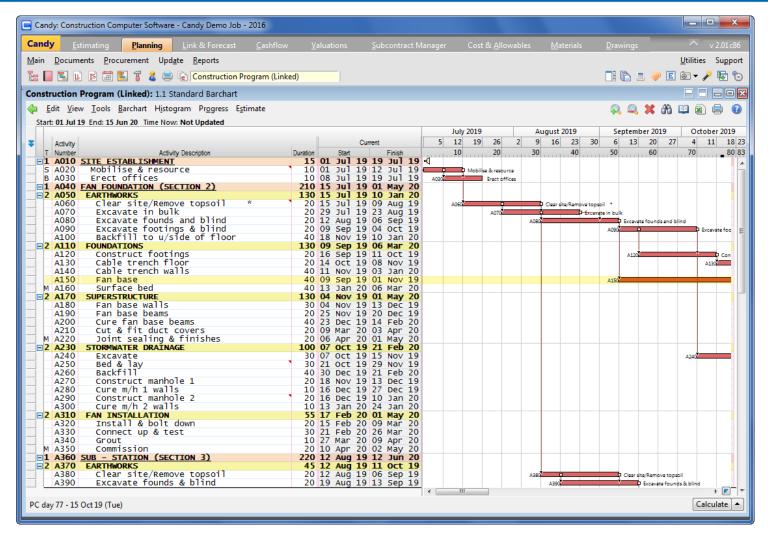


Data exchange between Candy Planning and Microsoft Project



Export Candy Planning to Microsoft Project



SitePlan program

Before a program is exported ensure that all the logic links, BOQ links, etc. are correct

What gets exported?

Program

- Start date
- Multiple calendars with holiday/workday exceptions
- Summary headers as indented tasks

Activities

- Activity numbers (to TEXT 1 column in MSP)
- Activity descriptions
- Activity durations -- Start and End dates
- Precedence Logic

What gets exported?

Activity types

- Special activity types are exported as follow:
 - Contract start = Must Start On
 - Contract end = Finish No Later Than
 - Target start = Start No Earlier Than
 - Target end = Finish No Later Than
 - B type = Start No Earlier Than
 - H type = Normal activity with universal calendar (7days) allocation
 - Tied (hammock) = normal activity (MS Project does not have such a type)
 - F type = normal activity (MS Project does not have such a type)
 - V type = normal activity (MS Project does not have such a type)
 - M type = normal activity (MS Project does not have such a type)
 - K type = normal activity (MS Project does not have such a type)

What does not get exported?

Activities

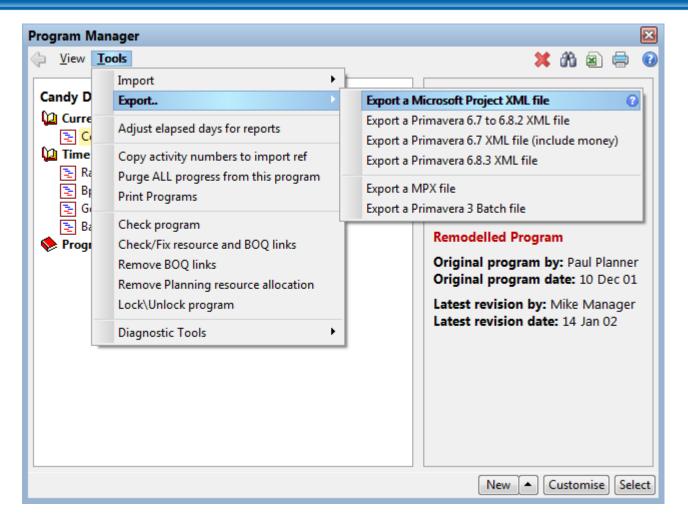
- Remarks, notes and calculation sheets
- Base program and snapshots
- Special types i.e. T-types (SitePlan hammocks)
- Codes i.e. zone, area, etc.
- Time location data
- Information and Long lead schedules data

