SPERT® Scheduler — Import from P6 or MS Project

User Guide

Bring a Primavera P6 or Microsoft Project schedule into SPERT® Scheduler · Settings → Import Activities from Spreadsheet

SPERT® Scheduler can't open P6 or MS Project files, but both tools copy cleanly into Excel. Scheduler then imports the sheet: one row per activity, each with a three-point estimate. For a schedule with thousands of activities, import a summary of about 100 rows; Scheduler holds up to 500 per scenario.

WHAT SCHEDULER NEEDS

Row 1 of the sheet must hold these headings, in any order. Scheduler ignores capitals and spaces in a heading, and skips any column it doesn't know.

Heading in row 1	Required	What goes in it	From MS Project	From P6
Activity ID	Yes	A unique ID per row; predecessors refer to it	ID (Scheduler accepts that heading as it is)	Activity ID
Activity Name	Yes	Up to 200 characters	Task Name, renamed	Activity Name
Optimistic (Min)	Yes	Whole working days, not above Most Likely	You add it	You add it
Most Likely	Yes	Whole working days	Duration, as a number	Original Duration, in days
Pessimistic (Max)	Yes	Whole working days, not below Most Likely	You add it	You add it
Confidence Level	The column, yes	A level on T-Normal, LogNormal and Beta-PERT rows; may be blank on Triangular rows	You add it	You add it
Predecessors	No	IDs separated by commas, each with an optional lag (+3) or lead (-2) in working days	Predecessors	Predecessors
Distribution	No	normal, logNormal, betaPert, triangular or uniform; blank means Triangular	You add it	You add it
Status	No	planned, In Progress or Complete; blank takes it from the dates	Leave it out: the dates set it	Activity Status
Actual Start	No	The day work began	Actual Start (NA means none)	Actual Start
Actual Finish	No	The day work finished	Actual Finish	Actual Finish
Planned Start, Planned Finish	No	Kept only for an activity that has started	None (Baseline Start and Finish are not read)	Planned Start, Planned Finish

Four rules catch most first attempts:

- Durations must be whole numbers. Scheduler refuses “5 days”, “5d” and 2.5.
- An ID named in Predecessors may hold only letters, digits and underscores. Change `A-100` or `1.2.3` to `A_100` or `1_2_3`, in both columns. A hyphen reads as a lead, so in a sheet with activities `1` and `1-2`, the link `1-2` goes to activity `1` without any error.
- Every imported link is Finish-to-Start. After import, click a link in the project's Dependencies panel to make it Start-to-Start or Finish-to-Finish. Scheduler has no Start-to-Finish.
- A scenario holds up to 500 activities and 2,000 links.

Milestones take a day. A P6 or MS Project milestone has no duration, so it imports as 0, 0, 0. Scheduler gives every activity at least one working day, so each milestone on a path adds a day to the finish. Zero-length milestones are on Scheduler's roadmap. Until then, a milestone whose links in and out are all Finish-to-Start can be left out. Link its predecessors straight to its successors, adding any lags together. Keep any other milestone, and allow for its day. Scheduler's own Milestones panel is something else: a target date with activities assigned to it.

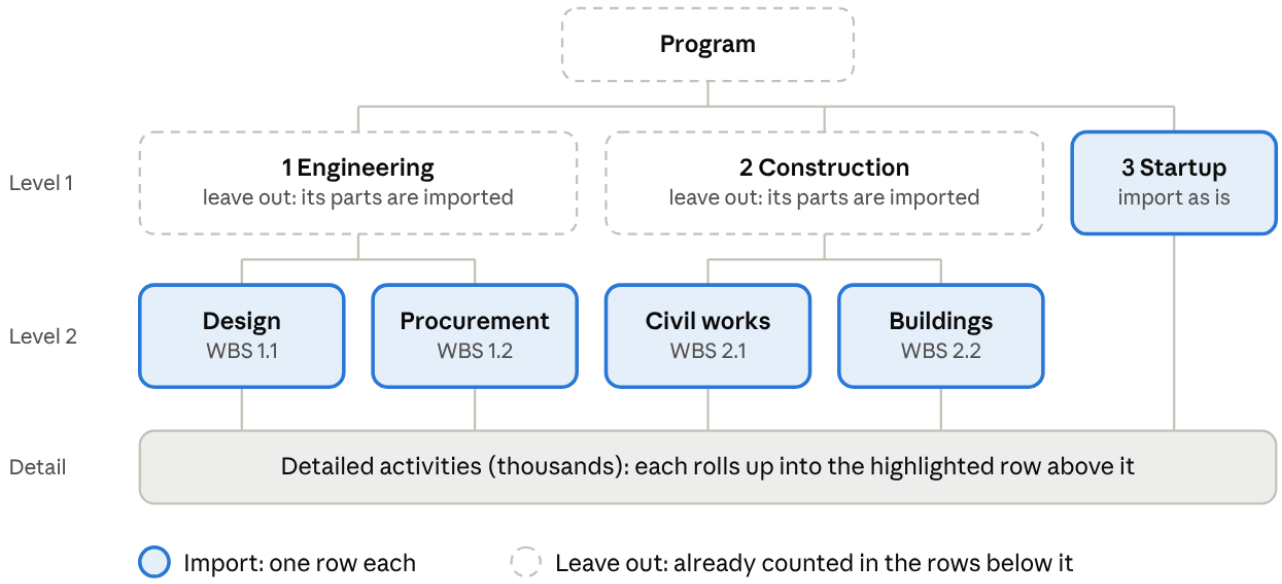
One calendar. Scheduler runs every activity on one work week. An activity from a 7-day calendar keeps its day count but works only on that week, so it stretches by about 7/5. Convert hours to days with each activity's own hours per day: 800 hours on a 24-hour calendar is 33 days, not 100. P6 measures a lag on the calendar its schedule options name; 56 hours on a 24-hour calendar is +2.

