ScheduleReader™

User Manual

Windows

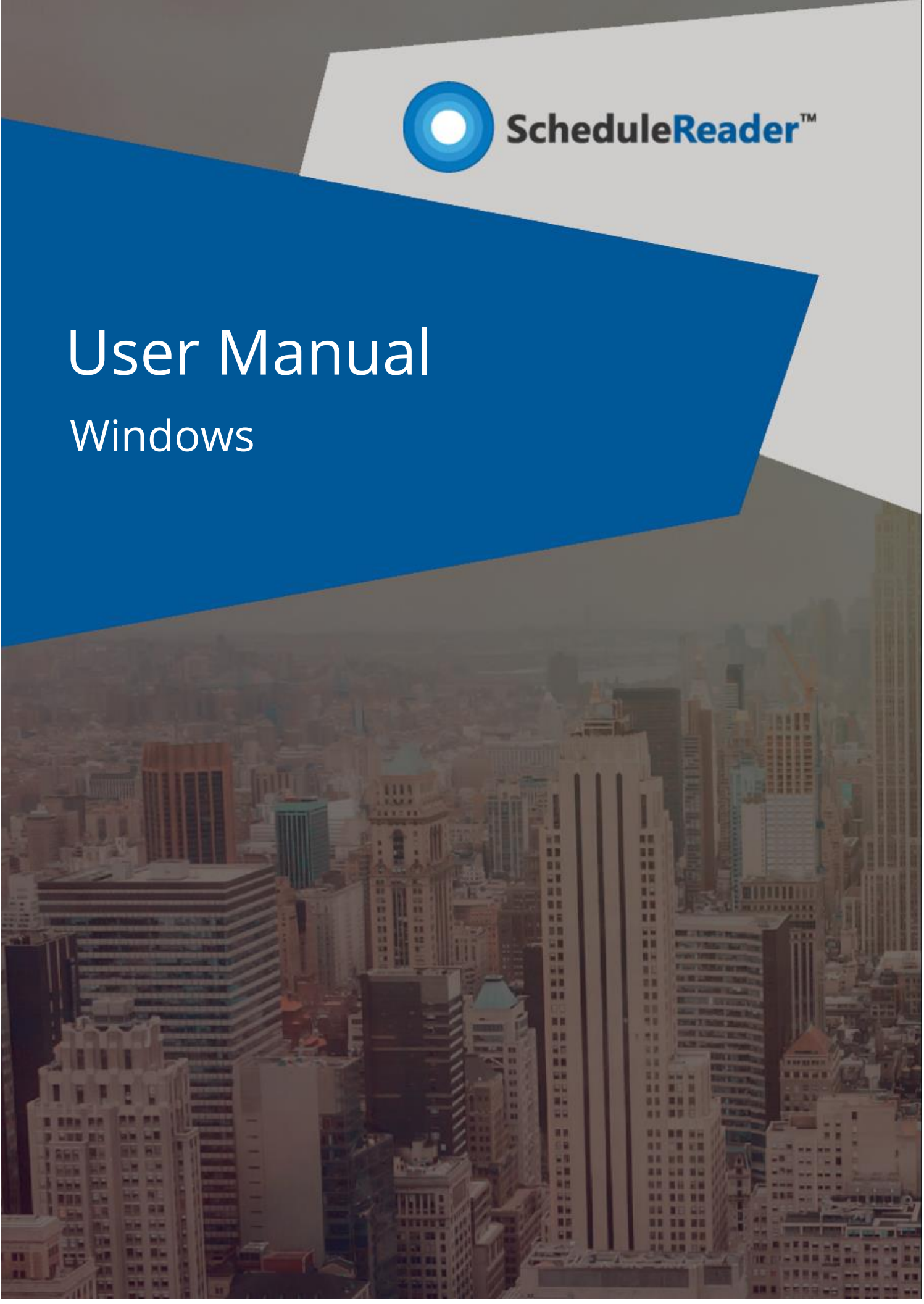


Table of Contents

Welcome to ScheduleReader™

INTRODUCTION

ScheduleReader™ is a **stand-alone** application that allows you to **open** and **view** projects exported from Oracle® Primavera P6®. It supports the import of native **XER** and **.xml** file format. ScheduleReader™ is designed to convert data from a project file and visually display the schedule progress over time.

ScheduleReader™ User Interface (**UI**) is very **intuitive** and easy to use. The UI incorporates the Table view, Gantt view and Details view while all functionalities are placed in the Ribbon.

VIDEOS AND TUTORIALS

Quick video tutorials with tips and tricks for getting the most out of ScheduleReader™. These walkthroughs are perfect to learn how to use ScheduleReader™.

Watch online

SUPPORT AND DOCUMENTATION

We recommend you to visit our page *http://www.schedulereader.com/* to find more documents and videos about ScheduleReader™. If you have any questions or you need further assistance while working in ScheduleReader™ please contact our support team at *customercenter@schedulereader.com*

What's new in ScheduleReader™?