Resources

- No planning resources are exported
- No estimating resources are exported

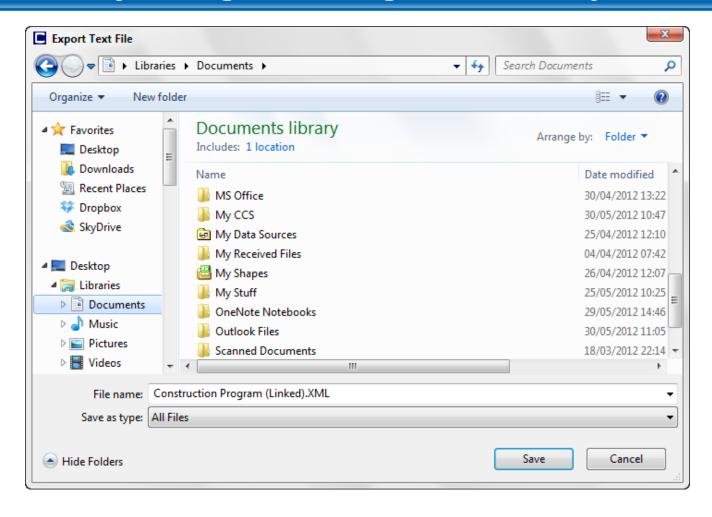
General

- Only planning data mentioned in previous slides are exported.
- No other planning data are exported
- No BOQ linked data are exported.



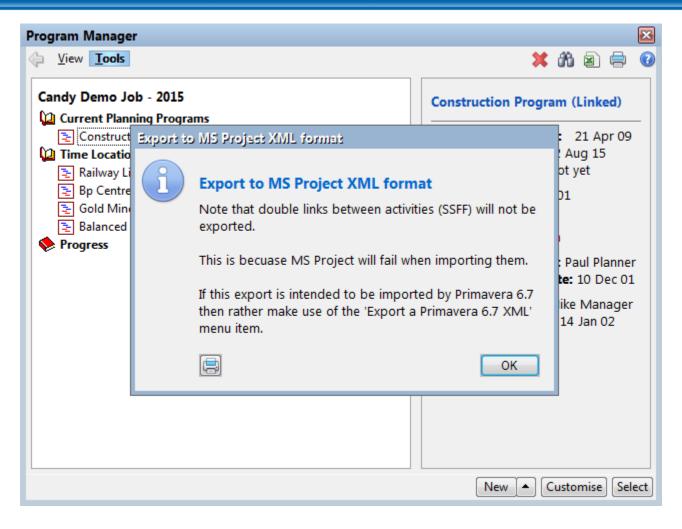
Export the program

In the program manager highlight the program to be exported. Select Tools > Export > Export a Microsoft Project XML



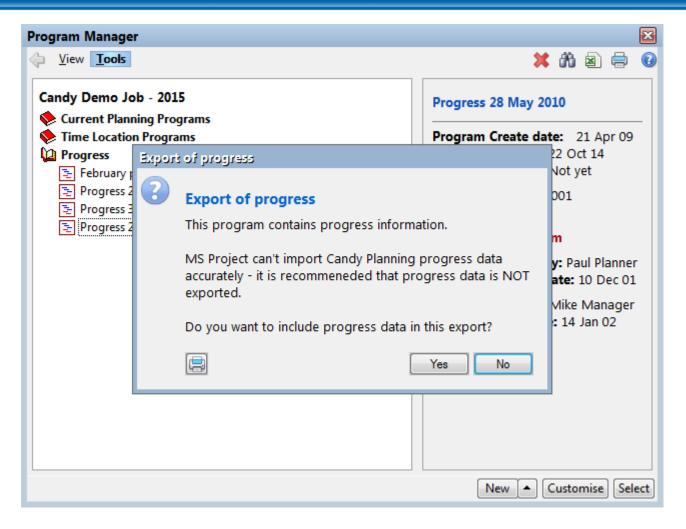
Save XML file

Save the XML file in your destination of choice



Logic link difference warning

Take note that unlike Candy; MS Project does not allow you to link a predecessor task twice to the same successor task.