CHOOSE THE LEVEL OF DETAIL

For a schedule of more than a few hundred activities, import a summary: one row per WBS element or summary task, about 100 rows in all. That keeps the main paths, and leaves few enough rows to estimate each one with care.

- If the program keeps a Level 2 or other summary schedule, start from it. It already has summary-level logic.
- Otherwise pick one level of the WBS or outline, the one that gives about 100 rows. Import every row at that level, plus any branch that stops above it.
- Never import a summary together with its own subtasks. The same work would be counted twice.
- Use each summary's rolled-up duration as Most Likely: the working days from its earliest start to its latest finish.
- Links between detailed activities don't roll up, and summary tasks rarely carry links of their own. Type the logic between your summary rows by hand, using their IDs.
- Keep parallel paths as separate rows. Folding two paths into one row hides the point where they merge, and merges are where schedules slip.

Import one level of the WBS, never a summary with its own subtasks



Here the four Level 2 elements, plus Startup with no Level 2 below it, become five rows. Engineering and Construction stay out, because their parts are already in.

Before you estimate, leave out rows that aren't work:

- Level-of-effort and hammock activities. They span other work, and can set the finish on their own.
- Template placeholders and reference rows, such as an activity that only carries a calendar.

In MassDOT's public P6 template, 24 of the 145 activities were placeholders, reference rows or level-of-effort. Constraints, resources and resource leveling don't come across in the import.

A PROJECT ALREADY UNDERWAY

Scheduler reads progress from the date columns, so a project underway comes across as it stands.

- Copy Actual Start and Actual Finish, and from P6 Activity Status too. An activity with both dates imports as done; one with only an Actual Start imports as started on that day.
- Keep the finished activities. Their successors need them, and they no longer count as work to do.
- Most Likely stays the whole duration (Original or At Completion), not Remaining Duration. Scheduler counts the working days since the Actual Start.
- Planned Start and Planned Finish are kept for activities that have started. For the rest, Scheduler keeps its own when each one starts.
- The new scenario starts on the earliest Actual Start, and work that hasn't started is scheduled no earlier than today. Leave Start as the import sets it.

MICROSOFT PROJECT, STEP BY STEP

These steps use the ribbon of Project 2013 and later. Copying with headings needs Project 2010 or later.

1 Open the schedule in the Gantt Chart view and show every task: View → Outline → All Subtasks.

2 Make the table show ID, Task Name, Duration and Predecessors (right-click a column heading → Insert Column). For a summary import, add Outline Level too.

— For a project already underway, add Actual Start and Actual Finish, keep Duration, and keep every task (no Incomplete Tasks filter). See A project already underway.

3 Click the blank box at the top-left corner of the table to select every row and column. Copy, then paste into an empty Excel sheet. The column headings come with it.

4 Delete the project summary task (ID 0) if it came across. Rename Task Name to Activity Name; ID and Predecessors keep their headings.

5 Add a column headed Most Likely that turns the Duration text into whole days. With Duration in column C, fill this down:

```
=ROUND(VALUE(TRIM(SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(C2,"?",""),"days",""),"day",""))),0)
```

— It reads durations shown in days (“5 days”, “1 day”, “3 days?”). Convert any row shown in weeks, hours or elapsed days by hand.

6 Rewrite lags in Predecessors. Plain finish-to-start links (`3`, or `3,7`) work as they are; `3FS+2 days` becomes `3+2`, and `3FS-1 day` becomes `3-1`.

