Primavera P6 Enterprise Project Portfolio Management

Importing and Exporting Guide

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Primavera P6 Enterprise Project Portfolio Management Importing and Exporting Guide,

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Primary Author: Oracle Corporation

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Importing Views 2

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About This Guide

Scope

This guide contains information about import and export formats and the process of importing and exporting data.

Audience

Administrators should read this guide.

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About Importing and Exporting Data

Import/Export features allow you to bring data into P6 as well as export data to other tools when needed. Global and Project level privileges control the ability to import and export data.

When you export projects to XML or XER format, P6 adds a SHA-256 checksum to the exported files. P6 validates the checksum during import to detect files that might have changed or been damaged after export. If the checksum doesn't match on import, P6 will stop the import, warn you that the file might have changed or been damaged, and ask whether you still want to import the file.

Available Import Options:

- Import projects from other P6 EPPM users or Microsoft Project
- Import multiple projects in a single XML or XER file
- Import multiple projects in a single XML file contained within a single zip file
- Import activities
- Import resources
- Import locations
- Import appointments as personal non-work exception time from Microsoft Outlook and other applications that support the iCalendar format
- Move activity codes and calendars to projects
- Remove codes, UDFs, and calendars from projects
- Rename codes, UDFs, and calendars
- Specify resource hierarchical position for importing into the resource breakdown structure
- Map resources to generic resource names
- Save import options in a template
- Import views
- Import enterprise data

Available Export Options:

- Export projects
- Export multiple projects in a single XML or XER file
- Export multiple projects in a single zip file containing a single XML or XER file
- Export baselines
- Export activities
- Export resources
- Export resource allocation and cost
- Export risks

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- Export views
- Export enterprise data

> **Note**
>
> For best practices on exporting data from P6 EPPM to be imported into Oracle Primavera Cloud, see: *Primavera Cloud P6 EPPM XML Import Guide.*

Import Settings

The import template has two groups of settings that determine how data is imported.

Import Action on the Basic Tab of the Import Template

The Import Action on the Basic tab of the import template determines how to handle the import of each type of data when a match is found between data in the import file and data in the database. P6 EPPM looks for a match on the basis of a single field (usually the ID but sometimes the name).

For example, you can specify that you do not want to import any Resources or Roles, but you do want to import Calendars and Codes.

> **Note**
>
> The same templates are available for import from XER and XML. However, there are certain options that differ between the two file formats. If you select Insert new in an XER import version of the template for the following data types, the XML import version of the template will have these data items set to Update existing:
>
> - Activities and Resource Assignments
> - Expenses
> - Issues
> - Project Data
> - Project Thresholds
> - Risks
> - Work Products and Documents

For each data type listed, you can choose from the following import actions:

- **Insert New** leaves matching data in your database unchanged and adds all the data of the associated data type from the import file to your database as new data items.
  Use the Insert New action if you do not want to change your existing data of the associated type, but you still want to import the matching data from the import file. When you use this import action, the existing data in your database will remain unchanged, but new data items will be created for each data item of the selected type in the import file, even if the items in the data file have an exact match in your database.

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- **Keep Existing** leaves matching data items in your database unchanged. If there is data in the import file that does not have a match in your database, that data will be added to your database.
  Use the Keep Existing import action if you don't want the data of the associated type in your database to be changed but you want to make sure that you add new data items of that type to your database from the import file.
- **Update Existing** overwrites matching data of the associated data type in your database with data from the import file.
  Use the Update Existing action if it is important that your data conforms to the data in the originating database.
- **Convert to Project** converts EPS level activity codes to project level activity codes. This option is available only for XER import and only for the EPS Activity Codes and EPS Activity Code Values objects. Unlike EPS level activity codes project level activity codes cannot be secure, therefore if you select this import action, secure EPS level activity codes will not be imported.
  Use the Convert to Project action if you want to import and assign EPS level activity code data.

> **Note**
>
> The structure of an XER file doesn't include information about the EPS node the projects were exported from. Therefore it is not possible to import EPS level activity codes as EPS level codes, even if an XER file is being imported back into its origin database. If you need to import EPS level activity codes as EPS level activity codes, Oracle recommends exporting the project as an XML file.

- **Do Not Import** leaves matching data of the associated data type in your database unchanged and does not import new data from the import file.
  Use the Do Not Import import action for a data type if you do not want to change that type of data in your database at all as a result of importing.

Action on the Advanced Tab of the Import Template

The Action on the Advanced tab of the import template allows you to limit exactly which Codes, User Defined Fields (UDFs), and Calendars are imported from a file. For example, here you can specify that you do not want to import any global activity codes and their values, you want to update existing EPS specific activity codes and their values, and that you want to import assignments and values of the Phase activity code, but not the Status activity code.

For each Code, UDF, and Calendar, you can choose from the following actions:

- **Do Not Import** leaves matching data of the associated item in your database unchanged and does not import new data from the import file. This option overrides the import action for that data type selected on the Basic tab of the import template.
- **Keep** will import the data of the associated item according to the import action for that data type selected on the Basic tab of the import template.

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> **Note**
>
> For secure codes, this action applies only to the security status of the code (that is, whether the code is secure or unsecured). Do Not Import is used to prevent a code being upgraded to a secure code if the matching code is secure in the import file. Keep is used to allow the code to be upgraded to secure if the matching code in the import file is secure. Importing a file will never change a secure code into an unsecured code.

Secure Codes

If you have the suitable permissions, you can control how secure codes are imported from Primavera XML files into your database. The information here assumes that the person importing the data has the add/delete, edit, assign, and view permissions for secure codes.

Unlike UDFs and calendars, for codes, the Action setting on the Advanced tab of the import tab controls only the security status of a code, that is, whether or not the code is secure. In situations where the security status of a code is the same in the import file as in the database, the code and its values are imported according to the import action selected on the basic tab for the data type and the action selected on the advanced tab for each code.

However if the security status of a code is different in the import file from the code in the database, further rules are applied.

Mismatch of Secure or Unsecured Status

When the security status of a code differs between the import file and your database, the rules used for importing depend on the import action for the data type and the action for the code.

> **Note**
>
> Importing a file will never change a secure code into an unsecured code.

When the import action for the data type is Insert New, Keep Existing, or Do Not import, neither the code's security status, nor other attributes of the code are imported, even if you have set the action for the code to Keep. This is because the rule used where a match is found in your database for Insert New, Keep Existing, and Do Not Import is not to update the matching data.

However, when the import action for the data type is Update Existing, the action you choose for each code determines how that code in your database will be updated. The table below summarizes the rules.

Status in Import File	Status in Database	Action	Update Code to Secure?	Update Other Attributes?
Unsecured	Secure	Do Not Import	No	No
Secure	Unsecured		No	Yes
Unsecured	Secure	Keep	No	Yes
Secure	Unsecured		Yes	Yes

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Calendars

When you import projects from a Primavera XML file, you can view the detailed definitions of calendars used in the project and those in the import file. You can then determine the appropriate import actions for Global Calendars and Resource Calendars, and specify whether to import each calendar included in the file on a case-by-case basis.

In the import template, the Calendars tab lists all the calendars used in the projects being imported. The list includes columns showing the following information about each calendar:

- Whether it is represented in the import file.
- Whether it exists in your database.
- Whether it has previously been added to the import template you are using.