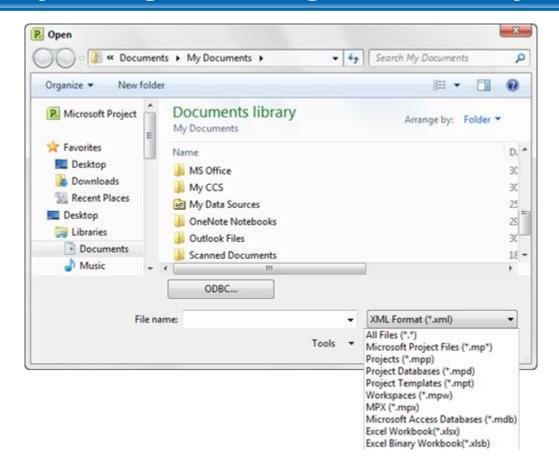


Progress export warning

Take note export of progress information is NOT recommended. MSP calculates the progress different than Candy (or Primavera®); especially % complete.

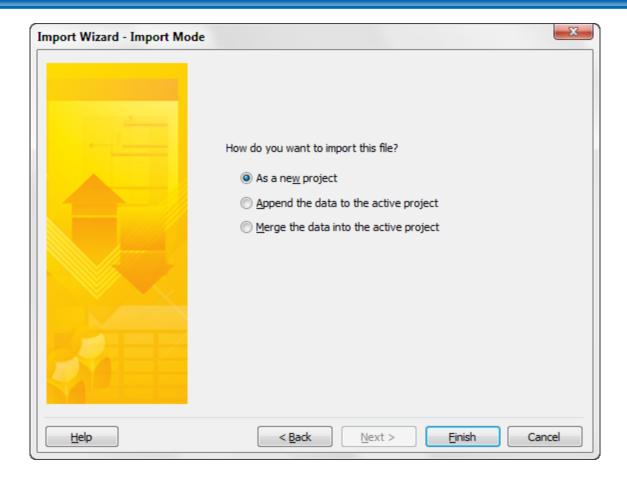


Import Candy Planning into Microsoft Project



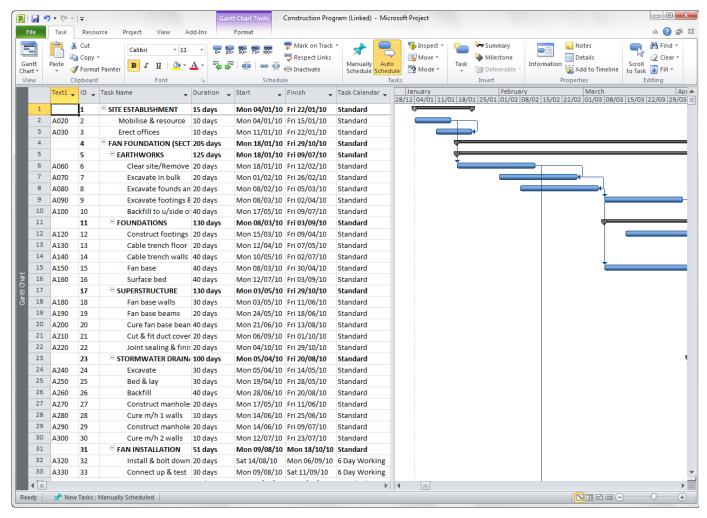
Import the XML into MS Project

In MSP select File > Open. Change the file type XML format. Select the relevant XML.



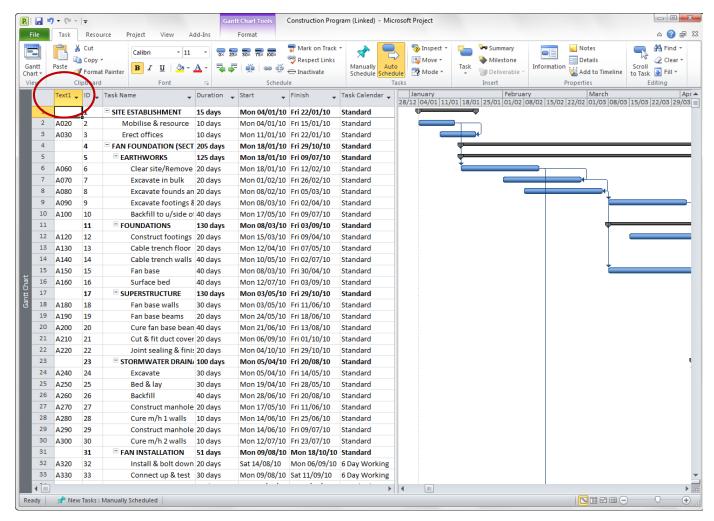
Import the file as a New project

When the Import wizard displays, select the option "As a new project" > Finish.



