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CONVERTING TO AND FROM

PRIMAVERA SURETRAK AND P3

TO MICROSOFT PROJECT

MPX & MPP FORMAT

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1 INTRODUCTION

This article has been updated after the author to include additional information for the management of MSP 2007 files and adding another method of converting from Microsoft Project to SureTrak.

2 TERMINOLOGY

2.1 MSP

Microsoft Project will be referred to as MSP in this document.

2.2 TOPIC ACTIVITIES

Topic Activities are created when using Outlining in SureTrak. Outlining is the default method of summarizing activities in MSP and will normally be displayed when a project is imported to SureTrak or P3 from a project in MPX Format derived from MSP.

SureTrak supports **Topic** Activity Types. These may not be created in P3 but when you open a SureTrak project or import a MPX format project, the Topic activities are visible in P3.

Topic activities may be deleted but not promoted or demoted or have their Task type changed in P3.

2.3 MPX

MPX is a MSP text data format that many planning and scheduling software packages use to interchange data. Due to the differences in the way the software calculates, a schedule imported from MPX will not always give the same answer when calculated in P3 or SureTrak.

2.4 MPP

MPP is the native MSP file format, which may not be read by SureTrak. There are three formats currently in use:

1. MPP used by MSP 2007 (this will be referred as MPP(2007) from now on)
2. MPP used by MSP 2000/2002/2003 /2003 (this will be referred as MPP(2003) from now on) and
3. MPP used by MSP 98 (this will be referred as MPP(98) from now on).

File reading capability

1. MSP98 may not read the MPP(98) or MPP(2007)format,
2. MSP2000/2002/2003 /2003 may read the MPP(98) and MSP(2003) format but not read MPP(2007) and
3. MSP2007 may read MSP(2003) but not MPP(98).

3 PRINCIPALS OF CONVERSION

3.1 P3 to MPX and MPX to P3

To convert P3 to MPX and MPX to P3 there are three tools:

- Use the P3 MPX Conversion Utility, found under the Tools option in P3.
- Use SureTrak to open MPX files and to save SureTrak and P3 files in MPX format.
- Use PIPE, Primavera Inter Product Exchange, this is still by far the best tool in my opinion & is found on P3 CD's.

3.2 MSP98 to MPX

Use the File Save as function and select MPX as the file type.

3.3 MSP2000/2002/2003 /2003 to MPX

MSP2000/2002/2003 /2003 will open a MPX file but it will not save one, the options for converting from MSP 2000/2002/2003 /2003 to MPX are:

- Use MSP2000/2002/2003 and save in MSP98 format, open with MSP98 and save in MPX format.
- Primavera Systems has a MPP to MPX conversion utility available on their web site at primavera.com. This requires you to have MSP 2000/2002/2003 loaded.
- There is a MPX2000 conversion utility found at www.scitor.com, I have not used this product seriously as I use MSP 98, if you use it please let me know how you go. I found this program did not convert notes when I tested it but does not require MSP 2000/2002/2003 to be loaded.

3.4 MPX to MSP2000/2002/2003 or MSP98

Use the MPS file open function and select MPX format.

3.5 MSP(2007) to MPX

Currently the file will have to be save as MSP(2003) and the one of the other methods used until other process are developed by vendors, if this ever happens.