WHAT'S NEW IN SCHEDULEREADER™ VERSION 9.1

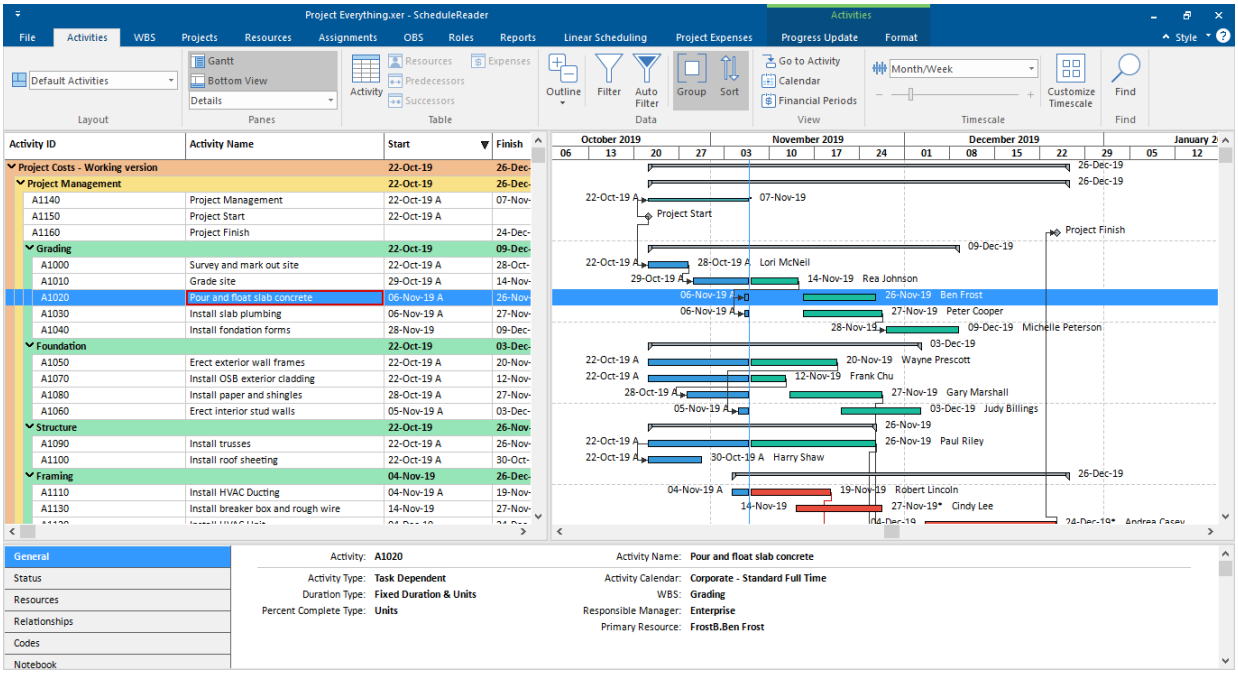
New Features:

- Role Codes
- Role Codes in Role Details View
- Assignment Codes in Assignment Details View
- Project User Defined Fields in Assignment view
- Resources User Defined Fields in Assignment view
- WBS User Defined Fields in Assignment view
- Project Codes in Assignment view.

Getting started with ScheduleReader™

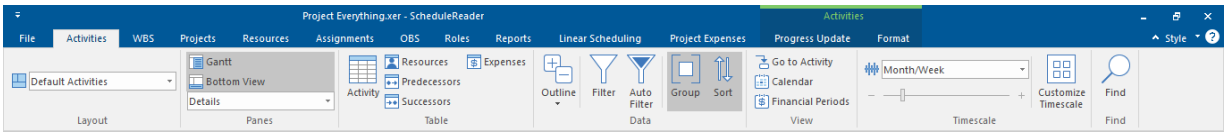
WORKSPACE

Users can **quickly get started** to work because the ScheduleReader™ user interface is very **intuitive**, as shown in the figure below.



RIBBON

All application features are placed on the **ribbon,** at the top of the screen, grouped by their similarities and functionalities. The main windows in ScheduleReader™ are given in different **ribbons**:



- **Activities -** view the open project activities
- **WBS -** view the Work Breakdown Structure that must be accomplished to complete a project.
- **Projects** - view the graphical representation of the project hierarchy that exists in your enterprise (EPS).
- **Resources -** view the resource structure and get details.
- **Assignments -** view resource cost and quantity information in the spreadsheet.
- **OBS -** view Organizational Breakdown Structure.
- **Role -** view the roles assigned to resources**.**

- **Reports** – view the project status through graphical reports.
- **Linear Scheduling** - view the project plan in the time-location diagram.
- **Project Expenses** - view the assigned expenses to each activity of the project plan.
- **Progress Update** view for inserting proposal for updates for activities and assignments