End result

Open the project and check dates, calendars and calendar allocation as well as holiday exceptions



Activity comparison

The Candy activity numbers are copied into the TEXT 1 column in MSP. Add the TEXT 1 column to see the activity numbers.

<u>Logic differences between SitePlan and MSP</u> A Start Lead in MSP is the <u>number of days</u> from the start of a predecessor to the start of the successor.

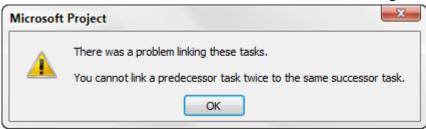
A Start Lead in SitePlan is the number of <u>days of work done</u> in the predecessor before the successor can start.

This will cause differences in results when there is progress out of sequence.

The same applies to End Lags.

MSP does not allow that you link a predecessor task twice to the same successor, Candy does.

During the conversion the one link is dropped and this might lead to a difference in dates when comparing back to Candy. The links might have to be corrected manually.



MS Project is a registered trademark of Microsoft.

Disclaimer

Due to differences in calculation and the activity types between products the responsibility for validating the results must lie with those providing the export file and those doing the import.

How does logic get exported?

Single links

- •Start lead only (Start to Start) link = no problem
- •End lag only (End to End) link = no problem

Double links

•Both Start to Start AND End to End link = potential problem

Potential logic link problem – double links?

Start link "elbow"

- •End to end link is the driving link
- •Start to Start link gets dropped = No problem

												Oc	tober	2012		No	vember	
	Act					Cui	rrent		Imposed			5	12	19	26	2 9	16	23 3
T	No	Activity Descripti	on	Durn		Start	Fir	nish	Date	Floa	t _		10		20	30		40
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	A04			20	12	Oct 12	08 N	lov 12			0	A04	0	7		-	Activity A	
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ACG	+	_						Date	310	CK				08/10) 15/10 2.	2/10 29/1	0 05/11	12/11 19/1

Act#	Task Name	Duration	Jtait ▼	rillisii 🔻	Date	Slack	Constraint Type	08/10 15/10 22/10 29/10 05/11 12/11 19/1:
	☐ Start link "elbow"	28 days	11 Oct '12	19 Nov '12	NA	0 days	As Soon As Possible	→
A030	Contract start activity	1 day	11 Oct '12	11 Oct '12	11 Oct '12	0 days	Must Start On	□
A040	Activity A	20 days	12 Oct '12	08 Nov '12	NA	0 days	As Soon As Possible	
A050	Activity B	20 days	23 Oct '12	19 Nov '12	NA	0 days	As Soon As Possible	

Potential logic link problem – double links?

End link "elbow"

- •Start to start link is the driving link
- •Start to Start link gets dropped = Problem

									Octob	er 201:	2	No	ember 2	2012	Dece
	Act			Cur	rent	Imposed		5	12	19	26	2 9	16	23 3	0 7
	No	Activity Description	Durn	Start	Finish	Date	Float		10		20	30		40	50
		End link "elbow"		12 Oct 12			0	4							
	A070	Activity C			08 Nov 12		0		A070		-	b-	Activity C		
	A080	Activity D			19 Nov 12		0			A080			V	Activity D	
€	A090	Contract End activity	1	20 Nov 12	20 Nov 12	20 Nov 12	0					100	A090	⊯ Contrac	t End activity