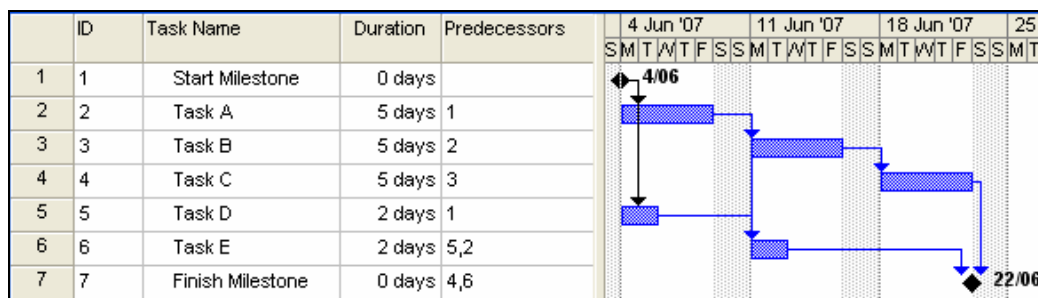
4 CONVERSION TOOLS

4.1 Copy and Paste

There is one simple method of converting unresourced and unprogressed projects from MSP to SureTrak. These projects may then be saved in Concentric(P3) format and then opened with P3. Activities may be copied directly from MSP to SureTrak as long as certain rules are followed:

The following columns should be displayed in MSP:

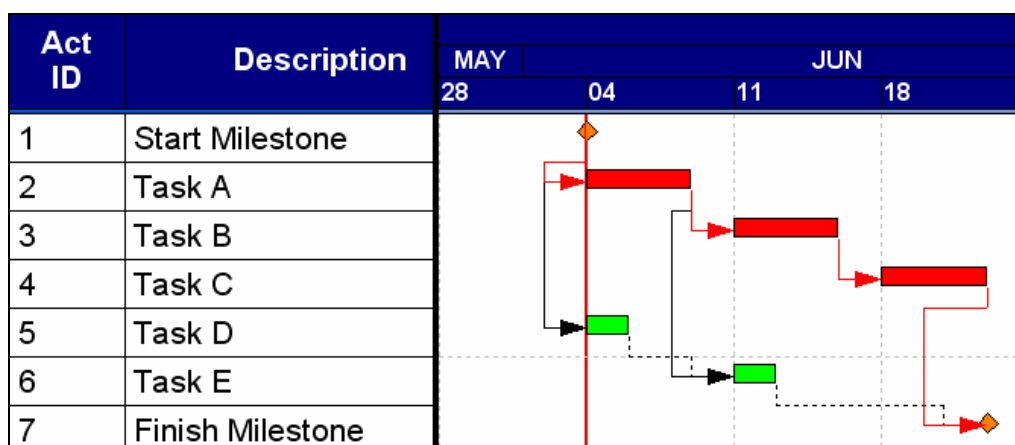
- Two ID columns, the first may not be copied and pasted, so two are required.
- Task Description
- Task Duration
- Predecessor or successor column. There must not be any leads or lags. Any leads or lags should be removed and manually added in SureTrak. Remember these are calculated on SureTraks predecessor calendars and Microsoft 2002 to 2007 successor calendars and 2000 Project calendar.
- Ensure no Summary tasks are copied.



The tasks should be copied from MSP and pasted into SureTrak with the same columns displayed.

The calendars should be manually transferred to SureTrak.

Milestones will have to be set manually in SureTrak.



To renumber the Activities in SureTrak, copy and paste the tasks and select the required Auto increment options.

4.2 PIPE

Pipe, which is an older tool used with earlier versions of P3 for converting to and from P3 to MPX. It has a number of options that may provide a better import, as you are able to nominate specific data held in the MSP Text Columns to become specific Activity Codes in the P3 schedule. These facilities are not available in P3 MPX Conversion Utility or SureTrak. Thus you are able to nominate the P3 Activity ID in an MSP Text column and import it as an Activity ID.

Pipe is not part of a standard P3 install but is available on some P3 CDs and converted files may be opened with either P3 or SureTrak.

4.3 SureTrak

SureTrak will open an MPX file and save the converted file in P3 format and then may the file be opened with P3.

A project converted from MPX will have Activity IDs commence with “0001” and these have a direct relationship with the MPX Task Number. Numeric Activity ID’s will cause problems when copying and pasting from and too products like Excel, as the leading zeros are lost when pasting into Excel. There are some work arounds to overcome this problem such as putting a letter in front off the Activity ID before copying from SureTrak or formatting the Excel Activity ID column as Text before pasting.