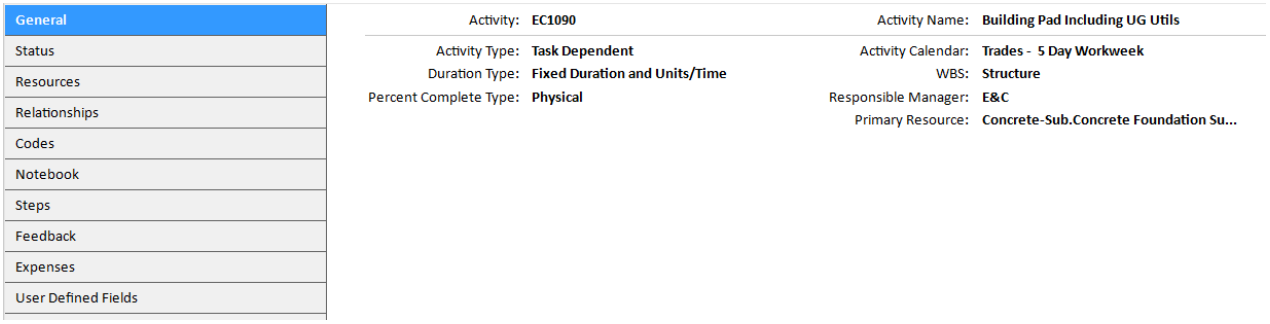
Besides the standard ribbons, ScheduleReader™ contains the so-called **Format** ribbon, that has features for customizing the Gantt Chart in the Activity view.

The Ribbon is designed to help you quickly find the functionalities that you need to complete an action.

You can expand the ribbon to view all functionalities in an active tab or **minimize the ribbon** to extend the workspace. Use the shortcut key **CTRL+F1** to perform this action.

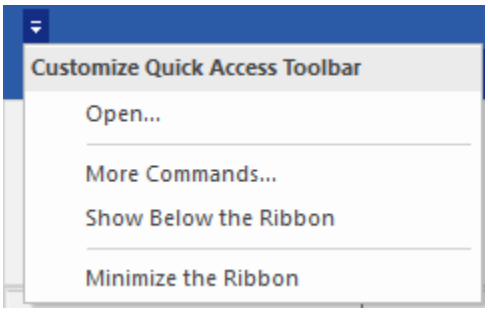
DETAILS

Display **detail information** for a selected element of an active view such as project, WBS, activity and resources, at the bottom of the screen.



QUICK ACCESS TOOLBAR

Customize your quick access toolbar to quickly reach your **favorite commands**. Select to show or hide the Open file dialog box. Place the toolbar above or below the ribbon. Option to minimize or maximize the ribbon.



FILE

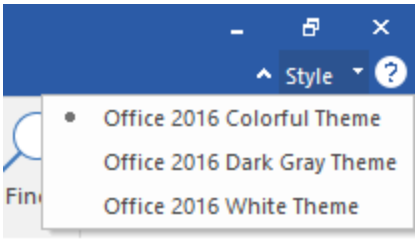
The first tab of the ribbon is the **File** menu which includes the following commands:

Open	Select a file to open from a location.

Info	View file properties and application information.
Recent	List of the recently open files.
Options	Set User preferences.
Layouts	Create, import or export custom layout.
Baselines	Compare several updated versions of the project file
Print	Define the print setting for your projects.
Reports	Import or export custom reports.
Exit	Close application.

STYLE

You can change the **application theme** from the Style drop-down menu placed in the upper right corner of the screen.



ABOUT

Application information such as version, build and the copyright is given under ***File*** → ***Info***.

View project

OPEN FILE

In ScheduleReader™ you can import project data exported from Oracle® Primavera® P6 in the following file formats:

1. **XER -** the Oracle® proprietary format,
2. **XML** - designed to store and transport data with the Oracle P6 scheme.

There are two ways how you can open file:

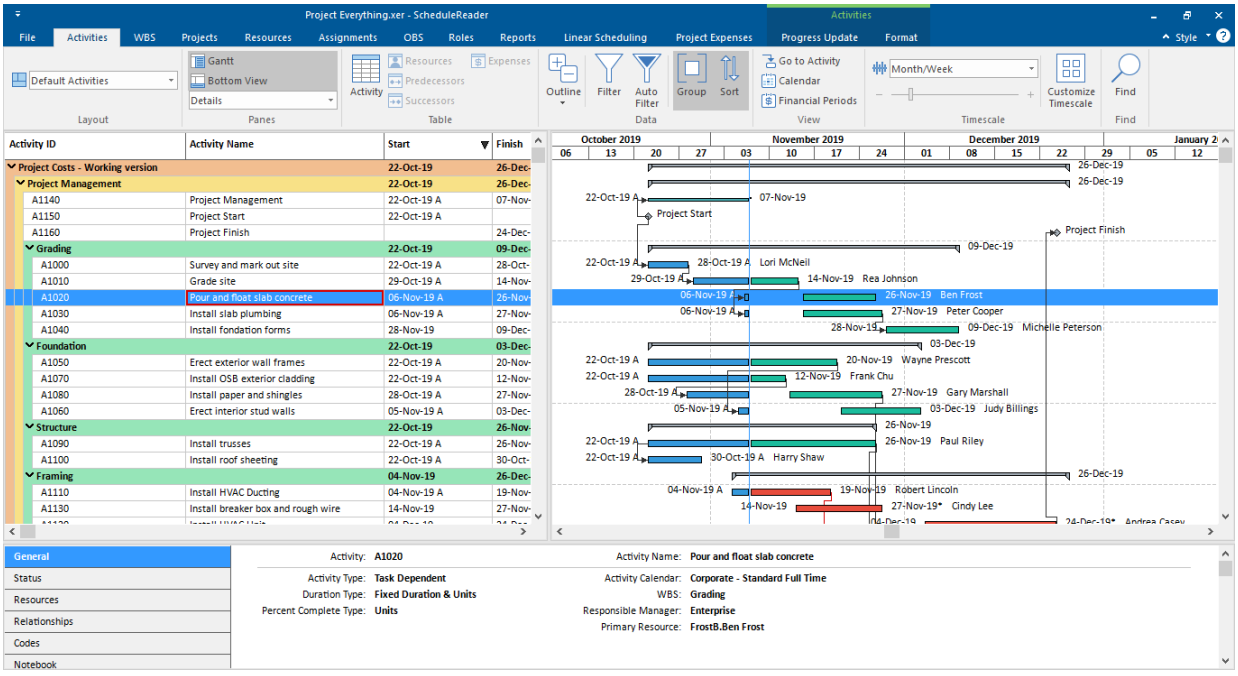
1. From **File** click to **Open** and select file from your location
2. **Drag and drop** files in the main window of ScheduleReader™.