Candy _ Act#	Task Name	Duration	Start	Finish	Constraint Date	Free Slack	Constraint Type	r November 08/10 15/10 22/10 29/10 05/11 12/11 19/11 ;
	☐ End link "elbow"	28 days	12 Oct '12	20 Nov '12	NA	0 days	As Soon As Possible	
A070	Activity C	20 days	12 Oct '12	08 Nov '12	NA	0 days	As Soon As Possible	
A080	Activity D	20 days	17 Oct '12	13 Nov '12	NA	3 days	As Soon As Possible	
A090	Contract End activity	1 day	20 Nov '12	20 Nov '12	20 Nov '12	0 days	Finish No Later Than	

Recommended checks

Contract starts and ends; Target starts and ends are exported as constraints. Ensure that these constraints are set correctly in MSP.

All calendars are exported, but check that the holidays and non-work days are set correctly in each calendar.

A (T)ied activity is not used in MSP and Tied activities are exported as Normal activities. One of the Tied activity's links is discarded during the conversion process.

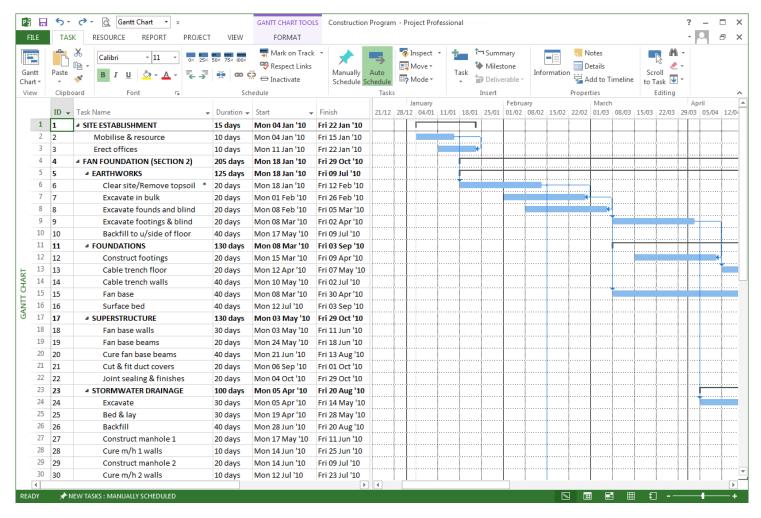
The Candy activity number is copied into the TEXT 1 column in MSP for comparison back to Candy after import into MSP.

Disclaimer

Due to differences in calculation and the activity types between products the responsibility for validating the results must lie with those providing the export file and those doing the import.

