Kahua Quick Reference Guide
Scheduling

About Scheduling

The Scheduling application is used to manage and view project schedules. Schedule Tasks are added by uploading MS Project or Primavera P6 scheduling reports. Edits are made by uploading revisions from the scheduling software. A Gantt chart view is available within the application.

NOTE: To baseline the schedule**, Baseline Dates** should be managed in the scheduling software and included in the report that is uploaded to Kahua.

Creating a Schedule

Navigating to Scheduling

1. Open the project using Project Finder on the left side bar.
2. Select **Scheduling** from the Other column in the App launcher.

Adding a PM Schedule

1. Select the MS Project TEMPALTE schedules from your project that most closely corresponds to your delivery method. If the schedule templates are not in your Schedule app, you can find the templates at the this Google Drive link.

All Schedules

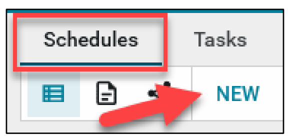
Name	Revision	Start Date	End Date	Schedule File Type	References
MS Project TEMPLATE - 032822 Traditional Construction Schedule Template-Appropriated Funds	1				
MS Project TEMPLATE - 032222 Traditional New Construction Schedule Template	1				
MS Project TEMPLATE - 020222 DB_B Site Acquisition New Construction Template	1				
MS Project TEMPLATE - 020222 DB Site Acquisition_New Construction Template	1				

2. Download the Schedule File to your computer.

3. You can now remove any unused templates from your project.
4. Open the schedule file on your computer and make updates using MS Project and save them locally to your computer, so they can be uploaded in Kahua in a following step.

   NOTE: Take care when/if you delete tasks from the template schedule to ensure that doing so will not break any schedule logic for preceding or succeeding tasks. The file includes all the standard schedule tasks and appropriate coding to connect your schedule updates to the milestones app in Kahua. You can add other tasks for any project specific tasks that you need to track.

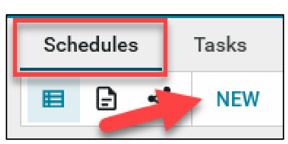
5. With the Schedules sub-app selected in the top ribbon, click **NEW** to open a new record.



6. Enter the **Name** of the schedule.
7. Click on **Select File**.
8. Click on the **Filename** field in the Upload File window.
9. Select the schedule you saved in Step 4 above.
10. Click **Upload** in the Upload File window.
11. Click **OK** on the Add Files window.
12. Enter a **Description** of the schedule.
13. **Save/Close** to save the file to the record.
14. Click on **Submit to Process** the file to show Scheduling Tasks and update the Milestones.

Adding a New Vendor/External Schedule

1. With the Schedules sub-app selected in the top ribbon, click **NEW** to open a new record.

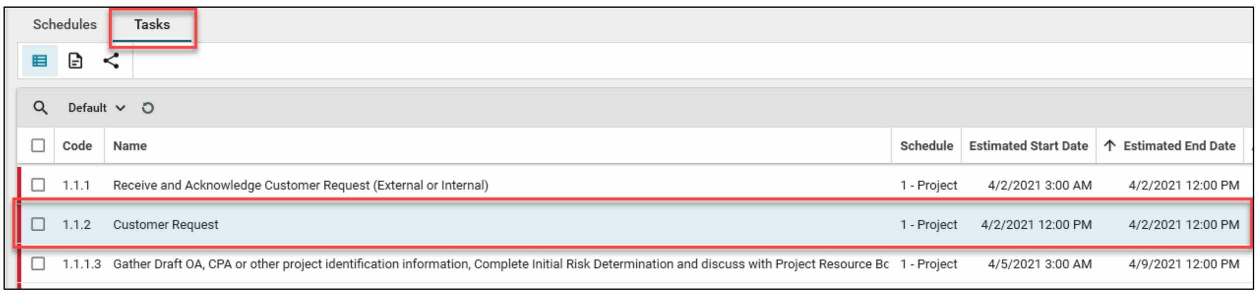


2. Enter the **Name** of the schedule.
3. When uploading a vendor's schedule, check the **External Schedule** box.
4. Enter **Vendor's** name and Contact.

5. Click on **Select File**.
6. Click on the **Filename** field in the Upload File window.
7. Select the schedule software (MS Project or P6) file.
8. Click **Upload** in the Upload File window.
9. Click **OK** on the Add Files window.
10. Enter a **Description** of the schedule.
11. **Save/Close** to save the file to the record.
12. Click on **Submit to Process** the file to show Scheduling Tasks and update the Milestones.