— With Predecessors in column D, this does it for the whole column:

```
=SUBSTITUTE(SUBSTITUTE(SUBSTITUTE(D2,"FS",""),"  days",""),"  day","")
```

— Start-to-Start and Finish-to-Finish links (`3SS`, `5FF+2 days`) are flagged in Scheduler's preview. Enter them as `3` or `5+2`, and change their type after import.

7 For a summary import, filter Outline Level to the level you chose, plus any shallower task with no subtasks, and copy the visible rows to a new sheet. Clear its Predecessors column and type the summary logic, using the IDs of the rows you kept.

8 Go on to Add Min, Max and Confidence.

PRIMAVERA P6, STEP BY STEP

These steps use P6 Professional's menus, which can differ slightly between versions.

1 Show durations in days: Edit → User Preferences → Time Units, and set Durations Format to Day.

2 In the Activities window, show Activity ID, Activity Name, Original Duration and Predecessors (View → Columns; Predecessors is in the Lists group).

— For a project already underway, add Activity Status, Actual Start, Actual Finish, Planned Start and Planned Finish, keep Original Duration, and keep completed activities. See A project already underway.

3 Click an activity, choose Edit → Select All, then right-click the selection and choose Copy. Paste into an empty Excel sheet. If the column titles don't come across, type them into row 1.

4 Rename Original Duration to Most Likely. Activity ID, Activity Name and Predecessors already match.

5 If durations show a unit or decimals (`10d`, `2.5d`), add a Most Likely column that strips them. With the duration in column C, fill this down:

```
=ROUND(VALUE(SUBSTITUTE(C2,"d","")),0)
```

6 If an Activity ID holds a hyphen, dot, space or slash, select the Activity ID and Predecessors columns and replace that character with an underscore (Ctrl+H). Delete predecessors that belong to other projects.

7 Check relationship types. The Predecessors column lists IDs only, so every link imports as finish-to-start with no lag.

- If the schedule relies on Start-to-Start, Finish-to-Finish or lags, add the Predecessor Details column (P6 16.1 and later) to see them. Scheduler skips a column headed Predecessor Details without a message, so copy its links into Predecessors.
- Write lags and leads into the Predecessors cell (`A1010+5`), and change link types after import.

8 For a summary import, build the rows yourself: WBS elements are not activities, so they don't copy. Group the Activities window by WBS, collapse it to the level you chose, and type one row per WBS band: an ID (its WBS code with underscores, such as `1_2`), its name, and its rolled-up Original Duration as Most Likely. Then type the logic between those rows.

- If the schedule has WBS Summary activities, filter on Activity Type and copy those instead. Each already spans its WBS element.

9 Go on to Add Min, Max and Confidence.

ADD MIN, MAX AND CONFIDENCE

P6 and MS Project keep one duration per activity. Scheduler needs three, and the two you add are where the risk comes from.

1 Keep the P6 or MS Project duration as Most Likely.

2 Add Optimistic (Min) and Pessimistic (Max): the best and worst realistic outcome for each row, ideally from the people doing the work.

3 For a first pass, fill both by formula, with Most Likely in column E:

```
Optimistic (Min):  =ROUND(E2*0.75,0)
Pessimistic (Max): =ROUND(E2*2,0)
```

- 75% and 200% are Scheduler's own heuristic defaults. Settings → Preferences → Select domain… suggests percentages for 73 kinds of work; Civil & Infrastructure construction, for example, uses 70% and 275%.

4 Then revise the rows that drive the finish date. One percentage applied to every row makes the simulation mostly a picture of that percentage.

5 Keep a Confidence Level column even if it stays empty. With Distribution blank, every row is Triangular and needs no level.

- To let your confidence in each Most Likely set its spread, as Statistical PERT® does, enter `normal` (T-Normal), `betaPert` (Beta-PERT) or `logNormal` under Distribution. Then give each row a level: Near Certainty, Very High, High, Medium High, Medium, Medium Low, Low, Very Low, Extremely Low or Guesstimate.

IMPORT INTO SCHEDULER

1 In Excel, select the sheet from the heading row down and copy it. Columns Scheduler doesn't know can come along; it skips them.

- Sort the rows by start date first. Copy the Start column along and sort by it; Scheduler keeps the rows in that order and skips the Start column. The Gantt's links then point downward.
- To trace a row back later, begin its Activity Name with its P6 or MS Project ID. Scheduler uses the Activity ID to connect links and doesn't keep it.

2 Open SPERT® Scheduler, go to Settings, and scroll to Import Activities from Spreadsheet, the last section. Paste into the box under “Or paste from spreadsheet:”.

