Scheduling Document Creation

What is a Schedule in ePM?

Schedules

The ePM Schedule application is an integral part of the Portfolio Management suite of applications. Start and end dates for each summary event, milestone, and task can be established. Also, the ePM Administrator can set up email alerts and ePM notifications for when a task exceeds the approved milestone. Project schedules can be viewed at the project level, or rolled up into a Program-level Critical Path Method (CPM) or Collaborative Gantt view, complete with collapsible/expandable visibility into the schedules, resources, linked WBS structure, attached documents, tasks, milestones, cost summaries, progress percentage complete, and more summary detailed information. ePM Schedule can import file from Primavera, Microsoft and other applications. Like other ePM documents, the Schedule document has workflows, activity logs and attachments available. Schedules can also be cross linked to other ePM documents, such as RFI's, Submittals, Drawings, etc., to provide easy cross reference.

Calendars

The ePM calendar document allows the user to define normal working hours for a project schedule. On the calendar, exceptions can be set for particular non working days. Customized calendars for each project can be created, though each schedule document is limited to a single calendar.

Resources

The Resource document enables the creation of resources and the ability to link these resources to tasks in the Gantt chart. A user can also associate a contact with a resource in the Resource document. When a contact is not associated with a resource, the resource is a generic resource. Generic resources are useful for denoting material resources.

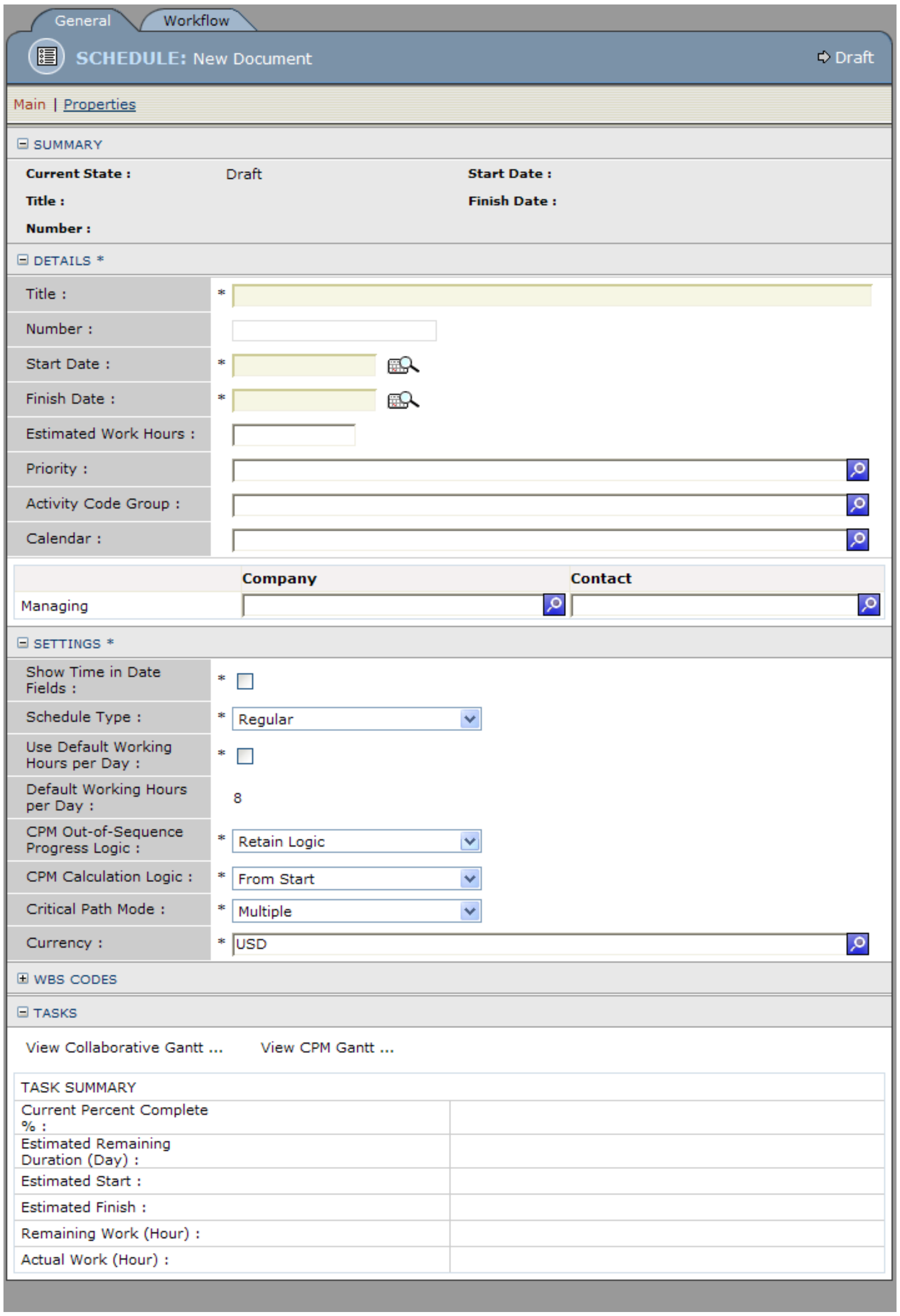
Who Will Use This?