From the calendar list, you can click to see more detailed information about any calendar. For calendars that exist in either the database, the import file, or both, you can view the summary, standard work hours, standard work week, and exceptions. If the calendar exists in both the database and the import file, you can switch between the two versions of the calendar to compare their definitions. Exceptions from both versions of the calendar are shown as a single list, allowing you to compare the two versions more easily. You can group the list of exceptions by source or date, or choose not to group the exception list at all.

After comparing the definitions of both versions of a calendar, you can make an informed decision about whether to import that calendar without change, rename it, or convert it to either a project or resource calendar. Renaming and converting calendars can help to prevent unintended changes to calendars being used widely across your database. You can choose whether to import, rename, or convert each of the calendars included in the import file on a case-by-case basis.

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3 Importing Projects using Primavera XML Format

You can import projects and baselines using the Primavera XML format and create or update a project.

> **Note**
>
> Avoid using the pipe character (|), or brackets (< or >) in the Project Name.

To import projects using Primavera XML format:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/ExportProject** dialog box, click the **Import** tab.
   c. On the **Import** tab:
      - In the **Import Type** list, select **Primavera XML**.
      - In the **File** field, click **Browse**.
   d. In the **File Upload** dialog box, select a file and click **Open**.
   e. On the **Import** tab:
      - Select a **Template** to use.

        > **Note**
        >
        > If you need to create a template or modify an existing template, click **Manage Templates**.

      - Select an option for **Import Action**.

        If you selected **Create New**, click **Select** in the **Import To** field and select the EPS where you want to import the XML file.

        If you selected **Update Existing**, click **Select** in the **Import To** field and select the project where you want to import the XML file.

      - Select which **Baselines** to import.

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> **Note**
>
> If you select to import with update existing and you select to import baselines, matching baselines will be updated with the data from the XML file according to the options in the selected template.

f. Click **Import**.

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Tip

- To understand how the import of secure codes is handled, see Secure Codes.
- You can see the status of the import in the **View Service Status** dialog box.
- You can import multiple projects as one file using Primavera XML format.
- You can import a Primavera XML file from within a zip file. If the zip file contains multiple XML files, only the file with the same name as the zip will be imported. If the zip contains only one XML file, the name of the zip and XML file need not match.
- You can update baselines when you import a project and its baselines from an XML file. When you select the Update Existing import action at the project level, matching baselines you import will be updated from the import file. Baselines you choose to import but which do not have a match in your database against the project you selected to update will be added to the project as baselines, but will not be assigned as the project, primary, secondary, or tertiary user baseline.
- The Activity Owner field shows the P6 EPPM user who owns the activity. If a Primavera XML file that includes the Activity Owner field is imported into a database, the Activity Owner data is imported only if the user already exists in the database.
- Stored performance data can be imported as long as the start and finish dates of periods match between the import file and the financial period calendar assigned to the project for all financial periods with data stored at the activity or assignment level.
- If the XML file was generated from a version earlier than release 20.4, when it is imported into release 20.4 or later rates for roles will be the same for all effective dates. If an XML file generated from release 20.4 or later is imported into a database with a version of 20.3 or earlier, only the rates which were effective at the time of export will be imported.
- If the currency stored in the XML file matches a currency in your database, you can select whether to import financial data using the base currency in your database or the currency present in the XML file. If you chose to use the XML rate, financial data is converted as follows:
- Cost imported = Cost in XML file * (Exchange rate in XML file / Exchange rate of the matching currency in your database)
- For example:
- Michelle Peterson in the London office exports a project to a Primavera XML file and sends the project file to her colleague Judy Billings in the Paris office. The XML file that Michelle generates, contains information about the view currency Michelle used and its exchange rate with the base currency in her database. When Judy receives the file, she imports it into her database using the option to import with the XML rate.
- Michelle's view currency is GB Pounds (£) and the base currency in her database is US Dollars ($). The exchange rate between GB Pounds and the base currency in Michelle's database is 0.79. Judy's database has a base currency of Euros (€), and the exchange rate between GB Pounds (£) and the base currency is 0.88.
- Costs are always stored in units of the base currency of the database. So to import the correct value in GB Pounds, P6 converts the costs in the XML file by multiplying by the exchange rate for GB Pounds in the XML file divided by the exchange rate for GB Pounds in Judy's database.

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- In Michelle's database, Activity A1000 has a planned cost of £1,000. The cost is stored in the database in the base currency of US Dollars as $1,265.82. The Primavera XML file contains the cost of the activity in the base units as well as information about the ID, name, and exchange rate for GB Pounds in Michelle's database. When Judy imports the file, P6 converts the cost of Activity A1000 as follows:
- $1,265.82 × (XML exchange rate / destination exchange rate)
- = $1,265.82 × (0.79 / 0.88) = €1,136.36
- When Judy changes her view currency to GB Pounds (£), the value stored in the database is converted to the view currency by multiplying by the exchange rate for the view currency, so:
- €1,136.36 × 0.88 = £1000.00

Viewing Calendar Details

You can view the details of calendars in a Primavera XML file prior to import. If a calendar in the import file matches one in your database, you can compare the definitions of the two calendars to allow you to make an informed decision about whether you want to import the calendar.

To view the details of calendars in an import file:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   - Click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/Export Project** dialog box, select the **Import** tab.
   a. On the **Import** tab:
      - In the **Import Type** list, select **Primavera XER**.
      - In the **File** field, click **Browse**.
   b. In the **File Upload** dialog box, select a file and click **Open**.
   c. Select **Manage Templates**.
4. In the **Manage Primavera Templates** dialog box, select the template you will use to import the file.
5. In the **Primavera Template** dialog box, select the **Advanced** tab.
6. On the **Advanced** tab, select the **Calendars** tab.
7. On the **Calendars** tab, in the Details column, select **View Calendar Details** for a calendar.
8. In the **Calendar Details** dialog box:
   a. On the **Summary** tab, view a list of the work period start and end times for each day of the standard work week, the time periods, and the base calendar (for project and resource calendars).

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If the calendar exists in the import file and the database, use the **Source** list to select the version of the calendar you want to view.

b. On the **Calendar** tab, view the work and non-work periods on a day-by-day basis.

   If the calendar exists in the import file and the database, use the **Source** list to select the version of the calendar you want to view.

c. On the **Standard Work Week** tab, view a visual representation of the work periods of a standard work week.

   If the calendar exists in the import file and the database, use the **Source** list to select the version of the calendar you want to view.

d. On the **Exceptions** tab, view a list of the exceptions that exist in the calendar. If the calendar exists in both the database and import file, all the exceptions from both versions of the calendar are listed here. You can group the exceptions by:

   - **Source**: To group the exceptions by whether they exist in the import file, the database, or both.
   - **Date**: To group the exceptions by month.
   - **None**: To show the exceptions without grouping.

9. Select **OK**.

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Exporting Projects using Primavera XML Format

You can export projects to locations outside P6 using the Primavera XML format to share project information between Project Management databases.

To export projects using Primavera XML format:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page, click the **Actions** menu and select **Import/Export Projects**.
3. In the **Import/ExportProject** dialog box, click the **Export** tab.
4. On the **Export** tab:
   a. In the **Export Type** field, select **Primavera XML**.
   b. Click **Add Project...**, and in the **Select Project** dialog box select the projects you want to export, then click **Select**.
   c. Optionally, on the **Select Baselines** list, select the baselines according to their assignment as project, primary, secondary, or tertiary baseline to export with projects as default.
   d. Optionally, select **Export to ZIP** to export a compressed file containing the XML file.
   e. Optionally, in the **Baselines** field for a project, click **Select** to open the Select Baselines dialog box, then customize which baselines you want to export with a the project.
   f. Click **Export**.

