EXPORT GUIDE

2.48.1 beta

Get your plan into any tool

Open a project, go to Import & export, Export plan, and pick the card for your tool. Every export keeps the Theme, Objective, Task outline. This guide has the import steps for each one, including routes for people without Microsoft Project.

Which export? Microsoft Project: the XML. Smartsheet: the Microsoft Project XML with no date constraints (no Microsoft Project needed). ServiceNow SPM: a .mpp saved from Microsoft Project, or without it the ServiceNow Excel through an import set. Jira and Azure DevOps: their CSV. Another Command Center: Field Guide (full fidelity).

1 Microsoft Project (XML)

The richest export: outline, dependencies with type and lag, baselines, resources and assignments, status in Text1 and sourcing in Text2. Microsoft Project opens it, and Smartsheet imports it directly.

Open it in Microsoft Project

NEEDS MICROSOFT PROJECT (DESKTOP)

1. Choose the date constraint setting, then download the XML.
2. In Microsoft Project choose File > Open, set the file type to XML Format, and pick the file. Open it as a new project.
3. Check the outline (themes > objectives > tasks), the links and the dates.
4. To get a .mpp file (for ServiceNow or anyone who needs one), choose File > Save As > Project (.mpp).

Date constraints: "Pin every start date" keeps every task on its planned date. "Pin only tasks with no predecessors" lets the links move linked tasks when something slips. "No date constraints" lets Microsoft Project start unlinked tasks at the project start; use it for Smartsheet.

2 Microsoft Project (CSV or Excel)

A flat table for the Microsoft Project import wizard: ID, Name, Outline Level, WBS, Start, Finish, Duration, Predecessors (by ID), Resource Names, % Complete, Text1 status, Text2 sourcing.

Import with the wizard

NEEDS MICROSOFT PROJECT (DESKTOP)

1. In Microsoft Project choose File > Open and pick the CSV or Excel file. The Import Wizard starts.
2. Choose New map, import As a new project, and select Tasks.
3. Map each column to the Project field of the same name. Mapping Outline Level builds the hierarchy; Predecessors use the ID column.
4. Finish, then check the outline and links. If the wizard is not available to you, use the XML export instead.

3 Smartsheet

No Microsoft Project needed. The best route is the Microsoft Project XML: Smartsheet imports it directly, with hierarchy and predecessors. The CSV or Excel here is a flat list: Task Name, Start Date, End Date, Duration, Predecessors (by row number), Assigned To (email), % Complete, Status and an RYG column.

Best: import the Microsoft Project XML

NEEDS SMARTSHEET ONLY

1. In the Microsoft Project (XML) card choose "No date constraints", then download the XML.
2. In Smartsheet select + Create > Import > Microsoft Project (or, in a workspace, + Add to workspace > Import > Microsoft Project).
3. Choose the .xml file, name the sheet and keep the task name as the Primary column. Select Import.
4. Check that rows are indented under their themes and objectives, that Predecessors filled in, and that dependencies are on in Project settings.

Or: a flat list from CSV or Excel

NEEDS SMARTSHEET ONLY

1. Download the Smartsheet CSV or Excel (Smartsheet imports only the first worksheet).
2. In Smartsheet select + Create > Import > Microsoft Excel (or CSV). Use Task Name as the Primary column.
3. Rows arrive flat. Indent them by the Level column: level 2 under its theme, level 3 under its objective, and so on.
4. In Project settings turn on dependencies with Start Date, End Date, Duration and Predecessors. Predecessors use row numbers, so indent before you sort or move rows.

Smartsheet warns that Microsoft Project features it does not support, such as date constraints, can put rows out of order. That is why the XML route uses "No date constraints".

Smartsheet limits: 50 MB per file and 20,000 rows per sheet on most plans.

4 ServiceNow SPM

Two routes. With Microsoft Project, save the XML as a .mpp and use the project import. Without it, load this Excel (or CSV) through an import set into planned tasks; an admin sets up the field map once. Columns: Project, WBS, Short description, Parent WBS, Level, Planned start and end date, Planned duration, Assigned to, State, Percent complete, Milestone, Predecessors (WBS), Planned effort, Description.