VIEW PROJECT STATISTICS

When you import file in ScheduleReader™ the application converts the data and visually presents project progress over time. Select a tab from the ribbon to get project insights as described below.

Activities view

Activities are project elements that define the work that should be performed in a specific period of time. Use the Activity tab to view details for the open project. The activity view is divided between the **Activity Table** on the left side, the **Gant chart** on the right side, the **ribbon** at the top and the **details** view at the bottom of the screen as shown in the figure below.



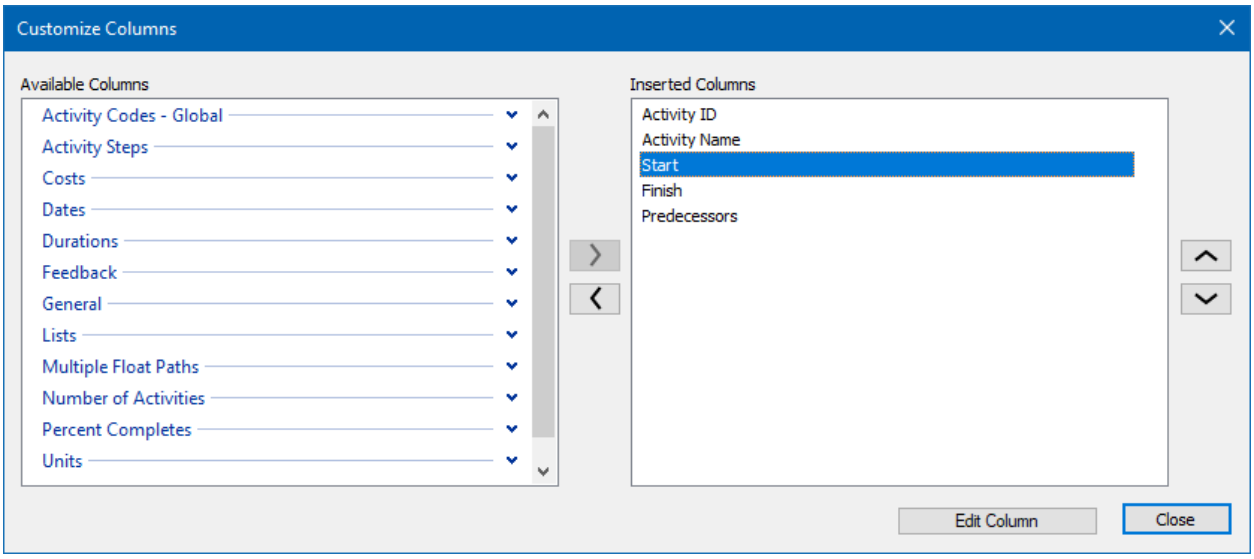
Activities tab

The following functionalities are placed in the Activity tab of the ribbon:

Layout	Choose how project data is displayed in the currently active view. Each layout shows different columns and applies different groping and sorting of data.
Bottom view	Show on bottom project information details for the selected activity or the Trace Logic view.
Gantt	Provides a graphical view of schedule progress over the course of a project. Click to show or hide the Gantt chart.
Activity table	Add/Remove columns for a project.
Resources table	Customize columns for resources assigned to the selected activity.
Predecessor table	Customize columns for activities assigned as predecessors.
Successor table	Customize columns for activities assigned as successors.
Expenses table	Customize columns for expenses assigned to the activity.
Expand All	Expands all collapsed items in a hierarchical table view.
Collapse All	Collapses all expanded items in a hierarchical table view.
Collapse to level	Select a level to collapse to items in a hierarchical table view.
Go to activity	Navigate to the selected activity in the Gantt chart view.
Relationship Lines	Show/Hide relationships in the Gantt chart view.
Calendar	View details for assigned global, project and resource calendars.
Financial Periods	View project's period performances
Timescale	Adjust the timescale to reflect your planning period.
Customize Timescale	Select the date format when showing the project's primary or ordinal dates as well as labels for the ordinal dates.
Filter	Filter the activity view based on selected criteria.
Auto filter	Filter data in the activity view based on cell values.
Group	Group the activities in the view by specific criteria.
Sort	Arrange the activities in the table in the custom order in ascending or descending sort order.
Find	Find items in the current Table view.

