Sharing Primavera P6 Data with Non-P6 Users using MS Excel

Business Challenges:

- Distribution of project data to non-Primavera P6 users
- Reduce data entry in project control systems

Primavera users can easily share project data entered into the P6 thick-client or what is known as P6 Professional with other software applications using Microsoft Excel. Users can even import Primavera P3 and Microsoft Project files in P6 Professional to enable project collaboration. This Skill Brief will focus on exporting data to MS Excel.

Some of the benefits of importing P6 data into Excel include:

- Refined graphical reporting and analytics can be performed in Excel. Users can create the basis for a schedule of values in P6 then import it into Excel for finalization with things such as calculation columns and logos.
- Search and replace functions can be used on data exported to Excel. Data can then be imported back into P6.
- Excel can be used as an interface with other third-party applications such as estimating, HR or financial systems. As an example, estimates can be created in other applications an imported back into P6 to reduce project creation time in P6.
- Project updates can be performed using Excel. Project data to be updated on a periodic basis can exported from P6 into Excel. The data can then be updated by field staff. The data can then be validated then imported back into P6.

How can data be exported from P6? There are two ways. An Excel Wizard is used to guide users through the process or a layout can be created. The displayed columns can then be exported to Excel. To use the Excel Wizard, follow these simple instructions:
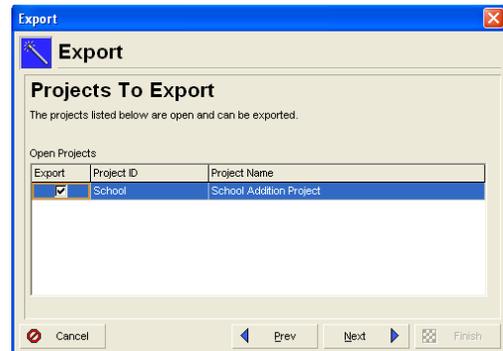
1. Select File | Export and choose Spreadsheet as the export format
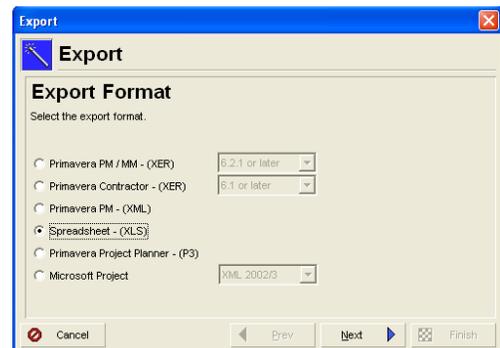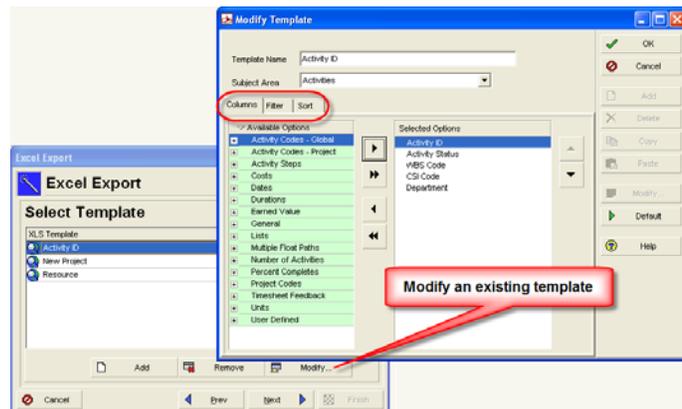

2. Choose the type of data to be exported
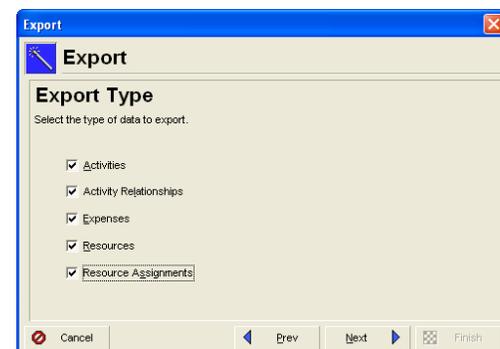
3. Select the project to export. Only open projects will be displayed.

4. Select the columns, filters and sort criteria for each subject area. Modify and existing template if needed.

5. Select a location to save the newly created XLS file. The wizard will assign the Project ID as the file name. You can change it if necessary. If you are exporting multiple projects using the wizard, separate Excel spreadsheet files are created for each project.
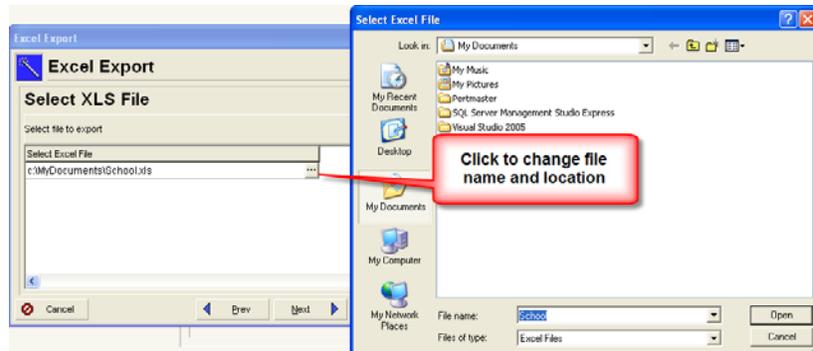
6. At the end of the Excel Wizard, you can review the summary information for the export file.

