Projects import template Rules

Rules. (*Required fields are marked with a Red background colour***)**

Field Name	Description	Rules	Exception Handling	Values to be placed	Default Values	Field Type
Project Number	This field contains the unique Number/Code of a Project	Must be unique for non-deleted projects (can use the same ProjectNumber as a deleted idea). 1-20 characters.	If the records data exceeds 20 characters, the record will NOT be imported.		If the fields value is either blank or "NEW" then the number will be generated from the relevant department or subdepartments sequence which can be setup in the admin module.	Variable Character (20)
Title	This field contains the title of the project	Titles cannot be duplicated. Titles can contain alphanumeric characters.	Project form titles cannot be duplicated. Project titles must be unique in order for the idea to be imported.	N/A	N/A	Variable Character (200)
Owner	This field contains the owner of the project.	The users need to be created on the system in order to be identified as owners of an project	This field can be blank, the record will be imported.	User	First user on the list of the system	Lookup (Users)
Performance Area	This field contains the performance area of the project	The performance area selected must match up with the performance areas saved on the system.	This field can be blank, the record will be imported.	This will be determined by the users and the Perfromance Areas they create	N/A	

Department	This is an indication of the department the project will belong to.	The department selected must match up with the departments saved on the system.	If there is a spelling mistake, or the department selected on the import does not meet the departments saved on the system, the record will still be allowed to be imported onto the system. However the department field will be empty.	This will be determined by the users and the codes they associate to the Department. All codes will be unique.	The system will default to the first entry within the lookup.	Lookup (Departments)
SubDepartment	This is an indication of the sub department the idea will belong to.	The sub department selected must match up with the sub departments saved on the system.	If there is a spelling mistake, or the sub department selected on the import does not meet the sub departments saved on the system, the record will still be allowed to be imported onto the system. However the sub department field will be empty.	This will be determined by the users and the codes they associate to the Sub Department. All codes will be unique.		Lookup (Sub Departments)
Description	This field contains the description of the project	Can contain alphanumeric characters	The description for the project does not have to be captured for import to occur	N/A	N/A	Variable Character (1000)
Budget Period	This field contains the budget period during which the project applies	The budget period selected must match up with the budget periods saved on the system	If there is a spelling mistake, or the department selected on the import does not meet the departments saved on the system, the record will still be allowed to be imported onto the system. However the budget period field will be empty.	This will be determined by the users and the Budget Periods they create	N/A	Lookup (Budget Periods
Situation	This field describes the situation preceding the implementation of an idea.	Can contain alphanumeric characters	The situation for the project does not have to be captured for import to occur.	N/A	N/A	Variable Character (1000)

Opportunity	This field describes the complication/opportunity preceding the implementation of an idea.	Can contain alphanumeric characters	The complication/opportunity for the project does not have to be captured for import to occur.	N/A	N/A	Variable Character (1000)
Solution	This field describes the solution preceding the implementation of an idea.	Can contain alphanumeric characters	The solution for the project does not have to be captured for import to occur.	N/A	N/A	Variable Character (1000)
Benefit Start Date	Date that benefit calculation starts from	Calendar date, which states when the benefit will be calculated from	N/A	Any date	N/A	Date time (YYYY-MM-DD)
Benefit End Date	Date that benefit calculation ends	Calendar date, which states when the benefit will be calculated to	N/A	Any date	N/A	Date time (YYYY-MM-DD)
Total Cost	The total cost of the project	The field does not have to be captured for import to occur. The field can only be a numeric value.	N/A	N/A	N/A	Numeric (whole numbers)
Business Critical	Indicates whether or not the project is business critical	False or True	False or True	False or True	FALSE	Checkbox (Y/N)
Likelihood	Indicates the likelihood of an impact category as a percentage	The field can only be a numeric value between 0 and 100	N/A	N/A	0	Numeric (whole numbers)
Year1Benefit	The benefit value for the first year	The field does not have to be captured for import to occur. The field can only be a	N/A	N/A	N/A	Numeric (whole numbers)

		numeric value.				
Year2Benefit	The benefit value for the second year	The field does not have to be captured for import to occur. The field can only be a numeric value.	N/A	N/A	N/A	Numeric (whole numbers)
Year3Benefit	The benefit value for the third year	The field does not have to be captured for import to occur. The field can only be a numeric value.	N/A	N/A	N/A	Numeric (whole numbers)
Year4Benefit	The benefit value for the fourth year	The field does not have to be captured for import to occur. The field can only be a numeric value.	N/A	N/A	N/A	Numeric (whole numbers)
Year5Benefit	The benefit value for the fifth year	The field does not have to be captured for import to occur. The field can only be a numeric value.	N/A	N/A	N/A	Numeric (whole numbers)
Year5BenefitsPerpetual	Indicates whether to add a perpetuity benefit on the NPV calculation	False or True	False or True	False or True	N/A	Checkbox (Y/N)
PerpetualBenefitsLinkedToInflation	Indicates whether to subtract inflation from the cost of capital in the perpetuity benefit calculation	False or True	False or True	False or True	N/A	Checkbox (Y/N)
ReadyForNextYearSpend	Indicates whether the project is ready	Available options will	This field can be blank, the record will be imported.	N/A	N/A	Variable Character

	for next yeat spend	include "Yes" or "No"				
RequireAShut	Indicates the shut the project requires	Available options will include "Major", "Minor" or "No"	This field can be blank, the record will be imported.	N/A	N/A	Variable Character
IsScopeWellDefined	Indicates how well defined the project scope is	Available options will include "Yes", "Initial" or "No"	This field can be blank, the record will be imported.	N/A	N/A	Variable Character
HowCertainIsTheCost	Indicates certainty of the cost as a percentage	Avalable options will include "+10%", "+20%", "+30%", or "+50%"	This field can be blank, the record will be imported.	N/A	N/A	Variable Character
AreResourcesAllocated	Indicates to what extent resources are allcoated	Available options will include "Yes", "Some" or "No"	This field can be blank, the record will be imported.	N/A	N/A	Variable Character
ProjectDefinition	This field contains the Project Definition of the project.	The Project Definiton needs to be created on the system in order to be identified as an Project Definition.	This field can be blank, the record will be imported.	N/A	N/A	Lookup (Project Defintions)
AccessLevel	The Access level (Project level Permissions) that will be granted to the project	If no value is provided a default value will be used.	If left blank, it will use a default value (See Default Values column)	Default \ Confiden tial \ Global	Default	Lookup (AccessLev els)
Status	This field contains the Status of the project	If no value is provided a default value will be used.	If left blank, it will use a default value (See Default Values column)	Active \ On Hold	Active	Lookup (ProjectStat uses)
TargetDate	Target date for a stage to begin.	Calendar date, which	N/A	Any date.	N/A	Date time (YYYY-MM-DD)

		states when a stage will begin.				
RevisedDate	Revised target date for a stage to begin.	Calendar date, which states when a stage will begin.	N/A	Any date.		Date time (YYYY-MM-DD)
ActualDate	Actual date a stage to began.	Calendar date, which states when a stage will begin.	This value will never be used, it will always be replaced by the revised date if one exists or the target date if one exists or it will be left blank	Any date.	N/A	Date time (YYYY-MM-DD)