

Overview

This Job Aid defines the steps to follow to develop the project schedule using the built-in scheduler.

There are four (4) core actions required to develop the project schedule:

1. Identify the work.
2. Establish dependencies.
3. Assign resources.
4. Estimate the work.

Identify the work using the Timeline view



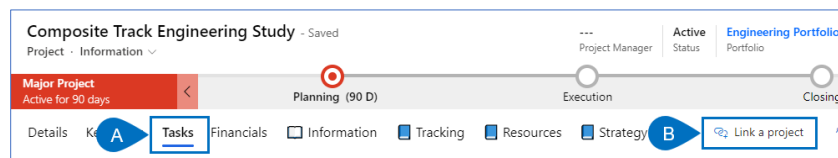
Project Manager



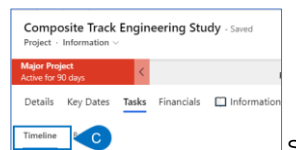
Built-in Scheduler

1. CAPTURE PROJECT DELIVERABLES

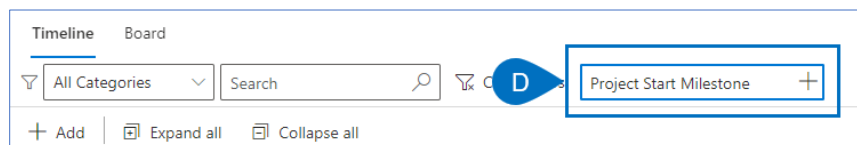
- a. Open the project in the platform and select the **Tasks** tab.
- b. Ensure that the project is using the platform **Scheduler** rather than an external schedule tool by ensuring that the text **Link to a project** is visible, as opposed to an external tool icon.



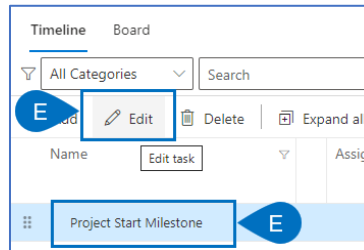
- c. Click **Timeline** from the sub-ribbon.



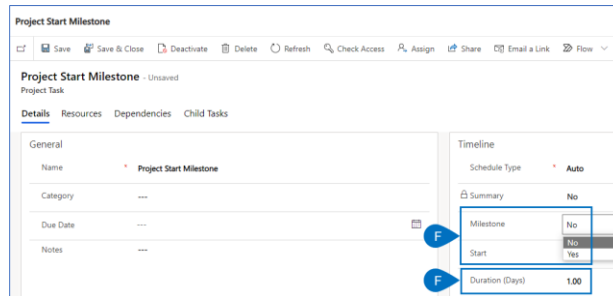
- d. Create a **project start milestone** as the first line in the new schedule. Type "Project Start Milestone" into the **Add Task** box and hit **Enter**.



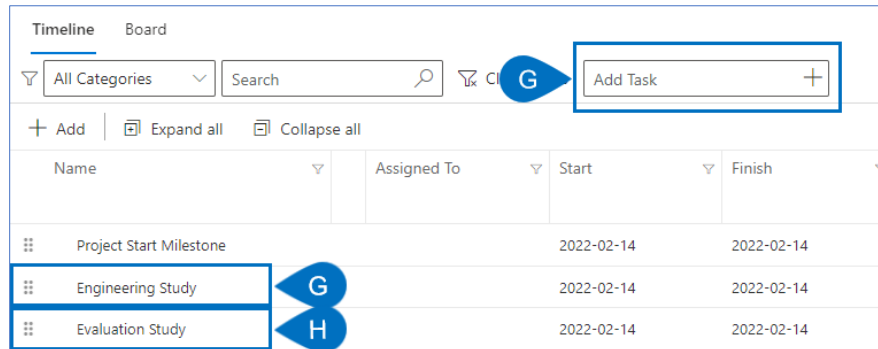
- e. **Select the task** just created and click **Edit** from the sub-ribbon.



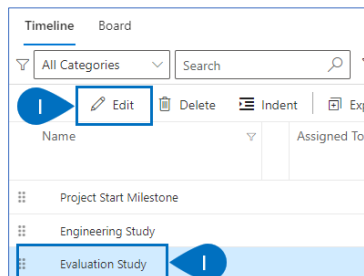
- f. Set the **Milestone** flag to **Yes** or set the **Duration** to **zero** to make it a Milestone.