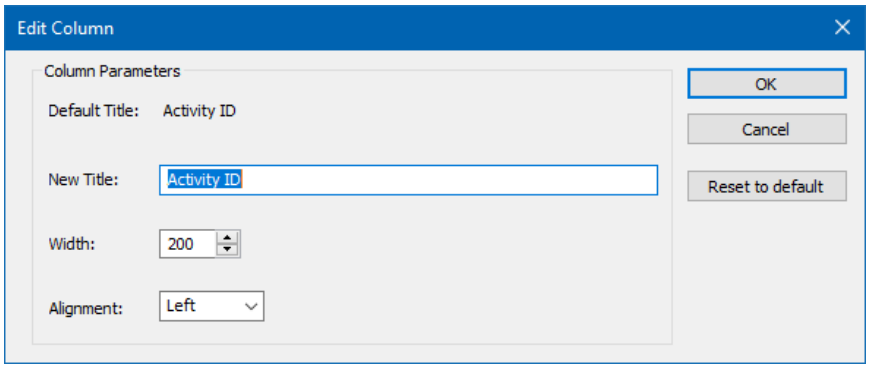
Activity table

Activity data is given in multiple columns of the Activity table. To add or remove columns in the Activity table click on the **Activity Table** button. The **Customize Columns** dialog box will be opened. From the **Available columns** list, select the desired Column and **add** to the right by clicking on the arrow. To apply the changes, simply close the window.



You can **change the order** of the columns in the Activity table, by dragging and dropping a column header to the desired position.

Using the **Edit Column** functionality, the user can rename the existing columns in terms of adding a title that is different from the field's name and align it according to the specific need. The **auto-resize** functionality**,** every column will be resized according to the longest cell value eliminating the need for manually resizing.



Activity details view

Enable **details** to be shown on the bottom of the activity table. Select an activity from table to view detailed information for it as presented in the following tabs:

General	General information for ID, name, activity and duration type, calendar, % complete, WBS, responsible manager and primary resource.
Status	Provide information for activity durations, dates and constraints.
Resources	Details for resources assigned to the selected activity.
Relationships	Displays predecessors and successors of the selected activity in two, separate tables.
Expenses	Displays the expenses that are assigned to the selected task.
Codes	Activity codes and values enable you to filter, group, sort, and report activity information. View assigned activities codes, values and descriptions.

Notebook	Activities notes.
Steps	Used to break activities down into smaller units and track the completion of those units. Calculate activity percent complete based on the weight you assign to each activity step.
Feedback	View the feedback from various sources related to the specific activity.
User defined fields	View the activity UDF assignments for the selected activity.

Trace Logic View

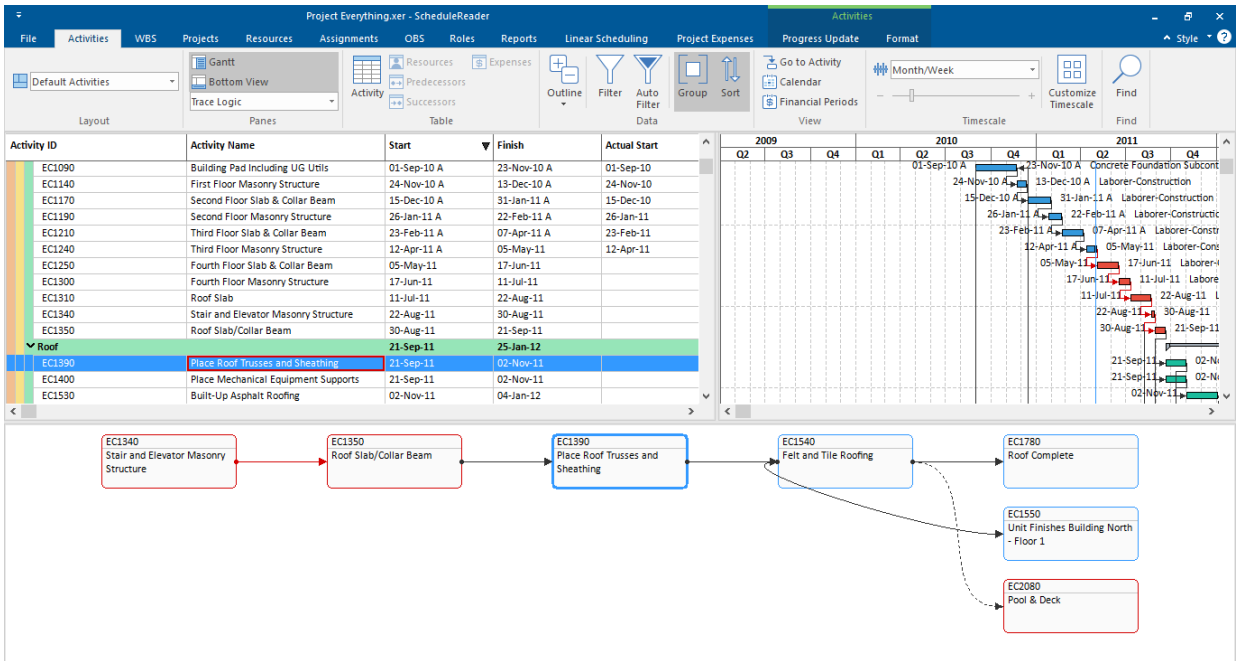
Trace Logic view is a special view that is always used in combination with the Activity view. It enables you to step or "trace" forward and backward through a sequence of activities, so you can focus on predecessor/successor relationships. It is usually used by Project managers and schedulers to examine why an activity is scheduled to occur at a particular time. This way you can easily determine if an activity's predecessors were delayed or if existing constraints are still applicable. You can also see if relationship types portray the sequence in which the activities should occur.