- ✓ General Contractor
- ✓ Construction Manager
- ✓ Project Manager

Creating and Using a Schedule Document

1. Log into ePM as a user with security permissions that include the Schedule-Creator or Schedule-Approver role.
2. Navigate to your project, then to Applications > Scheduling > Schedules. The Schedule document register displays.

3. Click the ‘New’ button. A blank schedule document opens.



Enter a Title for the schedule. In the ‘Start Date’ and ‘End Date’ fields, enter the overall start and end dates for the schedule.

The ‘Activity Code Group’ allows assignment of meta data to each task or milestone in the schedule. This additional data can be useful in reports related to the schedule.

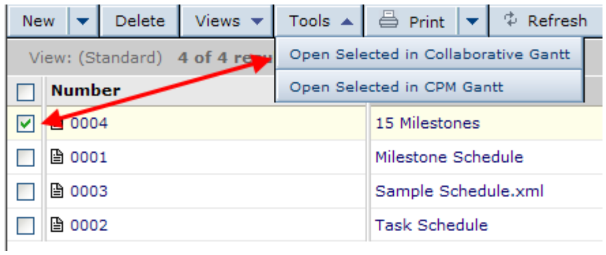
In the ‘Calendar’ field, you can select a single calendar that designates working days for all tasks in the schedule. You also can assign separate calendars to each task in the schedule.

Note- the Schedule document shown at left contains basic information about the schedule. Open the Gantt views to enter tasks, change durations, assign resources, set baselines, etc.

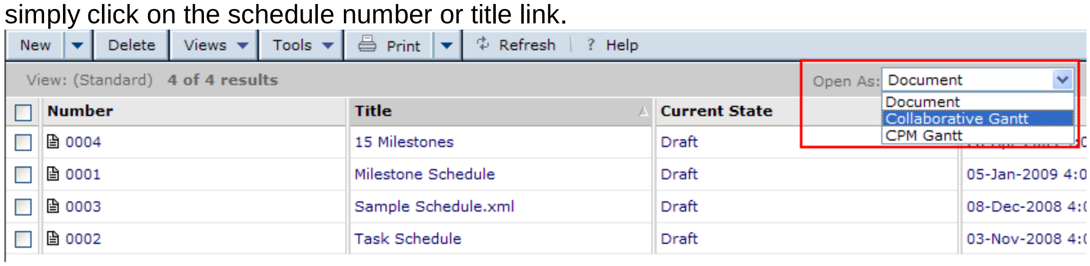
Finally, click the ‘Save’ button to save the schedule.

4. There are three ways to open the schedule in Gantt view:

   a. From the register, check the box next to the schedule (or schedules) you wish to view, then click 'Tools' and select to either open in Collaborative or CPM Gantt view.



   b. In the register, in the 'Open As' drop down list, select Collaborative or CPM Gantt, then simply click on the schedule number or title link.

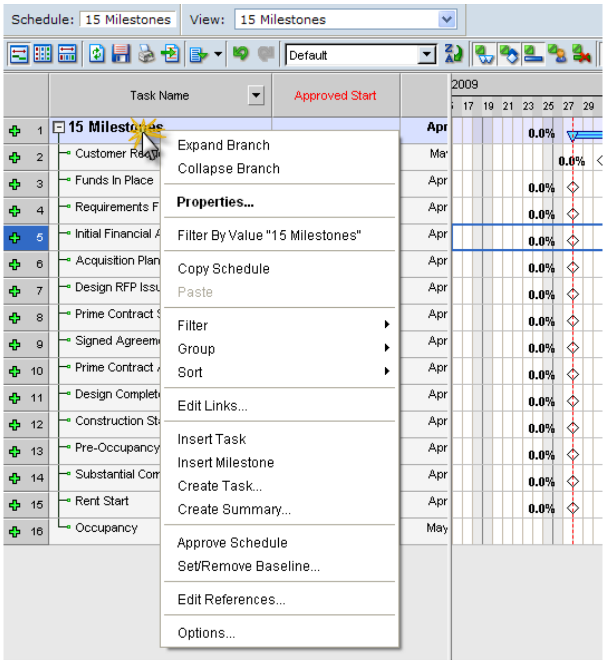


   c. Open the schedule document by clicking on its number in the register. Then in the 'Tasks' section of the 'Main' page, click on either the 'View Collaborative Gantt' or 'View CPM Gantt' buttons.