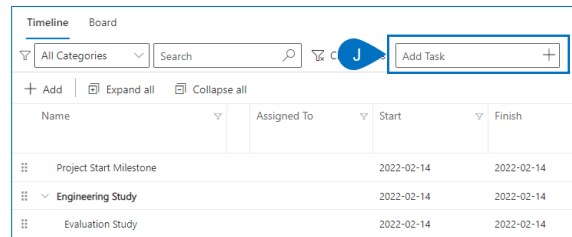
- g. Define the first phase of the project by typing the **phase name** in the **Add task** box.
h. Continue to add the first **deliverables** in the same way.



- i. Select the **Deliverable** and click **Indent** from the sub-ribbon.

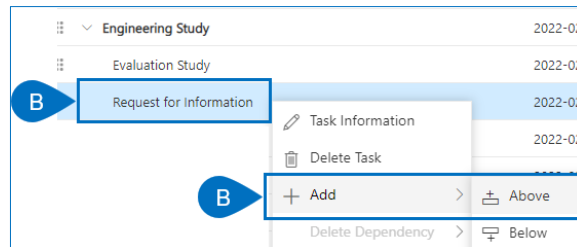


- j. Continue to add **Milestones**, **Phases** and **Deliverables** in the same way.

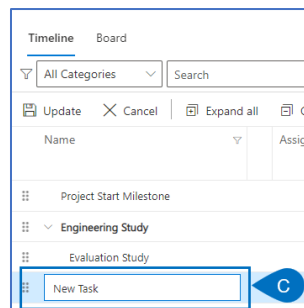


2. CAPTURE PROJECT SUB-DELIVERABLES

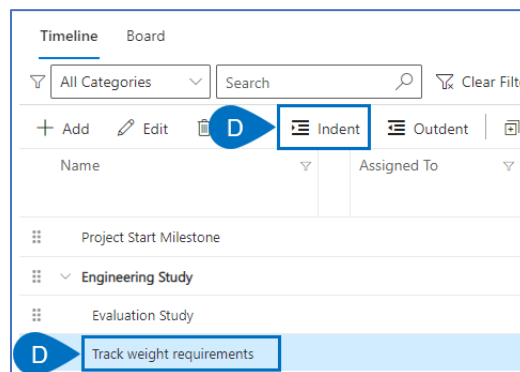
- With the Phases, Deliverables and Milestones identified, the high-level Work Breakdown Structure (WBS) is complete. Now we need to decompose the WBS into sub-deliverables (if needed) and tasks (to be discussed in the next section).
- Insert a new line** between the first two deliverables by **right-mouse clicking** on the second deliverable and select **Insert Above**.



- Type the name of the sub-deliverable.



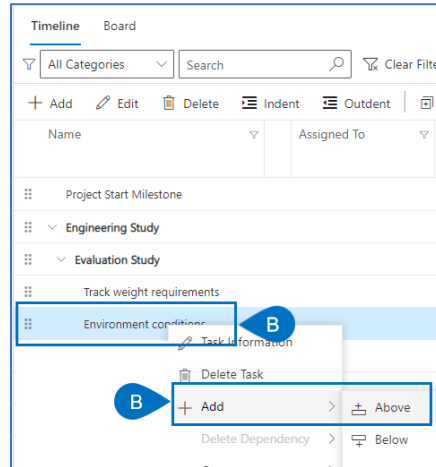
- Select the new sub-deliverable and then click **Indent** from the sub-ribbon.



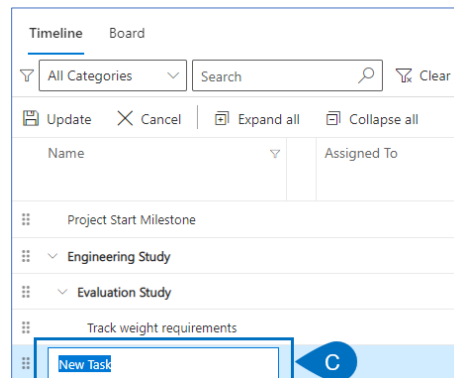
- Continue to decompose the WBS as required.

3. CAPTURE PROJECT TASKS

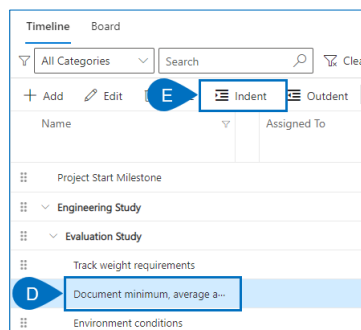
- a. The final level of decomposition is to decompose the sub-deliverables into **detailed tasks**.
- b. **Insert a line** between the first two sub-deliverables by **right-mouse clicking** on the second deliverable and select **Insert Above**.