Some guideline to be aware of when exporting to Excel using the Excel Wizard:

- Each subject area is exported as a separate worksheet
- When pushing data back into P6 – such as units, costs, durations, percent complete fields – import one update field type at a time.
- In Excel, to delete a row of data when importing back to P6, type a "D" or "d" in the "Delete This Row" column.
- Do not edit the information on the USERDATA worksheet.
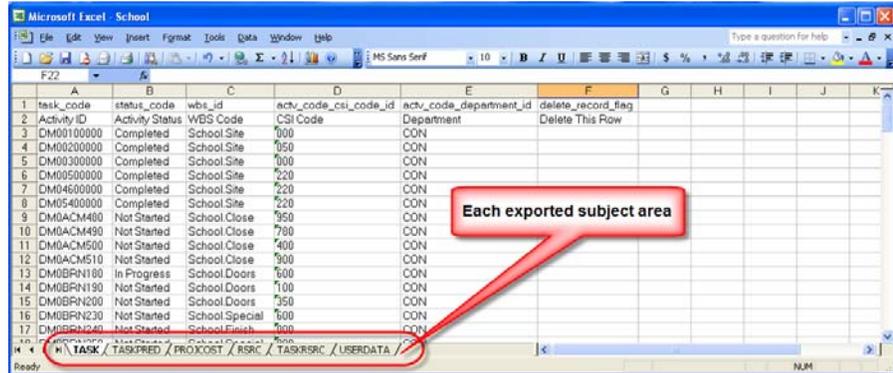
Exporting project layouts is somewhat easier than using the Excel Wizard. Right-click in the Activity Table via the Activity window and select "Export to Excel" to easily export the displayed columns to an Excel Spreadsheet.
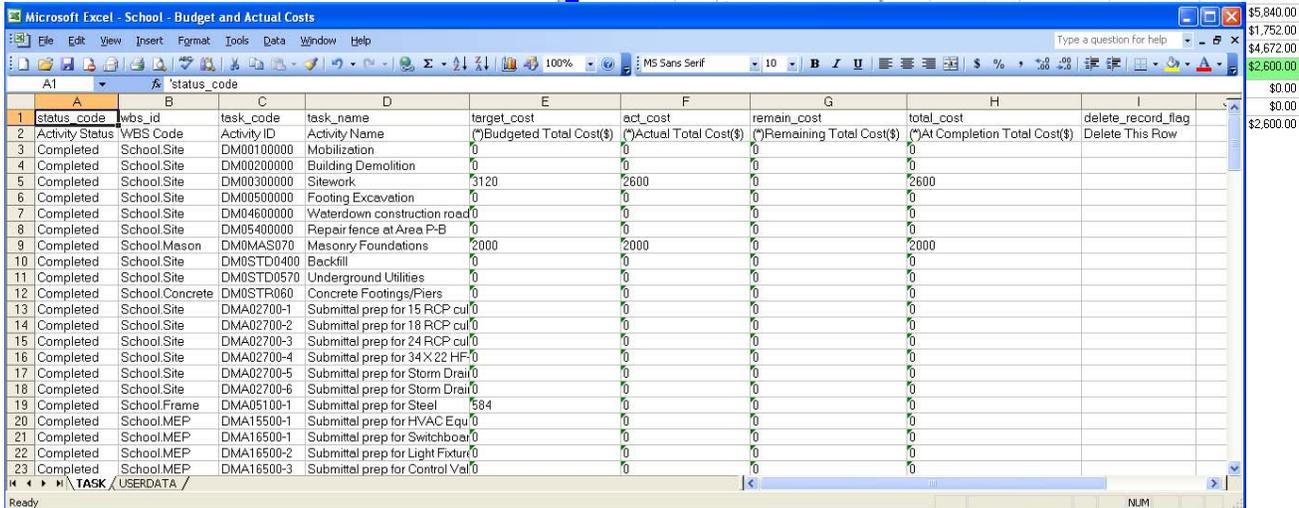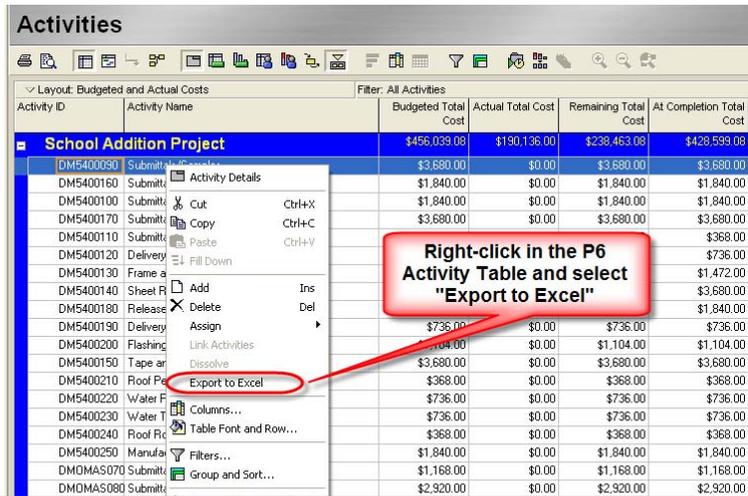
This Skill Brief is an introduction to the capabilities of MS Excel functionality in Primavera P6. This functionality enables users to export data via MS Excel to other systems, pivot data within MS Excel or modify data via an MS Excel spreadsheet and import it back to Primavera P6 Professional. If importing data back to P6 Professional, it is strongly advised that this process be prototyped on test projects before rolling it out into a production environment.