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Tip

- You can manage XER and XML import templates separately from the importing and exporting process using the **Manage Import Templates** option on the **Actions** menu of the EPS page.
- You can see the status of the import in the View Service Status dialog box.
- If you export projects using a scheduled service, use the Baselines column on the Project Settings tab of the service to select specific named baselines, the baseline assigned as the project baseline, and those assigned as the user's primary baselines that will be exported.
- To download the exported file, click the link in the View Service Status tab or Notifications dialog box.
- You can export multiple projects as one file using Primavera XML format.
- If you choose to customize the baselines to export with a project in the Select Baselines dialog box, those customizations over-ride the selections of baselines by assignment that you made in the Select Baselines list.
  For example, if you use the Select Baselines list to select the Project and Primary baselines by default, then for Project A you click **Select** and in the Select Baselines dialog box you clear the option to export Project A's Primary baseline, then when you export Project A, only the baseline assigned as the project baseline for Project A will be exported.

  Conversely, if you have customized the exact baselines to export with a project and then use the Select Baselines list to choose the baselines to export according to their assignment as project, primary, secondary, or tertiary baseline, those choices will override any selections of the relevant baseline made in the Select Baselines dialog box.

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Importing Projects using Primavera XER Format

You can import projects and baselines using P6 Professional's native Primavera XER format and create or update a project.

> **Note**
>
> - Avoid using the pipe character (|), or brackets (< or >) in the Project Name.
> - P6 and P6 Professional handle the import of XER files slightly differently.P6The XML import options in P6 have a few extra options when compared to the XML import options in P6 Professional (Document Categories, Document Statuses, Locations, and WP and Docs). However the import options for XER files in P6 Professional allow less configuration than the XML import options. Also, in P6 Professional only users with the Admin Superuser global security profile or Project Superuser project security profile can import projects, whereas any user with the appropriate permissions can import projects in P6.

To import projects using Primavera XER format:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/ExportProject** dialog box, click the **Import** tab.
   c. On the **Import** tab:
      - In the **Import Type** list, select **Primavera XER**.
      - In the **File** field, click **Browse**.
   d. In the **File Upload** dialog box, select a file and click **Open**.
   e. On the **Import** tab:
      - Select a **Template** to use.

        > **Note**
        >
        > If you need to create a template or modify an existing template, click **Manage Templates**.

      - Select an option for **Import Action**.

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If you selected **Add Into Existing Project**, click ••• **Select** in the **Import To** field and select the project or WBS node where you want to create a new child WBS to contain the imported project from the XER file.

If you selected **Create New**, click ••• **Select** in the **Import To** field and select the EPS where you want to import the XER file.

If you selected **Replace Existing**, click ••• **Select** in the **Import To** field and select the project you want to replace with the imported project from the XER file.

If you selected **Update Existing**, click ••• **Select** in the **Import To** field and select the project you want to update with the imported project from the XER file.

- Select which **Baselines** to import.

> **Note**
>
> If you select to import with update existing and you select to import baselines, matching baselines will be updated with the data from the XER file according to the options in the selected template.

f. Click **Import**.

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Tip

- If there is a matching project in the database, the import action will default to Update Existing and P6 shows the matching project in the Import To field. If there is no matching project, the import action defaults to Create New and P6 shows the first available EPS node in the Import To field.
- To understand how the import of secure codes is handled, see Secure Codes
- Risks in P6 Professional are stored in the ProjRisk table. ProjRisks are included in the XER file format and are imported from XER files into P6 EPPM, however ProjRisks are not visible in P6. If you need to import and export risk information, Oracle recommends you use XML format.
- You can see the status of the import in the **View Service Status** dialog box.
- You can import multiple projects as one file using Primavera XER format.
- You can update baseline when you import a project and its baselines from an XER file. When you select the Update Existing import action at the project level, matching baselines you import will be updated from the import file. Baselines you choose to import but which do not have a match in your database against the project you selected to update will be added to the project.
- The Activity Owner field shows the P6 EPPM user who owns the activity. If a Primavera XER file that includes the Activity Owner field is imported into a database, the Activity Owner data is imported only if the user already exists in the database.
- Stored performance data can be imported as long as the start and finish dates of periods match between the import file and the financial period calendar assigned to the project for all financial periods with data stored at the activity or assignment level.
- If the XER file was generated from a version earlier than release 20.4, when it is imported into release 20.4 or later rates for roles will be the same for all effective dates. If an XER file generated from release 20.4 or later is imported into a database with a version of 20.3 or earlier, only the rates which were effective at the time of export will be imported.

- The structure of an XER file doesn't include information about the EPS node the projects were exported from. Therefore it is not possible to import EPS level activity codes as EPS level codes, even if an XER file is being imported back into its origin database. If you export projects with EPS level activity codes to XER, when you import the XER file, the only import options you can choose for EPS Activity Codes and EPS Activity Code Values are Convert to Project or Ignore.

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Exporting Projects using Primavera XER

You can export projects to Primavera XER format to share them with P6 Professional.

To export projects using Primavera XER format:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/ExportProject** dialog box, click the **Export** tab.
   c. On the **Export** tab:
      - In the **Export Type** list select **Primavera XER**.
      - In the **Project** field, click **Select** and select a project to export.
      - In the **Template** list select a template to use.

        Note

        If you need to create a template or modify an existing template, click **Manage Templates**.

      - Click **Export**.

Tip

You can see the status of the import in the **View Service Status** dialog box.

Configuring Primavera XER Templates

Configure Primavera XER templates to define data exchange options for both exporting to and importing from P6 Professional.

To configure Primavera XER templates:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/Export Projects** dialog box, click the **Import** or **Export** tab.
   c. On the **Import** tab:

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- In the **Import Type** list, select **Primavera XER**.
- On the **Import** tab, click ••• **Browse** in the **File** field and select a Primavera XER file to import.
- Click **Manage Templates**.

d. Or on the **Export** tab:
   - Click **Manage Templates**.

e. In the **Manage Templates** dialog box, click a template.

f. In the **Modify Template** dialog box
   - Configure the lists, options, and fields on each tab.
   - Click **Save**.

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Importing Projects using Microsoft Project XML

You can import projects using the Microsoft Project XML format to create and manage them as new projects in P6.

> **Note**
>
> - To import a project via XML using P6 or P6 Professional, your user account's Resource Access field must be set to *All Resources*. This change can be made temporarily and then restored on the Users pane on the User Access page.
> - Avoid using the pipe character (|), or brackets (< or >) in the Project Name.

To import projects using the Microsoft Project XML format:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/ExportProject** dialog box, click the **Import** tab.
   c. On the **Import** tab:
      - In the **Import Type** list, select **Microsoft Project XML**.
   d. In the **File** field, click **Browse**.
   e. In the **File Upload** dialog box, select a file and click **Open**.
   f. On the **Import** tab:
      - Select a **Template** to use.

        > **Note**
        >
        > If you need to create a template or modify an existing template, click **Manage Templates**.

      - Select an option for **Action**.

        If you selected **Create New**, click **Select** in the **Import To** field and select the EPS where you want to import the XML file.

        If you selected **Update Existing Project**, click Select in the **Import To** field and select the project where you want to import the XML file.

      - Select an EPS to element in the **Import To** field.

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g. Click **Import**.