- c. **Type the name** of the task.



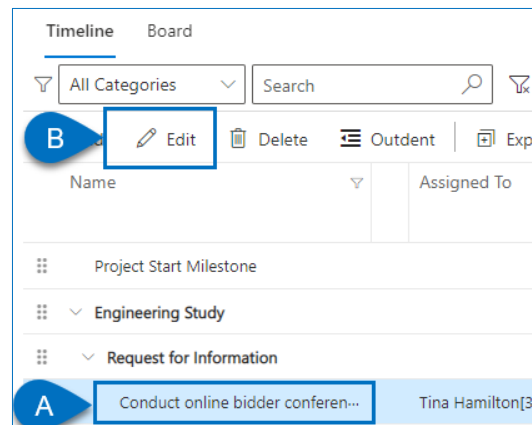
- d. **Select the new task.**
- e. Click **Indent** from the sub-ribbon.



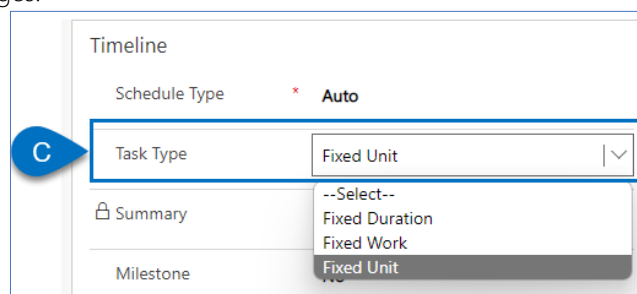
- f. Continue to decompose the WBS as required.

4. SET TASK TYPE

- a. Select the **task** you wish to set the task type for and click **edit** from the sub-ribbon.



- b. Set the **Task Type** as appropriate for each task's delivery characteristics.
- If the type is **Fixed Duration**, the duration of this work is set, and it won't change, even if you modify resources/units or work on the task.
 - If the type is **Fixed Work**, the work for this task is set, and it won't change, even if you've changed the duration or if resources/units change.
 - And finally, If the type is **Fixed Unit**, the number of resources assigned to the task is set and it won't change, even if the duration or work changes.



Identify the work using the Board view



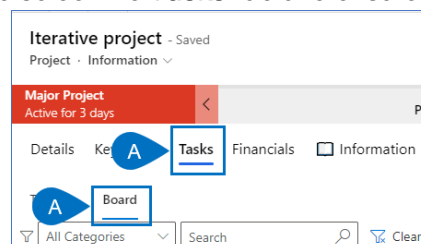
Project Manager



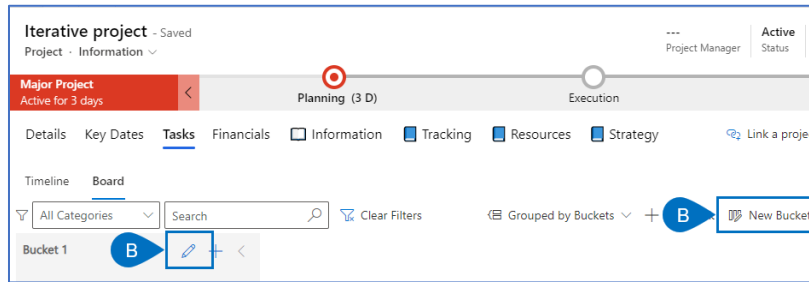
Built-in Scheduler

1. CONFIGURE THE BOARD

- a. Open the project in the platform and select the **Tasks** tab and ensure you are on the **Board** view.



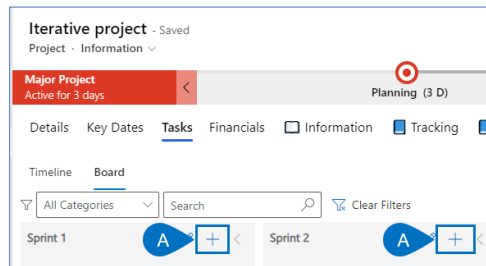
- b. Configure the board by creating **buckets** (columns, Kanban processes) as appropriate for the project delivery approach by clicking the **Pencil** icon to edit an existing bucket or clicking **New Bucket** and giving the new bucket an appropriate name.



- c. Continue to add **buckets** until the board is fully defined.

2. CAPTURE STORIES

- a. Capture the first story for the project by clicking the **+** sign from the appropriate column.