4.4 P3 MPX Conversion

This is the P3 menu conversion utility to convert both ways, P3 to MPX and MPX to P3, but does not provide the flexibility of PIPE.

5 NOTES ON IMPORTING A STATED MPX PROJECT INTO P3/SURETRAK

Importing MPX files is always difficult, especially when the project have been stasured:

- When converting from MPP to MPP (98) all tasks which have been assigned a task calendar in MPP format will have the Project Calendar assigned to tasks in MPP (98) format. This is because MSP (98) and MPX do not support task calendars. Therefore before converting from MPP to MPP(98) you should note any task calendar in a text column 1 to 10, and this will be converted to an activity code in P3 and SureTrak and correct calendar may be reassigned after conversion. The calendars are converted and will be available in P3 and SureTrak
- Ensure that all Actual start dates in MSP which are before the Data Date are marked as Started. (MSP allows activities in the past that have not started).
- It is recommended that you enter your P3 Activity Codes in MSP Text columns 1 to 10 before you import the file. These are often adopted from the Outline levels.
- Never import an MPX file into a project that is part of a Project Group, as it will delete/overwrite all your activity codes.
- It is recommended that you remove all Topic Activities by promoting ALL activities to Outline Level 1 and deleting redundant Parent Activities. You will need to check that all logic is at the lowest Outline Level before promoting activities
- After an MPX file is imported you may wish to change the Milestones which are imported as Start Milestones to Finish Milestones, (don't forget to change predecessors from FS to FF).
- MPX Milestones with finish constraints, are converted as Start Milestones and do not recognise the Finish constraints which are greyed out in the SureTrak constraints form. Change the Milestones from Start to Finish and they will then acknowledge the imported finish milestones.

There are many other issues involved with importing a MS Project file, especially when importing resources. You may need to rename your resources in MS Project and then re-import the file to achieve your desired result. In MPX and MS Project 98 calendars may only be placed against resources, you may wish to place calendars against activities after importing.

6 NOTES ON CONVERTING FROM SURETRAK/P3 TO MPX

To convert a project from SureTrak to MS Project in principal all that has to be done is to select File, Save As and under file type select MPX, this will save the file as MPX format which most scheduling packages will open, including MS Project and SureTrak.

There are a few issues for the uninitiated:

- SureTrak calculates differently and so the same data may calculate different dates in MS Project than SureTrak.
- Due to calendar conversion issues a SureTrak discussed earlier, a schedule with only one calendar converts better than a multiple calendar schedule.
- Levelled schedules are calculated completely differently in MS Project.
- In progress tasks in MP Project are calculated differently in MS Project. SureTrak calculation of in progress activities is in my opinion (and most professional schedulers) is far better than MS Project. If a SureTrak has Unlink Remaining Duration & Percent Complete switched on MS Project will not recognise this facility.
- MS Project does not allow activities with two relationships to another activity, as in SureTrak and this may cause import errors.
- MS Project does not recognise SureTrak Suspend & Resume.
- SureTrak Renames the Global Calendar as “Standard” when saving as a MPX. You should avoid using the name Standard for any calendar in SureTrak if you intend to convert it to MSP.
- I normally conduct the following tasks before saving a SureTrak file as a MPX:
 - Set the Target Dates in SureTrak using Define, Target Dates, thus when you open the schedule in MS Project the Baseline Dates are what the schedule should calculate to.
 - Rename the calendar that is assigned to the activities as any other name but "Standard".
 - Open the schedule in MS Project, re calculate and compare the Baseline Dates to the schedule dates.

You will find the SureTrak Activity Codes will appear in Text 1 to Text 10 in MS Project. In MS Project 2000 the Grouping facility (not available in earlier versions) may be used to Group on these text columns sort of emulate the SureTrak Organise, but it will only have the codes to work on, no ordering or titles are available, not at all satisfactory.