Note: Each Gantt view (Collaborative and CPM) enables you to work with tasks, milestones, assignments, WBS Codes, etc. Although the two Gantts are very similar, you can use the Collaborative Gantt to set baselines and approve schedules, and the CPM Gantt to automatically recalculate schedules according to task dependencies.

Also, in Collaborative Gantt, all of your changes are saved immediately. In CPM Gantt, you must click the Save button to save your changes. This feature in CPM Gantt enables you to play with the schedule without updating the database.

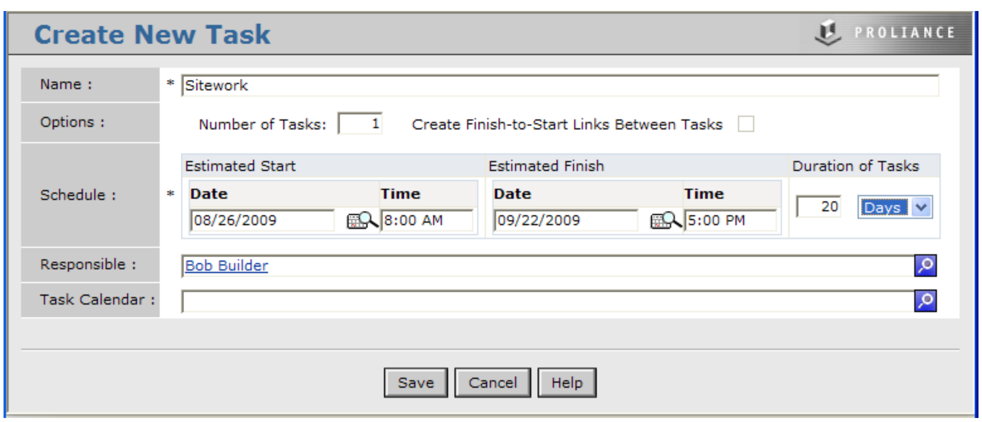
5. To add tasks, summaries and milestones to your schedule, right click on the top level schedule name, or on any existing task, summary or milestone. From the resulting list, choose 'Insert Task', 'Insert Milestone', 'Create Task' or 'Create Summary'.



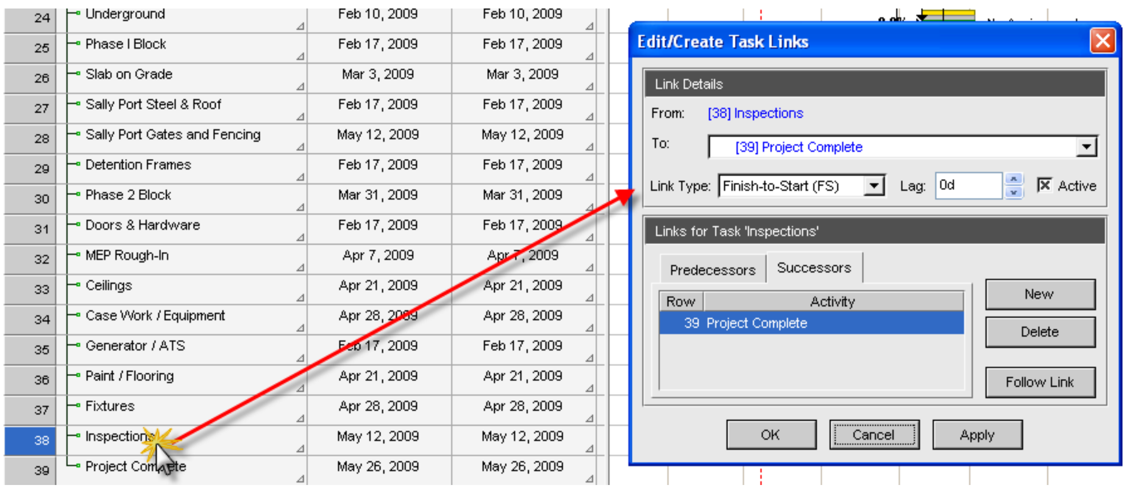
Note:

- Insert Task adds a task with a default name and duration.
- Create Task allows you to specify details about the task, and also allows creation of multiple tasks at one time