> **Tip**
>
> - You can see the status of the import in the **View Service Status** dialog box.
> - You can import multiple projects as one file using Microsoft Project XML format.

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Exporting Projects using Microsoft Project XML

You can export projects to locations outside of P6 using the Microsoft XML format to share information with Microsoft Project.

To export projects using Microsoft Project XML format:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/ExportProject** dialog box, click the **Export** tab.
   c. On the **Export** tab:
      - In the **Export Type** list select a Microsoft Project XML file type to export.
      - In the **Project** field, click **Select** and select a project to export.
      - In the **Template** list select a template to use.

        Note

        If you need to create a template or modify an existing template, click **Manage Templates**.

      - Click **Export**.

Tip

- You can see the status of the import in the **View Service Status** dialog box.
- The software automatically creates a UDF called MSP Activity ID the first time anyone exports a project to Microsoft Project format. This UDF is hidden and cannot be modified. You should avoid creating a UDF with that name.

Configuring Microsoft Project Templates

Configure Microsoft Project templates to define data exchange options for both exporting to and importing from Microsoft Project.

To configure Microsoft Project templates:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.

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2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/Export Projects** dialog box, click the **Import** or **Export** tab.
   c. On the **Import** tab:
      - In the **Import Type** list, select **Microsoft Project XML**.
      - On the **Import** tab, click **Browse** in the **File** field and select a Microsoft Project XML file to import.
      - Click **Manage Templates**.
   d. Or on the **Export** tab:
      - In the **Export Type** list, select a Microsoft Project XML file type to export.
      - Click **Manage Templates**.
   e. In the **Manage Templates** dialog box, click a template.
   f. In the **Modify Template** dialog box
      - Configure the lists, options, and fields on each tab.
      - Click **Save**.

Tip

The area you select from the **Select Subject Area** list on the **Custom Field Mapping** tab determines what appears in the **Project Management** and **Microsoft Project Fields**.

Note

Once data is exported from P6 into another project management tool, dates, durations and other data may no longer reflect those in P6 if the other project management tool recalculates this data.

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Exporting Projects using UN/CEFACT XML

You can export projects to locations outside of P6 using UN/CEFACT XML Format 6.

To export projects using UN/CEFACT XML Format 6:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/Export Project** dialog box, click the **Export** tab.
   c. On the **Export** tab:
      - In the **Export Type** field, select **UN/CEFACT XML Format 6**.
      - In the **Project** field, click **Select** and select a project from the dialog box.
      - In the **Template** field, select a template.

        Note

        If you need to create or modify a template, click the **Manage Templates** button.

      - Click **Export**.

Tip

You can see the status of the import in the **View Service Status** dialog box.

Configuring UN/CEFACT Templates

Configure UN/CEFACT templates to define data exchange options for exporting to UN/CEFACT XML Format 6.

To configure UN/CEFACT templates:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/Export Projects** dialog box, click the **Export** tab.
   c. On the **Export** tab:

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- Select **UN/CEFACT XML Format 6** from the **Export Type** list.
- Select a project.
- Click **Manage Templates**.

d. In the **Manage UN/CEFACT Templates** dialog box:

- Click a template or click + **Add** to create a new template.

e. In the **UN/CEFACT Template** dialog box:

- Configure the lists, options, and fields on each tab.
- Click **Save**.

> **Note**
>
> Once data is exported from P6 into another project management tool, dates, durations and other data may no longer reflect those in P6 if the other project management tool recalculates this data.

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Exporting Projects using IPMDAR

You can export projects to locations outside of P6 using IPMDAR Format. The IPMDAR export generates a collection of JSON files which constitute the IPMDAR data.

To export projects using IPMDAR:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/Export Project** dialog box, click the **Export** tab.
   c. On the **Export** tab:
      - In the **Export Type** field, select **IPMDAR**.
      - In the **Project** field, click **Select** and select a project from the dialog box.
      - In the **Template** field, select a template.

> **Note**
>
> If you need to create or modify a template, click the **Manage Templates** button.

      - Click **Export**.

> **Tip**
>
> You can see the status of the import in the **View Service Status** dialog box.

Configuring IPMDAR Templates

Configure IPMDAR templates to define data exchange options for exporting to IPMDAR format.

To configure IPMDAR templates:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/Export Projects** dialog box, click the **Export** tab.
   c. On the **Export** tab:

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- Select **IPMDAR** from the **Export Type** list.
- Select a project.
- Click **Manage Templates**.

d. In the **Manage IPMDAR Templates** dialog box:

- Click a template or click + **Add** to create a new template.

e. In the **IPMDAR Template** dialog box:

- Configure the lists, options, and fields on each tab.
- Click **Save**.

> **Note**
>
> Once data is exported from P6 into another project management tool, dates, durations and other data may no longer reflect those in P6 if the other project management tool recalculates this data.

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Exporting Projects using CPP

You can export projects to locations outside of P6 using CPP Format. The CPP format export generates a collection of JSON files which constitute the CPP data.

To export projects using CPP:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/Export Project** dialog box, click the **Export** tab.
   c. On the **Export** tab:
      - In the **Export Type** field, select **DOE - CPP**.
      - Click **Add Project...** to select the projects you want to export.
      - Optionally, to remove a project from the export list, click **Context** and select **Remove**.
      - Select a project and click **Add Baseline...** to select the baselines you want to export for that project.
      - In the **Template** field, select a template.

        > **Note**
        >
        > If you need to create or modify a template, click the **Manage Templates** button.

      - Click **Validate** to view the validation report.
      - Click **Export**.

> **Tip**
>
> You can see the status and download the export file in the **View Service Status** dialog box.

Configuring CPP Templates

Configure CPP templates to define data exchange options for exporting to CPP format.

To configure CPP templates:

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1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/Export Projects** dialog box, click the **Export** tab.
   c. On the **Export** tab:
      - Select **DOD - CPP** from the **Export Type** list.
      - Select a project.
      - Click **Manage Templates**.
   d. In the **Manage CPP Templates** dialog box:
      - Select a template or click **Add** to create a new template or **Import Template** to import a template.

> **Note**
>
> To export a CPP template, select **Context** and select Export.

   e. In the **CPP Template** dialog box:
      - Configure the lists, options, and fields on each tab.

> **Note**
>
> To export the full path of a code value (that is the path to a code value's place in its hierarchy), in the code value picker, mark the **Include code value path** option. When this option is selected, each hierarchical level of the path to the code value is separated with a dot. For example, ENG.Elec.Micro.Interface.

      - Click **Save**.

> **Note**
>
> Once data is exported from P6 into another project management tool, dates, durations and other data may no longer reflect those in P6 if the other project management tool recalculates this data.

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Importing Projects from a Zip File

You can import projects and baselines from compressed zip file that contains a file using the Primavera XML format. If the zip file contains multiple XML files, only the file with the same name as the zip will be imported. If the zip contains only one XML file, the name of the zip and XML file need not match.

To import projects from a zipped file:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/ExportProject** dialog box, click the **Import** tab.
   c. On the **Import** tab:
      - In the **Import Type** list, select **Primavera XML**.
      - In the **File** field, click **Browse**.
   d. In the **File Upload** dialog box, select a zipped file containing an XML file and click **Open**.
   e. On the **Import** tab:
      - Select a Template to use, configure the Import Actions for each project, and optionally select which baselines to import.
   f. Click **Import**.

> **Tip**
>
> You can see the status of the import in the **View Service Status** dialog box.