- b. Define the story details.

Quick Create: Project Task

Name

A

Category

General

Bucket

Sprint 1

Schedule Type

Auto

Milestone

No

Start

2/22/2022

Duration (Days)

1.00

Finish

2/22/2022

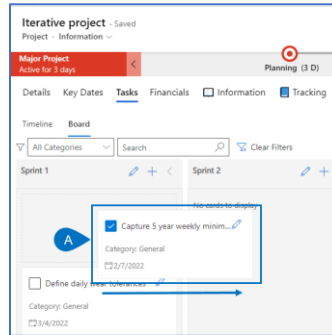
Effort (Hours)

0.00

- c. Continue to add stories to the project in the same way.

3. ORGANISE THE BOARD

- Ensure the stories are in the correct column/bucket by **dragging and dropping** them into the appropriate location.



Establish dependencies



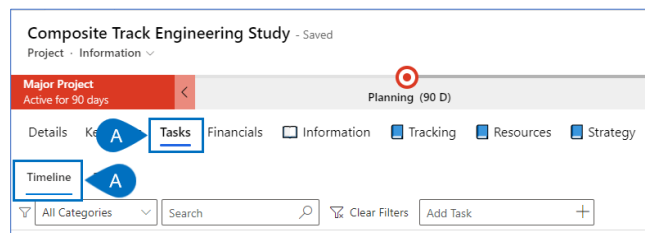
Project Manager



Built-in Scheduler

1. CREATING DEPENDENCIES IN THE TIMELINE VIEW

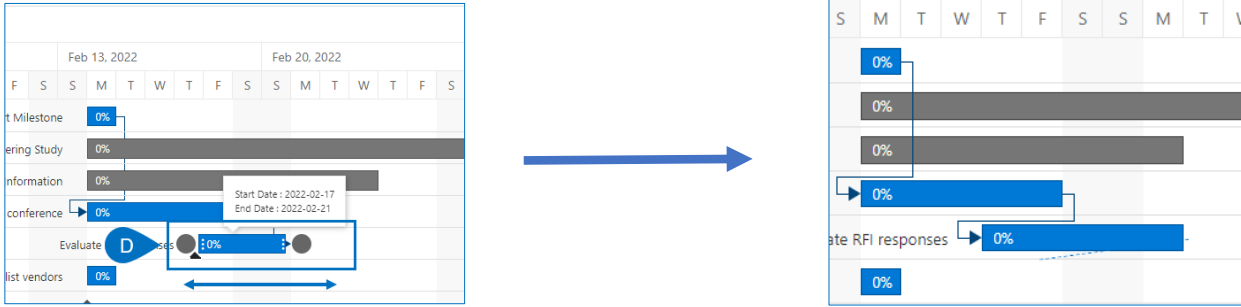
- Ensure you have the appropriate project open in the platform with the **Task** tab selected and the **Timeline** view active.



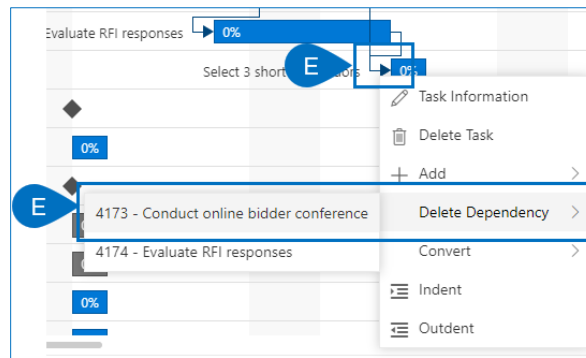
- Hover your mouse** over the **end of the Gantt bar for the successor**, and then click and drag to the **beginning of the successor task**. Release the mouse to create the dependency.

Timeline		Board	
All Categories		Search	
+ Add		Clear Filters	
Expand all		Add Task	
Collapse all			
Name	Assigned To	Start	Finish
Project Start Milestone		2022-02-14	2022-02-14
Engineering Study		2022-02-14	2022-03-14
Request for Information		2022-02-14	2022-02-14
Prepare RFI		2022-02-14	2022-02-14

- Create additional dependencies in the same way.
- Gaps and Overlaps** can be created by dragging the Blue Gantt bar.



- e. Dependencies can be deleted by **right-mouse clicking** on the end of the dependency arrow and selecting **Delete Dependency** and selecting the appropriate one to delete.