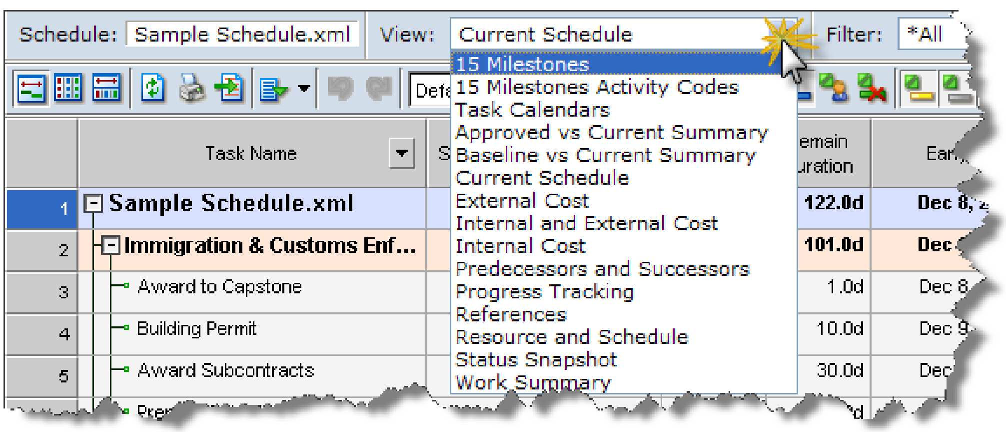
6. Selecting 'Create Task' opens a separate Create New Task dialog box, where you can enter information about the task. You can also choose to create multiple tasks in this dialog, as well as creating links between the newly created tasks.



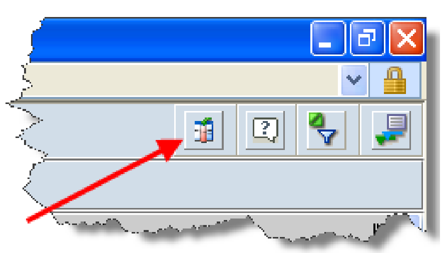
7. Once tasks are created, links can be edited or created by right-clicking a task and selecting ‘Edit Links’.



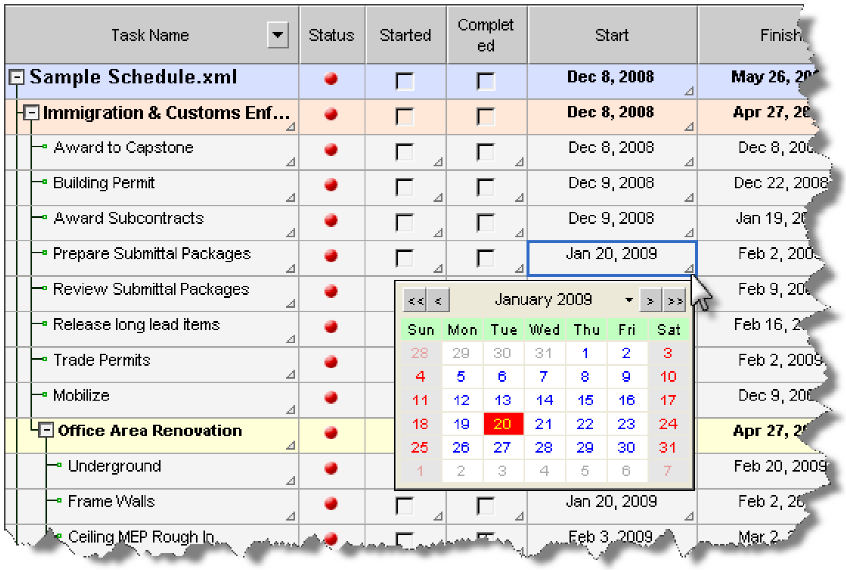
8. To change the Gantt view (which columns appear to the left of the Gantt bars, how those columns are sorted, etc), simply click on the ‘View’ dropdown list and select a view.



If you security permissions allow it, you can create your own views by clicking on the ‘Gantt Views’ button

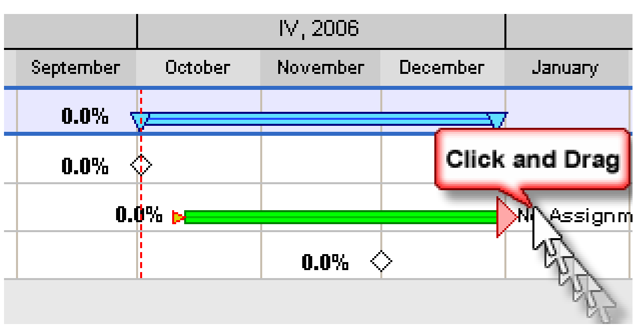


9. To change a task's start date, end date or duration, either select a new date by clicking the triangle in the lower right corner of a date field…

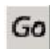
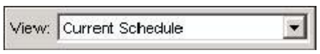
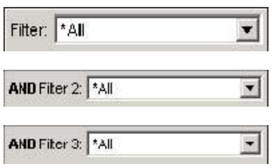
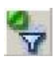


…or, in the Gantt chart, hover over the task bar in the Gantt chart, and when the bar changes color, click and drag the bar left or right to change a task's start and end date.