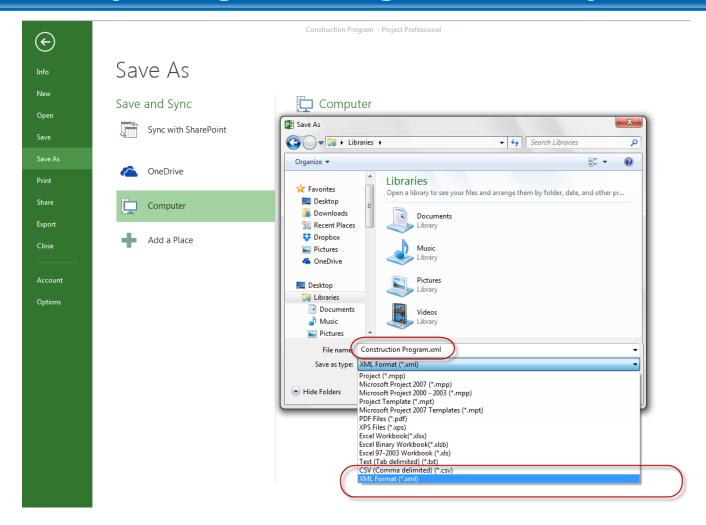


Import MS Project XML file into Candy Planning



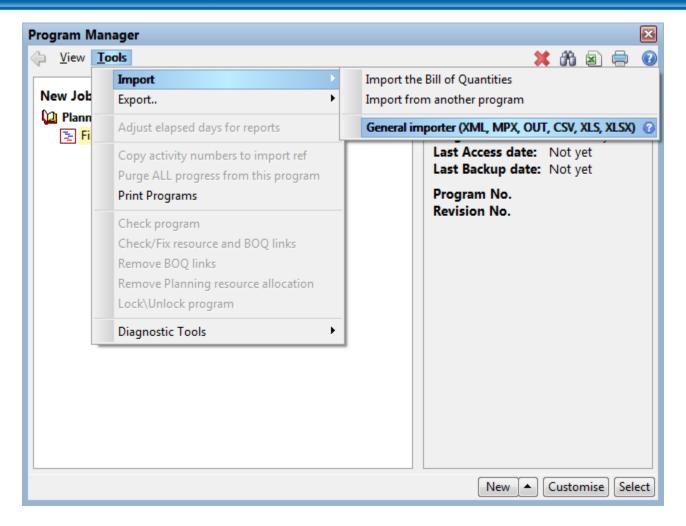
Microsoft Project program

In Microsoft Project (MSP) select File > Save as



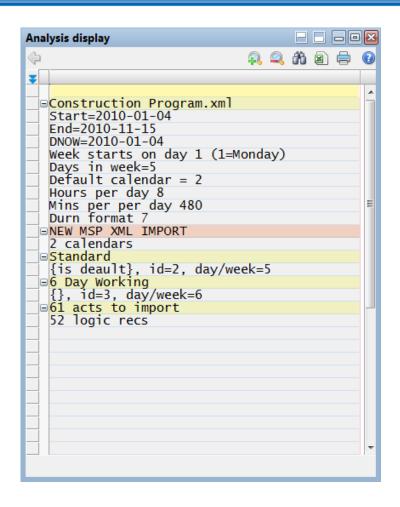
Save as a XML type file

Select Browse > Change "Save as type" to "XML format (*.xml)"



Import the program

In the program manager select Tools > Import > General importer (XML ...)



Analysis display

At the end of import process an analysis report will be displayed. If any conversion problems were encountered it will also be included in the report.

What gets imported?

Program

- Start date
- Multiple calendars with holiday/workday exceptions
- Summary headers as indented tasks

Activities

- Activity ID (to Import reference column in Candy)
- Activity descriptions
- Activity durations -- Start and End dates
- Precedence Logic

Activity types

- Special activity types are imported as follow:
 - Must Start On = Contract start
 - Finish No Later Than = Contract end
 - Start No Earlier Than = Target start
 - Finish No Later Than = Target end

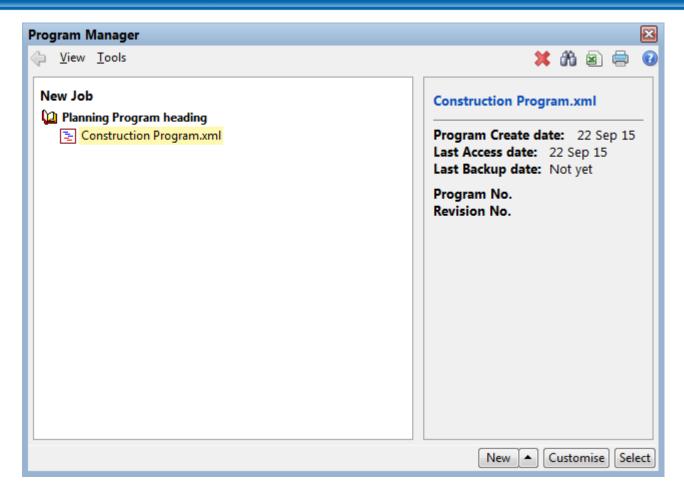
What does not get imported?