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Exporting Projects to a Zip File

You can export projects to a compressed file. The resulting zip file contains a single Primavera XML file that describes the projects you selected to export.

To export projects to a compressed file:

1. On the **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Click the **Actions** menu and select **Import/Export Projects**.
   b. In the **Import/ExportProject** dialog box, click the **Export** tab.
   c. On the **Export** tab:
      - In the **Export Type** field, select **Primavera XML**.
      - Select the **Export to ZIP** option.
      - Click **Add Project...**, and in the **Select Project** dialog box select the projects to export then click **Select**.
      - In the **Baselines** field, click and select which baselines you want to include with the export.
      - Click **Export**.

> **Tip**
>
> To download the exported file, click the link in the View Service Status tab or Notifications dialog box.

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Importing from a Spreadsheet

You can import some types of data from a spreadsheet format.

Importing Activities

You can import new activities into a P6 project from a Microsoft Excel (.xlsx) file. Create an import template, fill in the data you want to import, and save the file before before completing these steps.

To import activities:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click the **Actions** menu and select **Import** and then select **Import from Excel**.
   b. In the **Import Activities** dialog box:
      - Click **Browse** in the **Import File** field and select a file from the dialog box.
      - Click **Select** in the **Select Project** field and select a project from the dialog box.
      - Click **Import**.
   c. On the **Activities** page, click **Save**.

> **Tip**
>
> The import file must be in Microsoft Excel (.xls or .xlsx) format.

Creating Import Templates for Importing Activities

Create a Microsoft Excel template to use when importing new activities into a P6 project.

To create import templates:

1. On the **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Customize View**.
   b. In the **Customize View** dialog box:
      - Click the **Columns** tab.
      - Move the columns you want in the import template to the Selected Columns list.

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- Click **Apply**.

c. In the **Activities** page, click **Save View**.

d. Click the **Actions** menu and select **Import** and then select **Create Import Template**.

e. When prompted, choose whether to open or save the file.

Tip

- The import template is created as a Microsoft Excel file with the default file name, *ExportDataToSpreadsheet*.
- When you select columns for your activity view, include **Activity ID** or **Activity Name** to ensure that these fields are added to the import file spreadsheet. These fields are required in the spreadsheet to ensure that activities added during import are uniquely identified in your project when the import has completed.
- If a duplicate activity name exists, it will be added again as a new activity.
- In the import file, column order is irrelevant and the data fields you import are not required to match the columns in your current activity view. Data for import is identified by the internal names of the data fields in the first row of the spreadsheet.
- The import process will start at the first tab of the import file, regardless of the tab name.
- Blank rows are ignored.
- The import file contains two rows of column headings that match the columns you previously selected to display in the table or Gantt chart. The first row of headings identify the data to be imported into each column of your activity view. Do not change the content in columns of the first row. The second row contains descriptive information that is not used by the import process. You can modify the content in the second row.
- If values are not provided for mandatory fields, such as the date field, a default value will be set and corresponding data will be imported.
- Although the activity view is limited to 30 columns, you can add columns to your spreadsheet to import more than 30 fields of data.
- All activity fields except for non-editable fields are available for import. Examples of non-editable fields include: expenses, notebook topics, predecessors, resource IDs, resource names, role IDs, steps, and successors. Non-editable columns display an asterisk (*). You cannot import data for these fields. At least one editable field must be provided in a row of the import file for an activity to be imported.
- If an Enterprise Data field value does not exist for a Global Activity Code, Enterprise Project Structure (EPS) Activity Code, Project Activity Code, Calendar, Cost Account, or Primary Resource, the assignment will not be added.
- Secure activity codes are not imported, even if the column exists in the spreadsheet.
- Durations with abbreviations that match the abbreviations set on the **Time Periods** page of the **Application Settings** page are imported.

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Importing Locations

You can import new locations into P6 from a Microsoft Excel (.xlsx) file.

To import locations:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Locations**.
3. On the Locations page, click**Actions** and select **Import from Excel**.
4. In the Import Locations dialog box:
   a. In the Import File field, click **Select** and select a file.
   b. Click **Import**.
5. In the import confirmation message box, click **OK**.

Tip

- Click **Actions** and select Create Import Template to download a template file ready for you to populate with data.
- When you import a project in Primavera XML format, if you choose to import locations any locations assigned in the project will be imported.

Creating Import Templates for Importing Locations

Create a Microsoft Excel template to use when importing location data.

To create an import template:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. On the **Enterprise Data** page, expand **Global** and click **Locations**.
3. On the Locations page, click the **Actions** menu and select **Create Import Template**.
4. In the File Download dialog box, click **Open** to modify the template or click **Save** to save it.

Tip

- The import template is created as a Microsoft Excel file with the default file name, *ExportDataToSpreadsheet*.
- The top two rows of the spreadsheet are required when importing data locations from a spreadsheet. Do not change the data in these rows.

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Importing Enterprise Data

You can import enterprise data into P6 from a spreadsheet. This is useful if you need to modify or add new enterprise data using the features of a spreadsheet application.

To import enterprise data:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. Click **Import/Export Enterprise Data**.
3. In the **Import/Export Enterprise Data** dialog box, click the **Import** tab.
4. On the **Import** tab:
   a. Click in the **File** field and click **Select**, then browse to and select the file to import.
   b. Select the data types to import.
   c. Click **Import**.

Tip

- You must have the appropriate data access and permissions to import data from a spreadsheet.
- Calendars and risk thresholds cannot be imported.
- You cannot delete data from the Enterprise Data page using the import feature.
- When the import process is complete, you can download a copy of the input file from the View Service Status dialog box to view the Status and Remarks columns. The Status column shows a value for each row in the file. If the status column shows *Added* or *Updated* the data on that row was added or updated successfully. If the status column shows *Added - Failed* or *Updated - Failed*, the import for that row failed and further information is given in the Remarks column.

Creating an Import File

P6 can import Excel files in either .xls or .xlsx format. The import file must be in the correct format to be imported successfully. The following must be true for the file to be imported:

- Each data type must be contained in a separate worksheet in the file.
- The worksheets must contain the names of the data types exactly as they appear in the tabs on the Enterprise Data page. Worksheets which do not match the names of data types in the Enterprise Data page will not be imported.
- The first two rows of each worksheet in the file must contain the database column name and human readable column name of each of the data attributes to be imported.
- Duplicate rows will overwrite earlier rows when you import the file. Rows are identified by the primary keys for the data type. If two rows have the same data in the primary key fields they are duplicate rows.
- It is possible for a row to have multiple data errors, however import of a row will fail at the first data error encountered on a row. The results column explains the cause of the import

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failure so that you can correct the data and import the file again. It might be necessary to import a file several times before a row with multiple data errors can be added or updated.

> **Note**
>
> Oracle recommends that you create an import file by exporting the relevant data types first. If you intend to import data frequently, it is good practice to create an export file containing all data data types and protect the first two rows on each sheet and the worksheet names before populating the file with the data to be imported.

Enterprise Data Import Format

This topic provides information about the rules for each of the columns on each of the worksheets in the import file.

> **Note**
>
> Except in the case of mandatory columns, if no data is provided for a column or there is an error in the data supplied in a column, the default will be used wherever possible.

Baseline Types

- You must provide a value for Type. If this column is empty or populated with unrecognizable data, the row will be ignored. If this column is missing, the sheet will be ignored.
- When importing, if matching data is found in the database, the row is used to update the row in the database. Matching is not case sensitive.