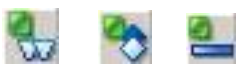
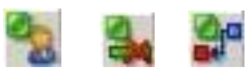
To change a task's duration, hover the mouse over the right edge of the task bar, and when a large red arrow head appears, click and drag it to the left or right.



Toolbar Icons & Their Functions

Icon	Meaning	Use/Description
	Go	Pre filter planning objects before they are displayed in the Gantt. Only available when "Use Prefiltering" is selected in the Gantt Preferences.
	Edit Gantt Preferences	Displays the Gantt Preferences dialog box
	View	Allows you to control the columns displayed in the Gantt
	Filters	Allows you to narrow down the information displayed in the columns. Filters 2 & 3 appear once you click the "Show Advanced Filters" button
	Show Advanced Filters	Displays filters 2 and 3, as mentioned above.
	Manage Views	Enables you to customize the views available in the Gantt.
	Show Gantt Chart View	Displays chart and table
	Show Spreadsheet View	Displays the Gantt table and a Usage table for each planning object as per period values.
	Show Combined View	Displays the Gantt chart, table and usage curves.
	Export	Allows you to export table information directly into Excel (requires Export Plug-in installation).
	Row Specific Commands	Displays commands for the currently selected planning object. Also enables you to perform actions such as Insert Task, Create Task, and Create Summary.
 	Undo and Redo	Allows you to clear the last change you made or reapply the change you cleared.

Toolbar Icons & Their Functions – Cont'd

Icon	Meaning	Use/Description
	Sort Order	Allows you to apply the sort order to the planning objects (for example "Sort by Task Name").
	Descending Sort Order	Allows sorting the planning objects in alphabetically descending order.
 **Summaries, Milestones, Tasks,**  **Resources, Deleted, Links**  **Approved, Baseline, Current Schedule Schedule Schedule**	Show/Hide	Allows you to include or eliminate certain types of planning objects in Gantt and Combined views.
	Rollup to Summary	Used to display the child planning object summaries in the parent summary in Gantt and Combined Views.
	Change Timescale	Used to display the desired time line in Usage chart. Choose D for days, W for weeks, M for month, Q for quarters, or Y for years.
	Show Levels	Quickly expand or collapse planning object levels to the desired level. The "?" enables you to choose a level from 0 to 9. The "*" expands all levels.

Toolbar Icons & Their Functions – Cont'd

Icon	Meaning	Use/Description
	Go to Selected Task	Used to scroll timescale to display the currently selected planning object. This button is helpful if you've selected a task, then scrolled the Gantt up or down.
	Zoom Selected Task	Used to adjust the timescale to the best fit for the selected planning object in Gantt chart.
	Reschedule to Status Date	Used to reschedule all incomplete tasks and their assignments for all dates prior to Status Date. When you click this button, the calendar appears. Choose the new resume date for tasks. Note: rescheduling the incomplete tasks allows you to accurately reflect their impact to the overall schedule.
	Chain Tasks	Creates Finish-to-Start links between the selected tasks, in the order that they appear.
	Unchain Tasks	Deletes the links between selected tasks.
	Split Assignment	Splits the time that the task assignment is scheduled for. This enables you to indicate that a task should start at a certain date that work may stop on it for a period of time and that work shall resume at a later date.
	CPM Calculation	Turns the CPM calculation on or off. Available in CPM Gantt only.

Gantt Table & Chart Icons

	A planning object is waiting to be approved.
	A planning object was modified after it was approved and needs to be re-approved.
	Information in a cell can be edited. Click this triangle to make the cell editable.
	The planning object contains references to ePM documents.
	A summary. The dark blue in the icon indicates that work has started in the summary.
	A summary with the milestones and tasks rolled up.
	A milestone. The milestone may also be approved or baselined. In this case, a second orange or blue diamond appears behind this diamond.
	A task has a current, baselined, or approved schedule. The current schedule is displayed in green, the approved in blue, and the baselined in orange.
	A planning object is linked to another planning object.
	The lines between one part of the task and the next part indicate that the assignment has been split.