Import Project Gantt Tasks

Note

- The **BrightWork Team Member** security role is required to import tasks.
- There is a technical limit of 1,000 tasks for the Gantt, but in order to have a reasonably responsive Gantt there is likely to be a practical lower limit based on performance in your environment.

Caution Only import tasks into a project that has an empty Gantt task list.

Import Tasks Into a BrightWork 365 Project Gantt

This import method will result in a flat task list in a specified order with durations, but without dependencies or parent-child relationships.

Create a new empty project from a template that is not associated with any Content Template.

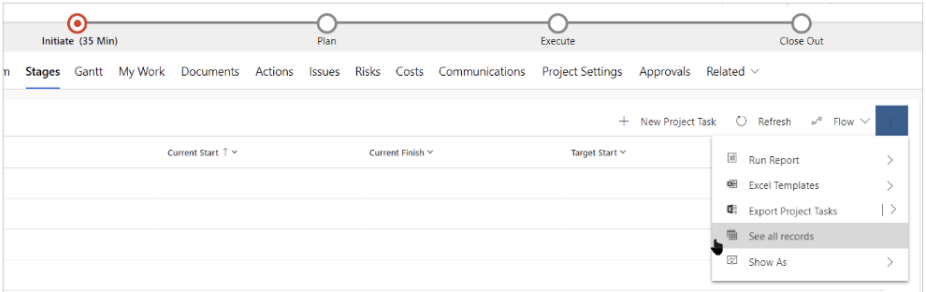
1. Open the supplied spreadsheet file that contains the required column headings and sample values in the proper format. Select the spreadsheet tab that relates to the template type of your project, e.g., Project Standard, Product Update, New Product Idea.
2. Add your tasks to the spreadsheet in the order you want them to appear in the Gantt.
3. Specify the Project Task Type: Use Stage, Task, or Deliverable.
4. Enter a Duration in Days.
5. If you want the task to be a Milestone, specify a Duration of 0 and enter Yes in the Is Milestone cell, otherwise enter No in the Is Milestone cell.
6. Enter 1000000 (1 followed by six 0s) in the first Item Order Decimal cell and 2000000 (2 followed by six 0s) in the second cell beneath it. Select both cells and drag down to the bottom to automatically increment the numbers, e.g., 1000000, 2000000, 3000000, etc.

	E	
e	Item Order Decimal	P
	1000000	J
	2000000	J
	3000000	J
	4000000	J
	5000000	J
	6000000	J
	7000000	J
	8000000	J

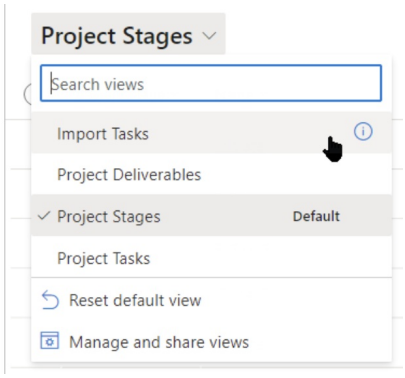
7. Enter the Project, Program and Portfolio names exactly as they appear in BrightWork 365. Each of these names must be unique in the entire environment – if they are not unique, the import will fail.
8. Select all the rows that you added.

	A	B	C	D	E	F	G	H
1	Name	Project Task Type	Duration	Is Milestone	Item Order Decimal	Project	Program	Portfolio
2	Project Summary 5101048	Task	1	No	1000000	JW Global Bank Upgrade	Customer Success	Contoso
3	Initiate	Stage	1	No	2000000	JW Global Bank Upgrade	Customer Success	Contoso
4	Initiate 1	Task	5	No	3000000	JW Global Bank Upgrade	Customer Success	Contoso
5	Initiate 2	Task	4	No	4000000	JW Global Bank Upgrade	Customer Success	Contoso
6	Initiate 3	Task	4	No	5000000	JW Global Bank Upgrade	Customer Success	Contoso
7	Plan	Stage	1	No	6000000	JW Global Bank Upgrade	Customer Success	Contoso
8	Plan 1	Task	3	No	7000000	JW Global Bank Upgrade	Customer Success	Contoso
9	Plan 2	Task	2	No	8000000	JW Global Bank Upgrade	Customer Success	Contoso
10	Plan 3	Task	2	No	9000000	JW Global Bank Upgrade	Customer Success	Contoso
11	Execute	Stage	1	No	10000000	JW Global Bank Upgrade	Customer Success	Contoso
12	Execute 1	Task	1	No	11000000	JW Global Bank Upgrade	Customer Success	Contoso
13	Execute 2	Task	1	No	12000000	JW Global Bank Upgrade	Customer Success	Contoso
14	Execute 3	Task	1	No	13000000	JW Global Bank Upgrade	Customer Success	Contoso
15	Close Out	Stage	1	No	14000000	JW Global Bank Upgrade	Customer Success	Contoso
16	Close Out 1	Task	1	No	15000000	JW Global Bank Upgrade	Customer Success	Contoso
17	Close Out 2	Task	1	No	16000000	JW Global Bank Upgrade	Customer Success	Contoso
18	Close Out 3	Task	1	No	17000000	JW Global Bank Upgrade	Customer Success	Contoso

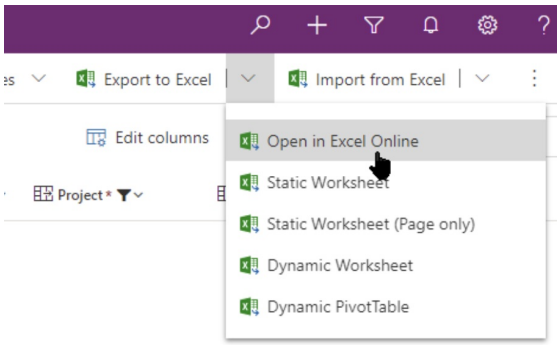
9. Right-click on the selected rows and click **Copy**.
10. Save the spreadsheet.
11. Click the **Stages** tab on a project and then click **See all records** on the three-dot menu.



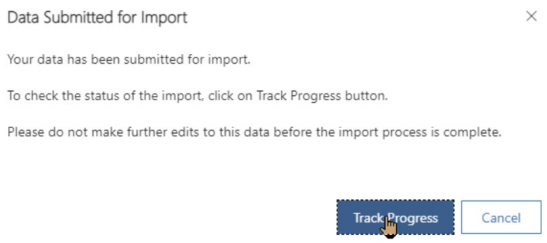
12. Select the **Import Tasks** view.



13. Bookmark the page for future use.
14. Filter the **Project** column to the name of the relevant project.
15. Click **Export to Excel > Open in Excel Online** .



16. Paste the copied spreadsheet rows into the Excel Online sheet and click **Save**.
17. Click **Track Progress**.



18. On the tracking page click **Refresh** until the import has completed. Check for any errors.
19. Navigate to your project and click the **Gantt** tab to view the imported tasks.
20. Next you will need to manually indent tasks under their parent tasks, create dependencies, and add resources. When done, you can create a Content Template from the project, which a Project Template can then use going forward.

> **Note** If you encounter failures during the above process, confirm you have appropriate permission to save the Excel Online sheet. You can do this by making an initial simple change in Excel Online, e.g., by slightly changing the name of a task and then saving the Excel Online sheet successfully.