Codes: Activity Codes (global, project, and EPS), Project Codes, and Resource Codes

- You must provide a value for Code Name and Code Value Name. If the row represents a code value, you must also provide a value for Parent Code Name. If these columns are empty or populated with unrecognizable data, the row will be ignored. If these columns are missing, the sheet will be ignored.
- When importing, if matching data is found in the database for Code Name or Code Value Name the row is used to update that code or value. If no matching Code or Code Value is found, the row is used to add a new code or value. The Code Value Name is case sensitive.
- The Type must contain either Code or CodeValue. If the Type is CodeValue, the Parent Code Name column must contain the Name of the code for which this row is a value.
- If the Color column is populated, the values must match the name of the color as shown in the application. To see the name of the color in the application, double click the color column on any activity code in the Enterprise Data page and hover over the color.
- Cells which contain attributes which are represented with options in the application can include either *true* or *false*, or *1* or *0*.
- The code hierarchy is represented using the Parent Code Name and Parent Code Value Name columns. If the row represents a code value at the top level of the activity code, the

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Parent Code Name column must contain the name of the parent code as it appears in column A. If the row represents a code value that is not at the top level of the activity code hierarchy, the Parent Code Value Name column must also contain the name of the code value under which the data item will be imported.

Codes: Issue Codes

- You must provide a value for Name and Type. If the row represents a code value, you must also provide a value for Parent Code Name. If these columns are empty or populated with unrecognizable data, the row will be ignored. If these columns are missing, the sheet will be ignored.
- When importing, if matching data is found in the database for Name the row is used to update that code or value. If no matching Code or Code Value is found, the row is used to add a new code or value. The Code Value Name is case sensitive.
- The Type must contain either Code or CodeValue. If the Type is CodeValue, the Parent Code Name column must contain the Name of the code for which this row is a value.
- The Secure column can contain either true or false, or 1 or 0.
- The code hierarchy is represented using the Parent Code Name column. If the row represents a code value at the top level of the issue code hierarchy, the Parent Code Name column must contain the name of the parent code as it appears in column A. If the row represents a code value that is not at the top level of the issue code hierarchy, the Parent Code Value Name column must also contain the name of the code value under which the data item will be imported.

Codes: Overhead Codes

- You must provide a value for Name and Description. If these columns are empty or populated with unrecognizable data, the row will be ignored. If these columns are missing, the sheet will be ignored.
- When importing, if matching data is found in the database for Name the row is used to update that code. If no matching code is found, the row is used to add a new code.

Cost Accounts

- You must provide a value for Id and Name. If these columns are empty or populated with unrecognizable data, the row will be ignored. If these columns are missing, the sheet will be ignored.
- When importing, if matching data is found in the database for both Id and Name the row is used to update the other columns in the database. If matching data is found in the Id and Parent Cost Account columns, but not the Name column, the row is used to update the Name column. If no matching ID or Name value is found, the row is used to add a new cost account.
- The cost account hierarchy is represented using the Root Cost Account and Parent Cost Account columns. If the row represents a cost account at the top level of the hierarchy, the Root Cost Account column must be blank. If the row represents a cost account that is not at the top level of the cost account hierarchy, the Root Cost Account row must contain the Id of the cost account under which the data item is to be imported. Optionally, if the row represents a cost account that is not at the top level of the cost account hierarchy, the Parent Cost Account column can contain the Id of the cost account under which the data item is to be imported.

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Currencies

- You must provide a value for Id, Name and Currency Symbol. If these columns are empty or populated with unrecognizable data, the row will be ignored. If these columns are missing, the sheet will be ignored.
- When importing, if matching data is found in the database for both Id and Name the row is used to update the other columns in the database.
- The currency symbol can be one, two, or three characters and must not contain digits.
- The decimal symbol and digit grouping symbol can both be either a period or comma. You cannot use the same symbol for both the decimal and digit grouping symbols.
- The exchange rate specifies the rate between the base currency in the database and the currency being imported or updated. The base currency value is multiplied by the exchange rate to calculate the values displayed in cost fields.

Document Categories

- You must provide a value for Name. If this column is empty or populated with unrecognizable data, the row will be ignored. If this column is missing, the sheet will be ignored.
- When importing, if matching data is found in the database for Name, the row is used to update that category. If no matching code is found, the row is used to add a new category. Matching is not case sensitive.

Document Status

- You must provide a value for Name. If this column is empty or populated with unrecognizable data, the row will be ignored. If this column is missing, the sheet will be ignored.
- When importing, if matching data is found in the database for Name, the row is used to update that status. If no matching code is found, the row is used to add a new status. Matching is not case sensitive.

Financial Period Calendars

- When importing from Excel, you can only create new financial periods.
- You must provide a value for Name, Start Date, and Finish Date. If these columns are empty or populated with unrecognizable data, the row will be ignored. If these columns are missing, the sheet will be ignored.
- The start date must be one day later than the finish date of the latest defined financial period in the database. Financial periods must be at least 7 days long and must not overlap.
- You cannot update or replace the assignment of a financial period calendar to a project by importing using the Update Existing option.
- Financial periods for a financial period calendar must be contiguous, meaning that there must not be a gap between financial periods.
- The Start Date and Finish Date columns must be configured to use a numeric date format in the Excel import sheet. Dates provided in text format are not recognized.

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Funding Sources

- You must provide a value for Name. If this column is empty or populated with unrecognizable data, the row will be ignored. If this column is missing, the sheet will be ignored.
- When importing, if matching data is found in the database for Name the row is used to update the other columns in the database. If no matching Name value is found, the row is used to add a new funding source.
- The funding source hierarchy is represented using the Parent Funding Source column. If the row represents a funding source that is not at the top level of the funding source hierarchy, the Parent Funding Source column must contain the Name of the funding source under which the data item is to be imported.
- You can move a funding source to a different parent on import by entering the Name of the new parent in the Parent Funding Source column.

Locations

- You must provide a value for Name, Latitude, and Longitude. If these columns are empty or populated with unrecognizable data, the row will be ignored. If these columns are missing, the sheet will be ignored.
- When importing, if matching data is found in the database for both Name the row is used to update the other columns in the database.
- The Country column must contain the name of a country as it appears in the database. To see a list of the countries that appear in the database, view the Country list in the Add Location dialog box in P6.
- The Latitude column must contain data in the range of "-90" to "90" or "90S" to "90N".
- The Longitude column must contain data in the range of "-180" to "180" or "180W" to "180E".
- The Name field can accept up to 255 alphanumeric characters or symbols. The Street and Street 2 fields can accept up to 200 alphanumeric characters. The Postal Code field can accept up to 20 alphanumeric characters.

Notebook Topics

- You must provide data for Topic Name, as well as the value "True" or "1" for at least one of the following columns: EPS, Project, WBS, or Activity.
- When importing, if matching data is found in the database for Topic Name the row is used to update the other columns in the database.
- The Topic Name field can accept up to 40 alphanumeric characters or symbols.
- The EPS, Project, WBS, and Activity fields can accept values of "True" and "False" or "1" and "0". Null values are considered to be False or 0. The EPS, Project, WBS, and Activity fields cannot be changed to false after a notebook item of the selected type has been assigned at that level.

Risk Categories

- You must provide a value for Name. If the row represents a category that is not at the root level of the hierarchy, you must also provide a value for Parent Risk Category. If the Name column is empty or populated with unrecognizable data, the row will be ignored. If the Name column is missing, the sheet will be ignored.