If you have Microsoft Project: import a .mpp

NEEDS MICROSOFT PROJECT, AND THE PROJECT MANAGER ROLE IN SERVICENOW

1. Download the Microsoft Project XML, open it in Microsoft Project and choose File > Save As > Project (.mpp).
2. In ServiceNow go to All > Project > Projects > Import and choose the .mpp file.
3. Choose Create new project (or update an existing active project) and name it.
4. Scheduling: Automatic lets the links calculate dates; Manual imports every task with a Start No Earlier Than date. Select Import, then check the outline, dates and links.

If you do not: load the Excel through an import set

NEEDS THE IMPORT_TRANSFORMER, IMPORT_ADMIN OR ADMIN ROLE (ASK YOUR SERVICENOW ADMIN)

1. Download the ServiceNow Excel. Its worksheet is named Project Tasks and the header is row 1.
2. In ServiceNow go to All > System Import Sets > Load Data. Choose Existing table and select Import Planned Task [imp_planned_task].
3. Choose File, pick the Excel, set the worksheet (Project Tasks) and header row (1), and Submit.
4. Map the columns (field map below) and run the transform. The admin builds the map once; every later export reuses it.

Field map for the import set. The export's column names match ServiceNow's field labels. Your admin maps them once on the Import Planned Task transform.

Column in the export	What it becomes in the import set
Project	The project the tasks belong to (find it by name, or create it first)
WBS	The task's outline number; use it to match tasks on later imports
Short description	Task name
Parent WBS	Parent task: look up the task with this WBS in the same project (blank means top level)
Level	Outline depth, for checking the result
Planned start date, Planned end date	Planned start and end (yyyy-mm-dd hh:mm:ss)
Planned duration	Duration in days
Assigned to	User, matched by email
State	Pending, Work in Progress or Closed Complete
Percent complete	Percent complete
Milestone	Milestone (true or false)
Predecessors (WBS)	Task links: load them after the tasks exist (a second transform, or by hand); the .mpp route brings them automatically
Planned effort	Planned effort in hours
Description	Description

Parent tasks and predecessors need lookups in the transform, which is why an admin sets it up once. The tasks themselves load without them.

Menus and roles can differ by ServiceNow release; check with your admin.

5 Jira (CSV import)

Issue ID and Parent ID keep the hierarchy: themes become Epics, objectives become Stories (or Bugs and Tasks) with story points, sprint, assignee and status, and tasks become their Sub-tasks.

Use the Jira CSV importer

NEEDS JIRA, WITH PERMISSION TO IMPORT (OFTEN AN ADMIN)

1. Download the Jira CSV.
2. Open Jira's CSV importer (admins: System > External system import > CSV) and pick the file and the target project.
3. Map Issue ID and Parent ID so stories link to their epics and sub-tasks to their stories; map Summary, Issue Type, Status, Assignee (email), Story Points, Sprint, Due date, Labels and Description.
4. Run the import and check that each story sits under its epic, with its sub-tasks under it.

6 Azure DevOps Boards

Title 1 / 2 / 3 columns build the tree: Epic (theme), User Story (objective, with its points and sprint), Task (task). Iteration Path uses the project name and sprint.

Import work items

NEEDS AZURE DEVOPS, WITH PERMISSION TO CREATE WORK ITEMS

1. Download the Azure DevOps CSV. The ID column is blank so new items are created.
2. In Azure DevOps go to Boards > Queries > Import work items and choose the file.
3. Review the preview: Title 1, 2 and 3 create the parent and child links. Fix any Iteration Path that does not exist yet.
4. Save the items, then check the hierarchy on the Backlogs page.

7 Field Guide (full fidelity)

Every field, including sourcing, provider output, acceptance criteria, billing triggers, and the agile side: item type, story points, sprint, board column and blocked. Round-trips back into this tool.

Bring it into another Command Center

NEEDS THIS APP

1. Download the CSV or Excel.
2. In the other workbook open Import & export and choose Import plan, or Import updates to review the changes against a plan that is already there.

Menus change. These steps follow each vendor's published import procedure at the time of this release. If a menu has moved, search the tool's help for "import Microsoft Project", "import Excel" or "import CSV".