

# TECH TIP

## DIFFERENCES BETWEEN IMPORTING P6 .XER AND .XML FILES ORACLE PRIMAVERA P6 PROFESSIONAL

When a user imports files into Primavera P6, it is necessary to understand the type of information is being brought into the database. An .XER file is a standard Primavera P6 export file that allows users to transfer project files between applications and databases. An .XML file can also be used as a reliable import file providing more import functionality options. An .XML file import is also another method for exporting and importing Microsoft Project files.

In	Import 💌								
	K Import								
	Import Format								
	Select the import format.								
	Primavera PM - (XER)     Primavera P6 - (XML)								
	C Spreadsheet - (XLS)								
	C Primavera Project Planner - (P3)								
	C Microsoft Project XML								
	⊘ Cancel								

Figure 1: Choosing the correct import format

#### DIFFERENCES BETWEEN IMPORTING P6 .XER AND .XML FILES

Below is a screenshot where you can modify what data gets brought into your P6 database, whether it is "Project Specific" data or "Global" data. This is located in the "Import" utility

mport	nport
	ate Project Options
take whe	nfigurations of update options may be saved and reused. These define the action to n imported data (e.g., resources, activities) conflict with existing data. Please choose out configuration to use during the import. You may also Add, Remove or Modify a
Use	Layout Name
Use Q Yes	

Figure 2: Choose "Modify" when importing a file



## DIFFERENCES BETWEEN IMPORTING P6 .XER AND .XML FILES

The options below are available when importing an .XER file. User-Defined Fields, Global Calendars and other global data types are not included in this list, therefore will be imported automatically from one database to another without restriction.

Modify the selected configuration by choosin exists in the import file and project being upda Check Delete to delete those values in the da	ated.		Cancel
you are importing.			Help
Data Type	Action	Delete	
Data Type: Activity			
Activities	Update Existing		
Activity Relationships	Update Existing		
🕵 Activity Resource Assignments	Update Existing		
Data Type: Global			
🕵 Resource Codes	Keep Existing		
🕵 Resource Code Values	Keep Existing		
😥 Risk Categories	Keep Existing		
Q Roles	Keep Existing		
2 Resources	Keep Existing		
🙀 Shift Names	Keep Existing		
Data Type: Project			
Res Activity Code Values	Update Existing		
Kactivity Codes	Update Existing		
alendars	Keep Existing		
Work Products and Documents	Update Existing		
Relationships to External Projects	Update Existing		
Project Expenses	Update Existing		
Projects	Update Existing		
👜 Project Funding Assignments	Update Existing		
Issues	Update Existing		
Project Code Assignments	Update Existing		
💡 Risks	Update Existing		
	Update Existing		
📕 WBS	Update Existing 💌		
	Do Not Import		

Figure 3: A .XER import configurations options



## DIFFERENCES BETWEEN IMPORTING P6 .XER AND .XML FILES

Below are the options available for .XML type files. There are more substantial options to modify global import capablities within this configuration than in the .XER configuration utility.

0	Modify	/ Import Configuration				
Γ	Modify t	<ul> <li>Image: A second s</li></ul>	ок			
	exists in the import file and project being updated.					Cancel
	Check D	0	Gancer			
	you are importing.					Help
	Data Typ	e.	Action	Delete	<b>?</b>	пер
		)ata Type: Global		201010		
		Cost Accounts	Keep Existing			
		Global/EPS Activity Codes and Values				
		Global/Resource Calendars	Keep Existing			
		Funding Sources	Keep Existing			
	6	Project Codes and Values	Keep Existing			
	ſ	Admin categories	Keep Existing			
	1 🐑	Resource Codes and Values	Keep Existing			
	0	Risk Categories	Keep Existing			
	<u> </u>	Roles	Keep Existing			
	2	Resources	Keep Existing			
	6	Resource Curves	Keep Existing			
		Shift Names	Keep Existing			
		User Defined Fields	Keep Existing			
	= C	Data Type: Project				
		Project Activity Codes and Values	Update Existing			
	<u> </u>	Project Calendars	Keep Existing			
		Activity Expenses	Update Existing			
	•	Issues	Update Existing			
	6	Risks	Update Existing			
	-	Thresholds	Update Existing			
		WBS	Update Existing			
		Activities and Resource Assignments	Update Existing			
		Activity Relationships	Update Existing			
			Do Not Import	9		
			Keep Existing Update Existing			
			opolic Existing	1		
Ľ						

Figure 4: A .XML Import Configuration Options