In order to display the Trace Logic View, do the following:

1. In the ***Activities*** ribbon tab, select the ***Bottom View*** option.
2. In the drop-down menu, choose ***Trace Logic*** from the drop-down menu.

Activities in the Trace Logic view are presented as boxes and the lines that connect these boxes are the relationships that exist between the activities.

You can **customize the design** of the Trace Logic view, by using the formatting options in the ***Activities Format*** ribbon tab. Here you can change the level of predecessors and successors, type of information which is inside the boxes and the zoom level applied to the view.



Resource Usage Profile view

Resource Usage Profile view is the second view that is applied through the bottom view and can be viewed only in combination with the Activity view. Using the Resource usage Profile view, you can make an analysis of the number of units or costs for the resources and roles that are assigned on the project. After selecting the role that will be analyzed and the timescale is set to the right size, select that project information will be displayed: Units or Costs.

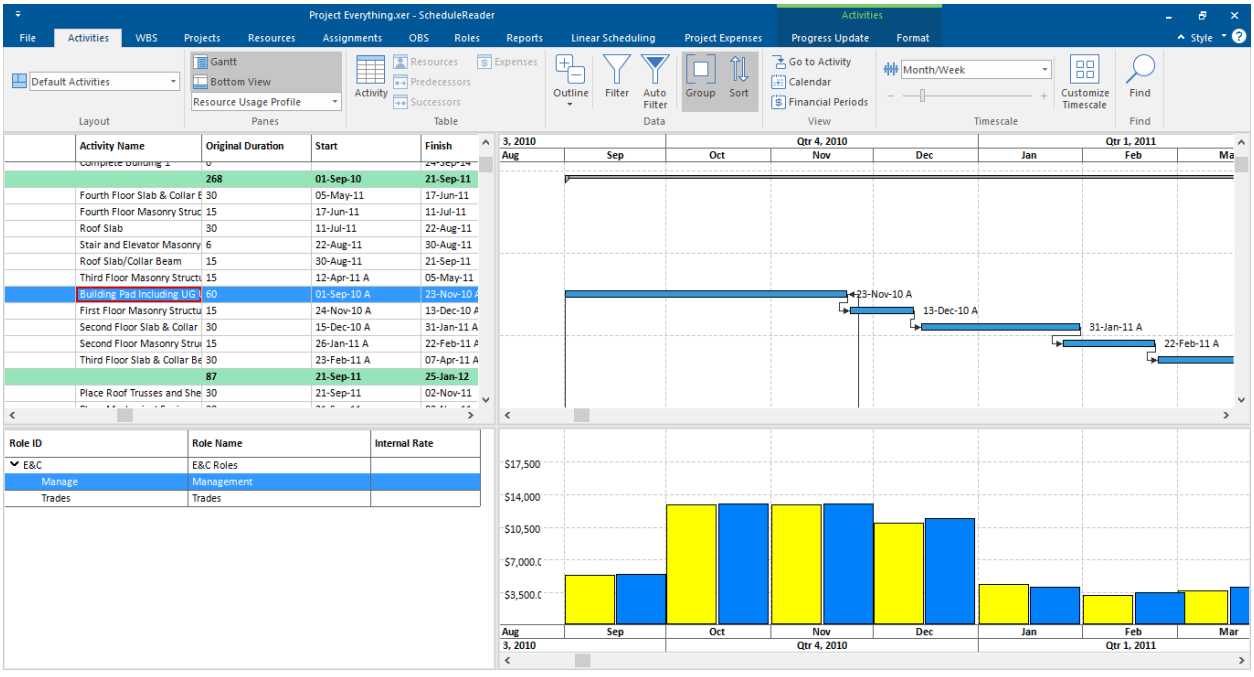
Resource Usage Profile view can help project managers, project stakeholders, team leads and other project participants to:

- Determine the work capacity for each resource or role in the project plan;
- Identify the overallocated resources or roles;
- View the maximum allowed scheduled units for each resource or role in the project plan;
- Analyze the cumulative costs and labor units during project execution.