- Or save the sheet as CSV UTF-8 and use Choose CSV File.

3 Read the preview. It counts activities, dependencies, errors and warnings, and names each row with a problem. Fix errors in Excel and paste again; warnings don't block the import.

4	Under Commit Settings, name the scenario, keep Create new project (or pick an existing project to add a scenario to it), and click Import Activities. — Dependency Mode comes on by itself when any row has predecessors.
5	Click the Open link in the green box. For a project that hasn't started, set Start on the summary card to its start date: the import starts it today. For a project underway, leave Start as the import set it, on the earliest Actual Start.
6	Match your P6 or MS Project calendar: Settings → Preferences → Work Days for the work week, and the Calendar page for holidays. — Every activity runs on that one work week; see One calendar, above.
7	Click Run Simulation. — On a crowded Gantt, clear the Arrows box to hide the links.

Check the conversion before trusting the result. Import a copy of the sheet with Min, Most Likely and Max all equal to the P6 or MS Project duration. With no uncertainty, Scheduler's Finish w/o Buffer should land on or near your P6 or MS Project finish date. If it doesn't, look for Start-to-Start or Finish-to-Finish links that became finish-to-start, milestones on the critical path (a day each), activities from 7-day or 24-hour calendars, a different work week or holidays, constraints and resource leveling that Scheduler doesn't import, or, for a project underway, a P6 data date other than today (Scheduler starts work that hasn't begun no earlier than today). Then import your real estimates into the same project as a second scenario, and use Compare to see the two side by side. Keep everything but the estimates the same: rows, links with their types and lags, milestones, start date and calendar. Expect the second finish to land later: Scheduler schedules each activity at its Activity Target, P50 by default, which sits above Most Likely when Max is further from it than Min.

USING AN AI ASSISTANT

An AI assistant can do the conversion for you. Give it this guide and your schedule exported as a file: a P6 XER, or MS Project XML. Ask it for the import sheet, then run the conversion check above. Through Connect AI, it can also read activities' recorded dates in Read Mode, and set link types after import. Check its work on milestones, calendars and link types, where conversions most often go wrong.

IF THE PREVIEW SHOWS AN ERROR

Each message names its row. Fix the sheet in Excel and paste again; nothing is saved until you click Import Activities.

The preview says	What to do
Missing required column: Confidence Level.	Add a column headed Confidence Level. It can stay empty on Triangular rows.
Missing required columns: Activity Name, Most Likely.	Row 1 needs Scheduler's headings: rename Task Name to Activity Name, and add Most Likely.
No recognizable header row found.	Copy from the heading row down, not from the first activity.
Most Likely must be a non-negative integer, got "5 days".	Turn durations into whole numbers with the formula for your tool.
Optimistic (Min) is above Most Likely. Or: Most Likely is above Pessimistic (Max).	Rounding or a formula broke the order on that row. Each row needs Min ≤ Most Likely ≤ Max.
Invalid predecessor token "3FS+2 days". Expected format: A1 or A1+3 or A1-2.	Rewrite the link in Scheduler's form: 3+2. Enter a Start-to-Start or Finish-to-Finish link the same way, and change its type after import.

The preview says	What to do
Predecessor "3SS" not found. Check the Activity ID.	A link type is still on the ID: enter 3, and change the type after import. The same message appears when a hyphenated ID (`A-100`) is read as A, or when the row it names wasn't imported.
Dependency cycle detected: …	The logic loops. The message lists the rows in the loop; remove one of its links.
Import contains more than 500 activities. The maximum per scenario is 500.	Import a summary instead (see Choose the level of detail).
Activity ID "1-Mar" looks like an Excel-converted date. Check your spreadsheet.	A warning: Excel turned an ID into a date. Format the column as Text and type those IDs again.
Actual Start "…" is after today. Or: Actual Start "…", read as MM/DD/YYYY (…), is after today.	Check the date, and the order it was read in when the message names one (Settings → Preferences → Date Format). An actual date can't be in the future.
Actual Start "46083" is a number, not a date.	Format the column as a date in Excel, and copy it again.

SOURCES

Scheduler's import rules are as of version 0.83.0. Its import template and import guide (PDF) are also linked from the Import Activities section.

- Lists Columns of the Activity Table (Oracle P6 help): what Predecessor Details shows.
- Primavera P6 Professional new column types (Tensix): Predecessor Details arrived in P6 16.1, in the Lists group.
- Transfer a P6 schedule to Excel (Tensix): Select All and Copy, which takes only the visible columns.
- Primavera P6 time units (Tensix): where Durations Format is set.
- Project 2010: Copy and Paste (Microsoft): column headings carried into Office apps.