Assign Resources



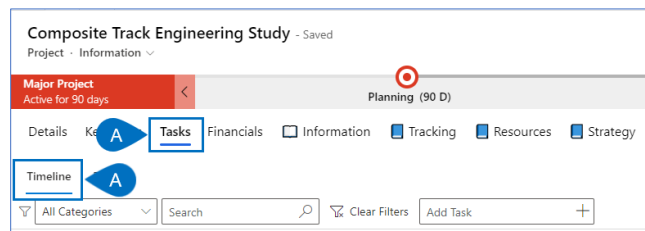
Project Manager



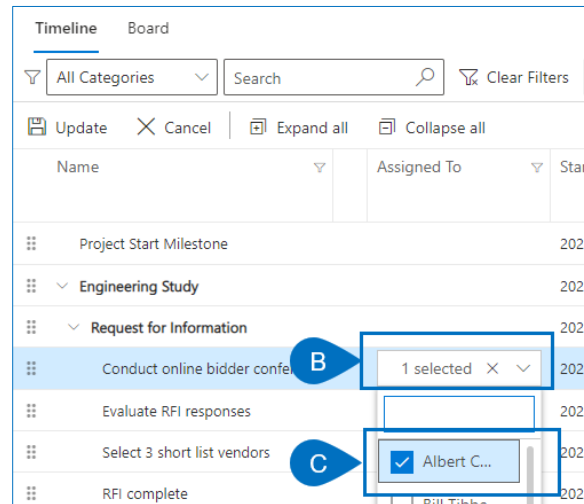
Built-in Scheduler

1. ASSIGN RESOURCES

- a. Ensure you have the appropriate project open in the platform with the **Task tab** selected and the **Timeline** view active.

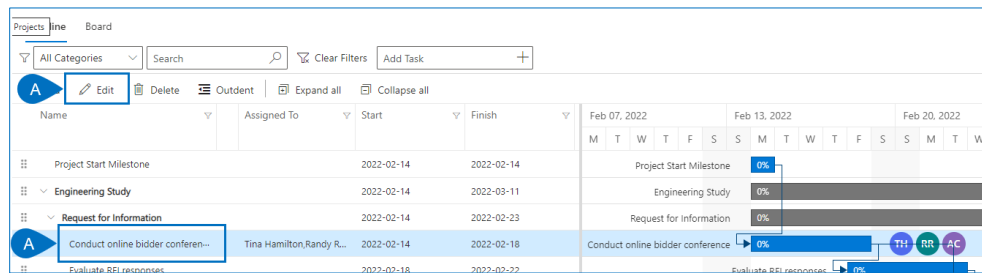


- b. Double click in the Assigned to cell for the task you wish to add resources.
- c. Select the Down-arrow and select the resource(s) to be assigned to the task.

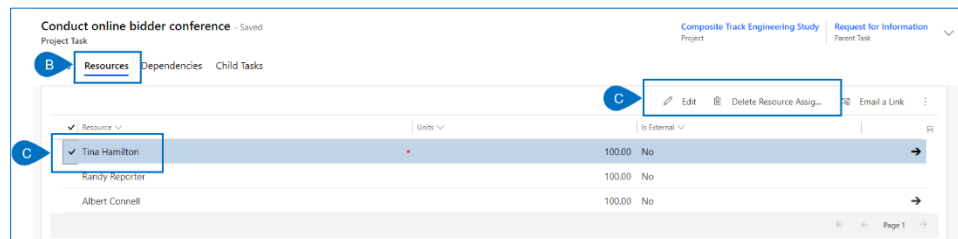


2. VIEWING AND ADJUSTING RESOURCE ASSIGNMENTS

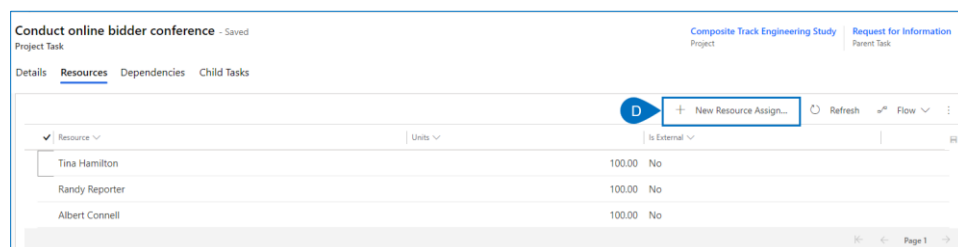
- Select the task you wish to view resource assignment details on and click **edit** from the sub-ribbon.