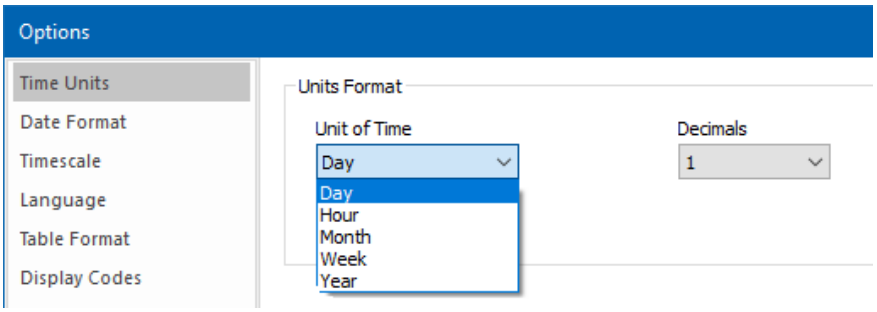
A very important remark is that for the resources and roles, the Resource Usage Profile view can be used for viewing units and costs only for the projects that are exported in the XER file.

To display the Resource Usage Profile view, do the following steps:

1. In the ***Activities*** ribbon tab, select the ***Bottom View*** option;
2. In the drop-down menu, choose ***Resource Usage Profile*** from the drop-down menu.



Resource Usage Profile view contains vertical bars, that represent how the work or unit changes over a certain period, for selected resources or roles. For changing the units that are used for displaying the data you have to go to Options dialog and in the Time Units sub-menu select the appropriate unit of time.



You can **customize the data presentation** of the Resource Usage Profile view, by using the formatting options in the ***Activities Format*** ribbon tab. Here you can choose which data to be displayed, the category parameters that will be presented on the chart and additional data options, such as presenting the limit, overallocation or overtime.

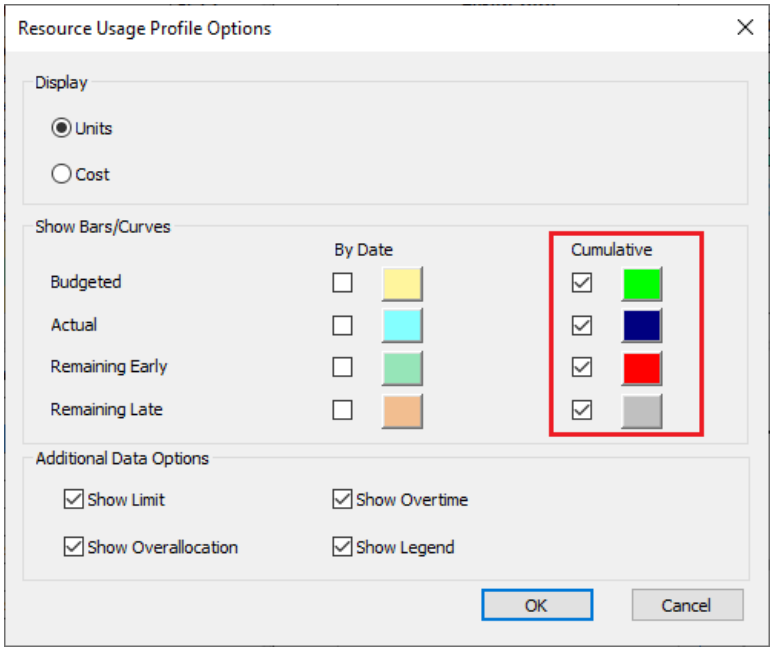
S-curves

Besides presenting the units and cost data for the project plan, ScheduleReader is capable to draw the s-curves for the selected data: units or costs. The theory defines the S-curves as "display of cumulative costs, labor hours or other quantities plotted against time". From the variety of s-curves that are applicable in project management, ScheduleReader supports the following:

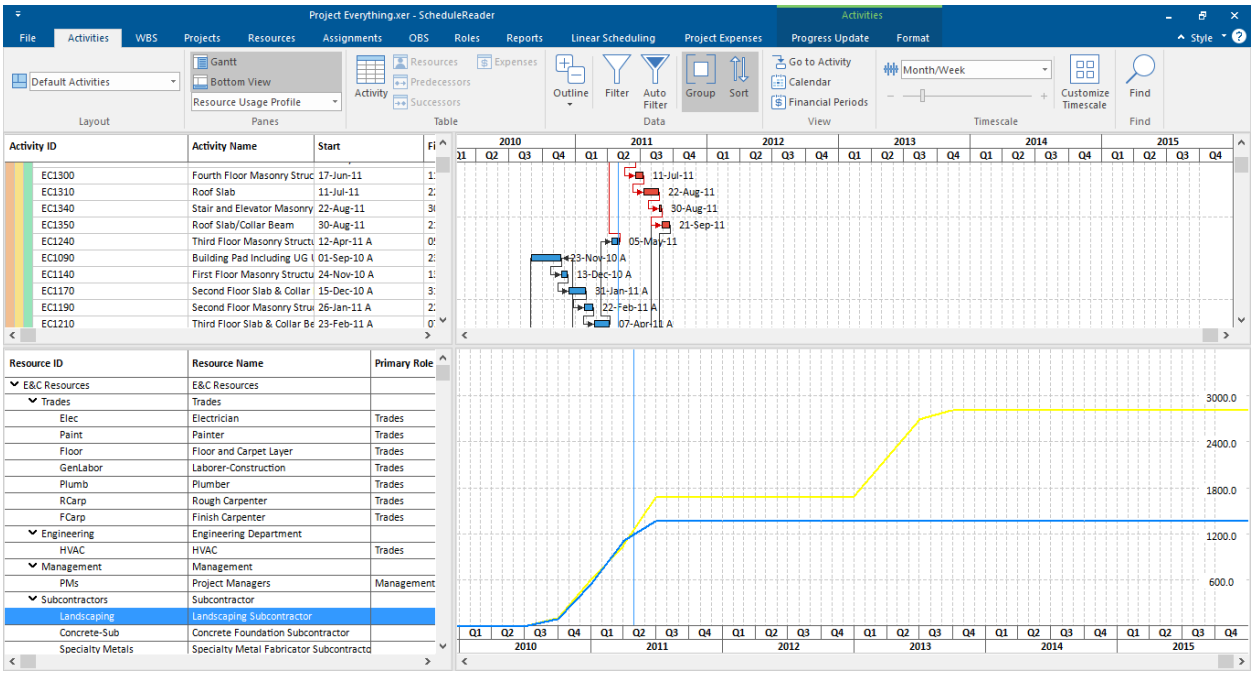
- Man Hours versus Time S-curve;
- Costs versus Time S-curve;
- Actual S-curve.