Activities

- Base program and snapshots
- Special task types
- Milestone mark
- User defined columns

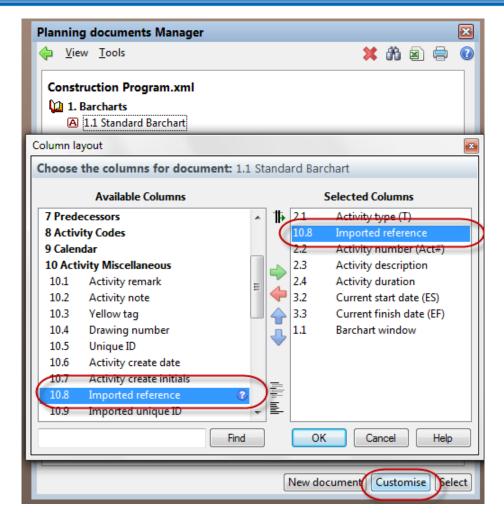
Resources

- No resources are imported
- No resource calendars are imported



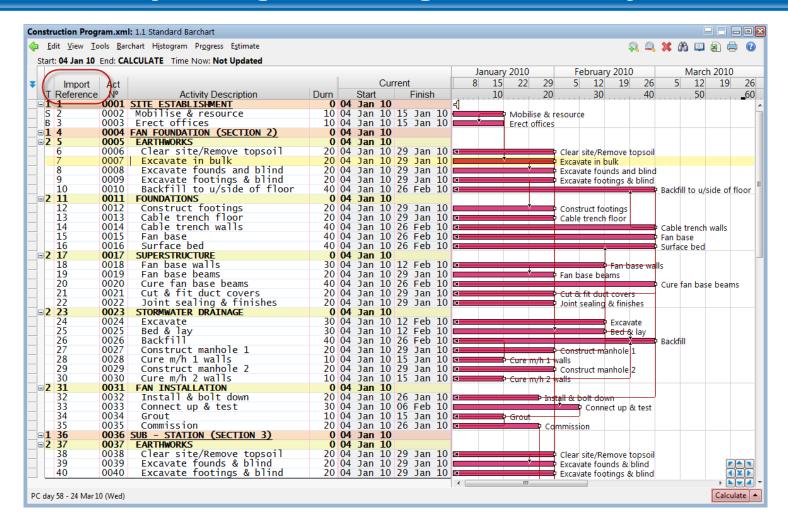
Imported program in Program manager

The imported program will be added to the program manager. Select the program.



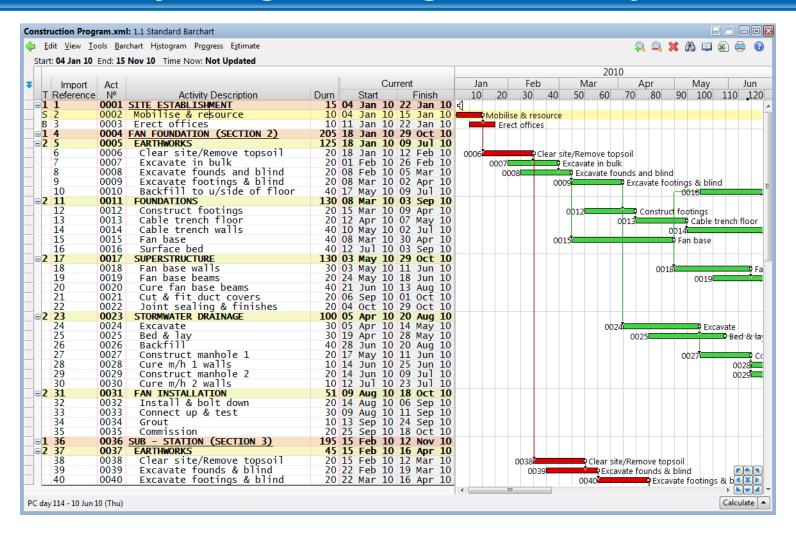
Customise a view to include "Import reference"

Add the import reference column to your document view to see the MSP activity Id for comparison.



Calculate the program

Press the Calculate button to calculate the imported program.



Import complete

Once complete check & compare the calendar, holidays and activity dates.

Recommended checks

Constraints are imported as Contract starts and ends; Target starts and ends. Ensure that these constraints are set correctly in Candy.

Only calendars that are used in MSP are imported, check that the holidays and non-work days are set correctly in each calendar.

No user defined columns are imported from MSP

The MSP activity ID is copied into the Import reference column in Candy for comparison back to MSP after import.

Disclaimer

Due to differences in calculation and the activity types between products the responsibility for validating the results must lie with those providing the export file and those doing the import.