Manage Tasks Items

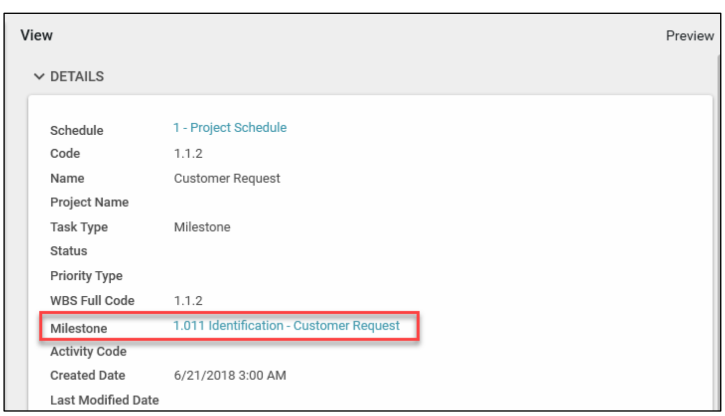
1. Click on the **Tasks** sub-app in the top ribbon.
2. Select the Tasks item to edit.



3. Click **Edit** from the top of the View pane.
4. Make changes to any editable field(s). Most fields will need to be edited in the scheduling software and then uploaded to Kahau through the revision process.
5. Click **Save/Close** at the bottom.

Navigate to the Corresponding Milestone

1. With the **Tasks** sub-app open, select the Scheduling Task item.
2. Click on the **Milestone** name. The text will be blue to indicate that it is a link to the Milestone.



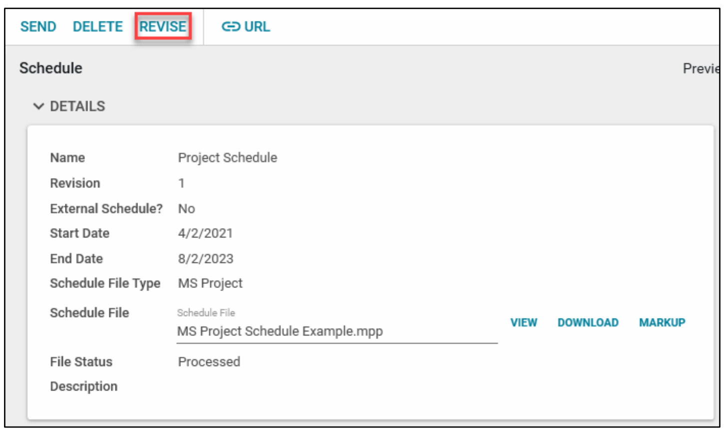
3. The **Details** of the corresponding Milestone will be open in the Milestones app.

NOTE: If **Baseline Dates** were included in the Schedule, the Project Details can be edited to allow them to appear in the applicable Milestones.

1. Open the Project Details by clicking on the pencil icon beside the project name in the top blue bar.
2. Click Edit to open the edit mode.
3. In the Project Settings section, check the Allow Milestone Baselining box.
4. Save/Close the Project Details.

Revise a Schedule

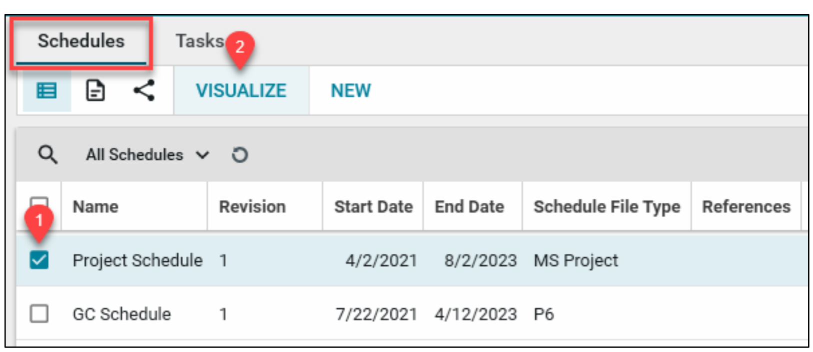
1. Return to the **Schedules** tab of the Scheduling app.
2. Select the schedule to be revised.
3. Click **Revise** in the Details pane.



4. Enter a **Revision** number.
5. Click on **Select File**.
6. **Save** the file to the record.
7. **Submit** to process the file into the project.

Visualize

1. Check the box on the left side of one or more schedules in the list view.
2. Click on **Visualize** at the top.



3. A Gantt Chart for viewing the current Schedule(s) will appear.

List Views

1. There are two logs available in the **Schedules** sub-app:
    a. **All Schedules** shows all schedules that have been added.
    b. **External Schedules** shows only schedules marked External Schedules.
2. There are two logs available in the **Tasks** sub-app:
    a. **Default** is sorted by the Estimated End Date and includes Indicators for Overdue, Due Soon, and Upcoming Estimated End Dates.
    b. **By Schedule** is the Default view grouped by each Schedule.
3. **Managed Views** allows you to set your own Columns, Sort order, Scope, Indicators, Filters, and Groups.