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- When importing, if matching data is found in the database for Name, the row is used to update that category. If no matching Name is found, the row is used to add a new category. Matching is not case sensitive.
- The hierarchy is represented using the Parent Risk Category column. If the row represents a category at the top level of the hierarchy, the Parent Risk Category column must contain the name of the parent category.

Resource Curves

- You can import and update only global resource curves. You cannot update default resource curves.
- You must provide a value for Name. If the Name column is empty or populated with unrecognizable data, the row will be ignored. If the Name column is missing, the sheet will be ignored.
- The Duration % columns can accept numeric values and the percent symbol only.
- The import and update processes do not verify that the total of all the Duration % columns equal 100%.

Step Templates

- You must provide a value for Template Name,.Step Name, and Type. If these columns are empty or populated with unrecognizable data, the row will be ignored. If these columns are missing, the sheet will be ignored.
- When importing, if matching data is found in the database for Template Name,.Step Name, Type, and Parent Step Template Name the row is used to update the other columns in the database. If no matching Template Name,.Step Name, Type, and Parent Step Template Name values are found, the row is used to add a new step template.
- You cannot import data to the Step Count column.
- Weight can be between 0 and 999,999.
- Type can be either Step Template or Step.
- The step hierarchy is represented using the Parent Step Template Name column. If the row represents a step, the Parent Step Template Name column must contain the Name of the step template under which the data item is to be imported.

Timesheet Periods

- You can only create new timesheet periods by importing from Excel.
- You must provide a value for Start Date and Finish Date. If these columns are empty or populated with unrecognizable data, the row will be ignored. If these columns are missing, the sheet will be ignored.
- Timesheet periods must not overlap, but need not be contiguous.
- The Start Date and Finish Date columns must be configured to use a numeric date format in the Excel import sheet. Dates provided in text format are not recognized.

Units of Measure

- You must provide a value for Unit Abbreviation and Unit Name. If these columns are empty or populated with unrecognizable data, the row will be ignored. If these columns are missing, the sheet will be ignored.
- When importing, if matching data is found in the database for Unit Abbreviation or Unit Name the row is used to update the other column in the database. If no matching Unit

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Abbreviation or Unit Name values are found, the row is used to add a unit of measure. Matching is not case sensitive.

User Defined Fields (Activity, Assignment, Resource, WBS, Risk, Expense, Step, Issue, Document)

- You must provide a value for User Defined Field and Data Type. If these columns are empty or populated with unrecognizable data, the row will be ignored. If these columns are missing, the sheet will be ignored.
- The User Defined Field is limited to a maximum of 40 alphanumeric characters (including special characters).
- When importing, matching is determined by the data in the User Defined Field column. If matching data is found in the database for User Defined Field the row is used to update that UDF, otherwise the row is used to add a new UDF. Matching is not case sensitive.
- If no data, or unrecognizable data, is provided in the Data Type column, the UDF is imported with the data type of Text.
- The data type for a UDF cannot be changed once data has been entered for that UDF anywhere in the application.
- The Data Type column must contain one of these values: text, start date, finish date, cost, number, integer, or indicator. The data type is not case sensitive.

WBS Categories

- You must provide a value for Category. If this column is empty or populated with unrecognizable data, the row will be ignored. If this column is missing, the sheet will be ignored.
- When importing, if matching data is found in the database for Category the row is used to update the other columns in the database. If no matching Category value is found, the row is used to add a new WBS category.

Importing and Exporting Enterprise Data

You can import enterprise data to create and update your enterprise data dictionaries more efficiently.

> **Note**
>
> Oracle recommends always working from a recently exported copy of your enterprise data.

When you export your existing enterprise data, the resulting XLSX file includes a separate tab for each page of enterprise data page. You can modify or create new data in the spradsheet by modifying or adding to rows three and later. Be careful to follow the existing format of data in the spreadsheet.

To import enterprise data:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. Click **Import/Export Enterprise Data**.
3. On the **Export** tab:

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a. Select the types of enterprise data to export.

b. Click **Export**.

Your browser might require you to approve the download of the file.

4. Open the exported file and enter or update the data on rows three and later.

> **Note**
>
> Do not change or delete any of the data in rows one and two of each tab in the XLSX file.

5. Click **Import/Export Enterprise Data**.

6. On the **Import** tab:

a. In the **File** field, click **Browse**.

b. Select the types of enterprise data to import.

c. Click **Import**.

> **Tip**
>
> You can't delete enterprise data by importing an XLSX file.

The ability to import and export Enterprise data as described here, replaces previous import and export processes that relied on the P6 Professional SDK using a macro-enabled Excel file. Primavera SDK was a 32-bit technology and has not been supported since release 18.8. Many platforms (including Microsoft Excel) restrict macro use by default, to help protect your data against unintended macro activity. Therefore importing and exporting enterprise data using the method described here offers improved security over the use of the P6 Professional SDK tool.

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Exporting to a Spreadsheet

You can export some types of data to a spreadsheet format.

Exporting Projects to Excel

You can export the list of projects in your EPS view to a Microsoft Excel (.xlsx) file.

To export projects:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **EPS**.
2. On the **EPS** page:
   a. Select an EPS view from the **Views** list.
   b. Configure the EPS view to determine what data is exported.
   c. Click **Download**.
   d. In the **Opening** dialog box, choose whether to open or save the file.

> **Tip**
>
> All data is exported as it appears in the current EPS view.

Exporting Activities to Excel

You can export activity data to a Microsoft Excel (.xlsx) file.

To export activities:

1. On the ☰ **Navigation Menu**, expand **Projects** and click **Activities**.
2. On the **Activities** page:
   a. Click **Customize View**.
   b. In the **Customize View** dialog box:
      - Click the **Columns** tab.
      - Move the columns you want in the import template to the Selected Columns list.
      - Click **Apply**.
   c. In the **Activities** page, click **Save View**.
   d. Click **Download**.
   e. When prompted, choose whether to open or save the file.

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> **Tip**
>
> All data, including grouping row information, is exported as it appears in the activity table or the activity grid.

Exporting Resource Data

Resource information, including resource unit and cost allocation data, high-level planning information, and resource and role usage information can be saved to a Microsoft Excel spreadsheet (*.xlsx).

All data is exported as it appears in the current view. Customize the rows using the customization options on the page, which are either a customize link or a customize columns button, to display only the data you want to export.

Use the following tasks to export data from the Resources section:

- Exporting Resource Administration Data
- Exporting Resource Assignment Data
- Exporting Resource or Role Usage Data

Exporting Resource Administration Data

Perform these steps to save customized resource or role information to a Microsoft Excel spreadsheet (*.xlsx) for a single resource or multiple resources. All data is exported as it appears in the current view.

To export resource or role data:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Administration** page, click either the **Resources** or **Roles** tab.
3. On the **Resources** or **Roles** tab:
   a. Click **Customize View**.
   b. In the Customize View dialog box:
      - Configure the columns to be exported.
      - Configure the sorting options.
   c. Expand resources or roles until all the resources or roles you want to view is visible.
   d. Click **Download**.

      When prompted, choose whether you want to open or save the export file.

To export resource team or role team data:

1. On the **Navigation Menu**, expand **Resources** and click **Administration**.
2. On the **Administration** page, click either the **Resource Teams** or **Role Teams** tab.
3. On the **Resource Teams** or **Role Teams** tab:

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a. Expand the **Global** group if you want to export Global team data.

b. Expand the **User** group if you want to export User team data.