- Click on the **Resources** tab.
- View and update (or delete) details related to the resource assignments.

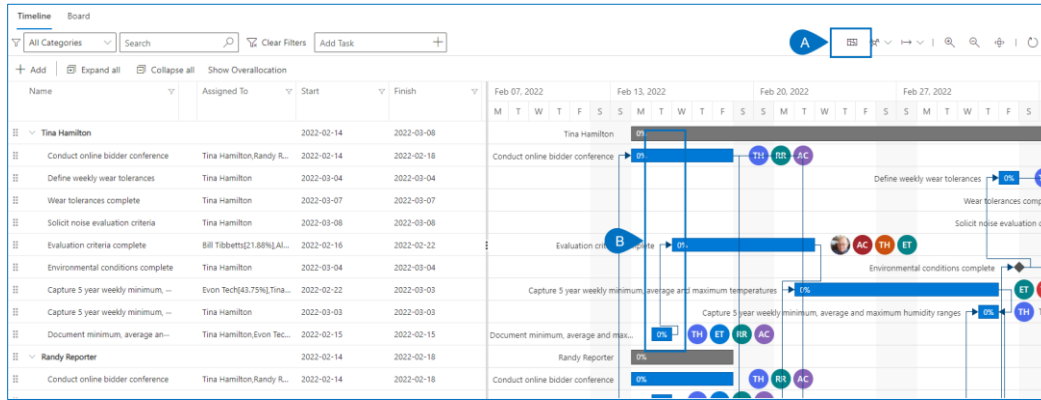


- Additional resources can be added to the task by selecting **+ New Resource Assignment**.



3. VALIDATING RESOURCE ASSIGNMENTS

- The **Resource** view allows you to view the project assignments from a **Resource centric view**.
- This will allow you to **confirm availability of your resources** to complete assigned tasks, specifically when a resource is working on **multiple tasks in parallel**.



Estimate the work



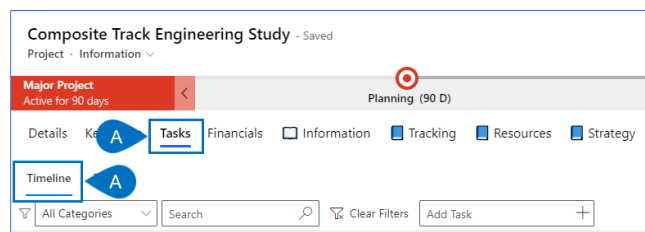
Project Manager



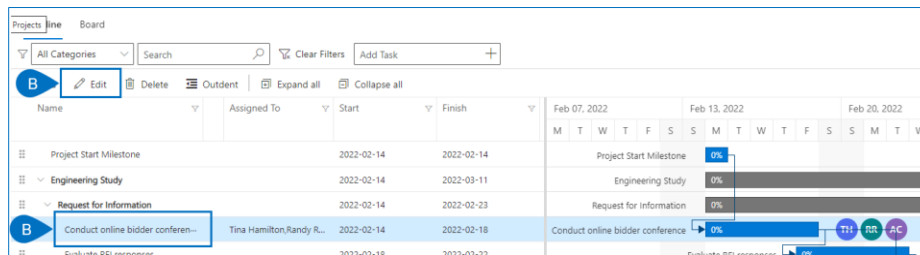
Built-in Scheduler

1. ESTIMATING THE WORK

- Ensure you have the appropriate project open in the platform with the **Task** tab selected and the **Timeline** view active.



- Select the **task** you wish to view resource assignment details on and click **edit** from the sub-ribbon.



- Ensure you are on the **Details** tab.
- Enter both the **Duration** and the **Effort estimates** for the task.

Open in new window

Conduct online bidder conference - Saved

Project Task

Details B Dependencies Child Tasks

General

Name * Conduct online bidder conference

Category ---

Due Date ---

Notes ---

Board

Sprint ---

Bucket ---

Size ---

Timeline

Schedule Type * Auto

Summary No

Milestone No

Start 2022-02-14

Duration (Days) 9.00 C

Finish * 2022-02-19

Effort (Hours) 120.00 C

Effort Completed (Hours) 0.00

Effort Remaining (Hours) 120.00

Percent Complete 0

- e. If required, from the **Resources** tab adjust the **distribution of the work between the resources** assigned to the task.

Conduct online bidder conference - Saved

Project Task

E Resources Dependencies Child Tasks

Edit

Resource	Units	Is External
Tina Hamilton	33.00	No
Randy Reporter	33.00	No
Albert Connell	34.00	No