4. Click **Download**.

Exporting Resource Assignment Data

Perform these steps to save customized detailed resource assignment information to a Microsoft Excel spreadsheet (*.xlsx). All data is exported as it appears in the current view.

To export resource assignment data:

1. On the **Navigation Menu**, expand **Resources** and click **Assignments**.
2. On the **Assignments** page:

   a. Click **Customize View** to customize the table. The fields that are visible on the page are the fields that are exported to the Excel spreadsheet.

   b. Click **Download**.

      When prompted, choose whether you want to open or save the export file.

Exporting Resource or Role Usage Data

Perform these steps to save customized resource or role usage data from the Resources Analysis section to a Microsoft Excel spreadsheet (*.xlsx). All spreadsheet rows and the entire visible timescale are exported.

To export resource or role usage data:

1. On the **Navigation Menu**, expand **Resources** and click **Analysis**.
2. On the **Analysis** page, click the **Resource** button or the **Role** button.
3. In the **Resource** view or the **Role** view:

   a. Click the **Group By** list and select a group type option.

      The resources available depend on your selection, along with your resource security settings. If you select an individual resource, the spreadsheet displays allocation data for that resource. If the resource is a parent resource, you can select the resource's children (if any); if the resource is a child resource, no other resources are available.

      If you select a resource code, resource team, or primary role on the Resource Usage tab, the spreadsheet displays summary allocation data for the code, team, or role; you can select an individual resource belonging to the code, team, or role. When you select a code, team, or role, you can only view allocation data for resources that you have access rights to view; resources you do not have access rights to view are not listed.

   b. Click a resource, role, code, or team name.

   c. In the spreadsheet expand the roles or resources to show all the data you want to export.

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> **Note**
>
> Only data which is visible in the spreadsheet will be exported.

d. Click **Customize View**.

4. In the **Customize View** dialog box:
   a. On the **General** tab:
      - In the **Display** list, choose whether to display units or costs.
      - In the **Timescale** list, select a timescale.
      - Configure a date range for the spreadsheet.
   b. On the **Spreadsheet** tab:
   c. Configure the **Display Fields** for the resource or role data
   d. Choose whether to show the **Allocation Limit**.
   e. Choose whether to show the **Limit**.

> **Note**
>
> A setting in your preferences determines whether the role limit includes the limits of resources assigned that role, but that are currently set as inactive.

   f. Click **Apply**.

5. In the **Resource** or **Role** view, click **Download**.

   When prompted, choose whether you want to open or save the export file.

> **Tip**
>
> - An application level setting determines whether cost spreads account for changes in resource and role rates over time.
> - For units display, if a resource code or resource team consists only of material resources with differing units of measure or a mix of labor, nonlabor, and material resources, the spreadsheet summary row displays dashes instead of totals. Summing unit values for mixed resource types does not provide an accurate total because labor and nonlabor resources are usually associated with time (such as hours or days), and material resources are often expressed in non-time units of measure.

Exporting Risk Data

Risk data can be saved to an Excel spreadsheet (*.xlsx). All data is exported as it appears in the current view. Customize the rows to display only the data you want to export.

To export risk data:

1. On the **Navigation Menu**, expand **Projects** and click **Risks**.

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2. On the **Risks** page, click **Customize View** to configure the fields, grouping, sorting and filtering to show in the exported file.
3. Click **Download**.

Exporting Enterprise Data

You can export enterprise data to a spreadsheet.

To export enterprise data:

1. On the **Navigation Menu**, expand **Administration** and click **Enterprise Data**.
2. Click **Import/Export Enterprise Data**.
3. In the **Import/Export Enterprise Data** dialog box,click the **Export** tab.
4. On the **Export** tab:
   a. Select the data types to export.
   b. Click **Export**.

Tip

- Calendars and risk thresholds cannot be exported.
- Exported files are saved in your browser's default download location.

Exporting a List of Reports

Perform these steps to save a customized list of available reports to a Microsoft Excel spreadsheet.

All data is exported as it appears in the current view.

To export a list of reports:

1. On the **Navigation Menu**, select **Reports**.
2. On the **Reports** page:
   a. Click the **Reports** or **Schedules** tab.
   b. Modify the table to view only the list of reports you want to export.
      - Expand or collapse group headings.
   c. Click **Export**.
3. When prompted, choose whether you want to open or save the export file.

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Working with Activity Views

Configure the Activities page and the Customize Activity View or Manage Views dialog box to customize the views that display the project and activity data you require in a format that meets your needs. You can save these settings with the view. Save the changes if you want them to appear the next time you work with the view. Do not save the changes if you only want your alterations to last for the session.

The view list provides quick and easy access to all activity views that are available to you. While working with activities, choosing the best view for your needs can facilitate the process of recording project data.

You can configure the content and organization of any activity view you create. For activity views you can access but did not create, you can review activity view settings, but you cannot make changes.

> **Note**
>
> On the Activities page, to quickly rearrange the columns currently displayed in a view, drag and drop them.

Your ability to perform certain actions in a view depends on the access class of the view, your role as either creator or user of the view, and your security profile. For example, if a multiple user or global view includes cost data elements and the current user does not have rights to view costs, the data is dashed out so it is not visible to the user.

You can group all activities that contain the same value for a specific data field. For example, if you choose to group by Project then by Primary Resource, the Activities page groups activities in project groupings. Then, within each project group, activities are further categorized according to primary resource. Finally, within each primary resource group, activities are sorted based upon the sort field and sort order you specify, for example Start Date. You can sort EPS, Activities, and Assignments views by up to five columns.

In the Gantt chart, when you group activities, a summary bar appears for each group. You can expand and collapse the group as needed to focus only on the project Summary Schedule or on the Detailed Schedule. In the table, when you group activities, each grouping level is identified and separated by a colored band or background. You can elect to show aggregates, for each group.

You can export and import views to share them with colleagues working in another P6 system.

Exporting Views

Export views to share them with colleagues working in another P6 system.

To export views:

1. On the **Navigation Menu**, expand **Projects** or **Resources**.

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- If you expanded **Projects**, click **Activities**, **EPS**, or **Assignments**.
- If you expanded **Resources**, click **Assignments**.

2. Click the **Views** menu and select **Import/Export Views**.
3. Click the **Export** tab.
4. On the **Export** tab:
   a. Select whether to export **Classic Views** or **Standard Views**.
   b. Select the views to export.

> **Note**
>
> Use the **Select All / Deselect All** option to select all views available to you. You cannot export both classic and standard views to the same file.

   c. Click **Export**.
5. In the download window, specify a location and name for the file.

Importing Views

Import views to see the EPS, Activities, and Assignments views used by colleagues in another system.

1. On the **Navigation Menu**, expand **Projects** or **Resources**.
   - If you expanded **Projects**, click **Activities**, **EPS**, or **Assignments** then in the Activities or EPS pages.
   - If you expanded **Resources**, click **Assignments.**
2. Click the **Views** menu and select **Import/Export Views**.
3. Click the **Import** tab.
4. On the **Import** tab:
   a. Select **Select** in the **Import File** field and select the file to import..
   b. Select the views to import from the file.
   c. Click **Import**.

> **Tip**
>
> Global and user views are always imported as user views. Multiple user views are imported as multiple user views. If you have sufficient privileges, you can make views global after you have imported them by copying or moving them to the Global section in Manage Views.

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