To apply the S-curves into Resource Usage Profile view, do the following steps:

1. In the ***Activities Format*** ribbon, select the **Options** feature from the Resource Usage Profile group;
2. Select any check-box from the Cumulative column (for example Budget or Actual).



The look of the S-curves in ScheduleReader is presented in the image below.



Stacked Histogram (Stacked Resource Usage Profile view)

Stacked Histogram is a very useful view when the user wants to see all resource assignment levels over time. The assignments in the view are drawn for the resources or roles, depending on the selected scheduling method. Users can choose whether to present values for “At Completion Units” or “At Completion Costs”. Values for each resource/role are presented as bar loaded on top of each other for a defined period of time.

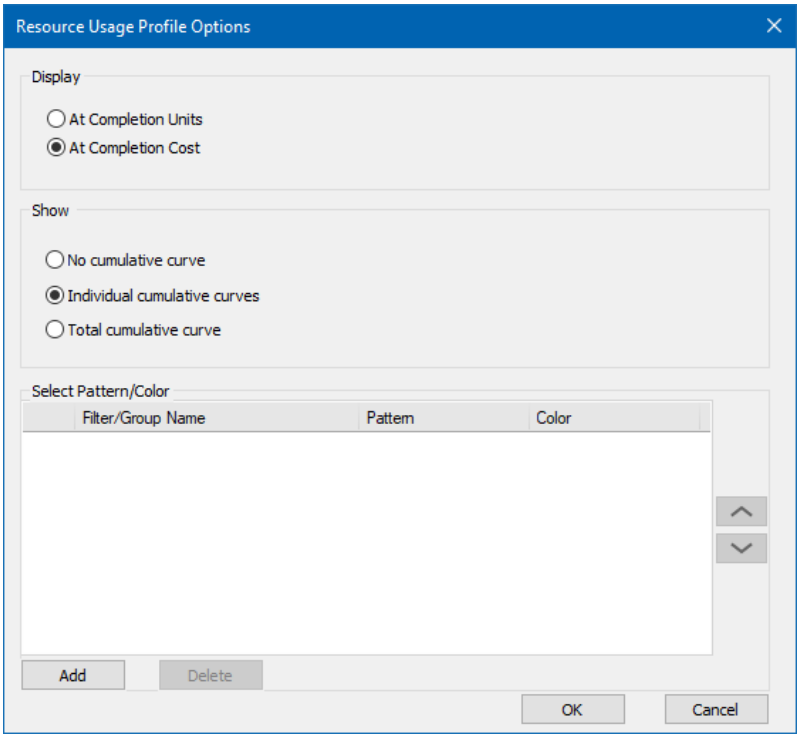
S-curves are also available in the Stacked Histogram. Users can view the cumulative S-curves for each resource or the cumulative S-curves for all resources that are assigned on the project plan.

The benefits of having and using the Stacked Histogram are numerous, but the most important are:

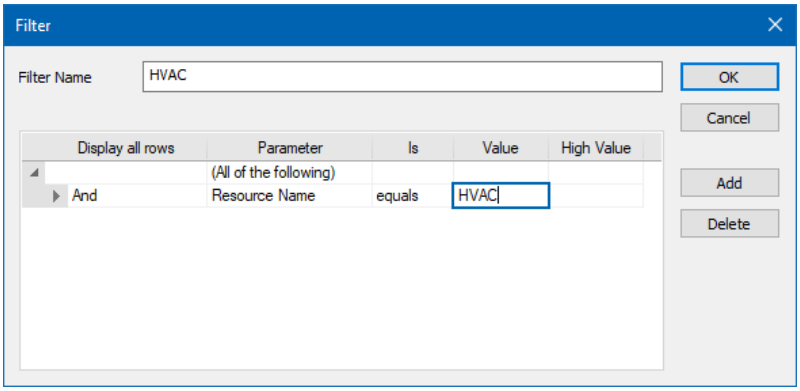
- Allows the users to analyze the trends of resources or roles allocation;
- Gives a relative proportion of the resource/role allocation over the duration of the project plan;
- Users can see how specific resource or role contribute to the total labor in a specific time period.

To display the Stacked Histogram view, do the following steps:

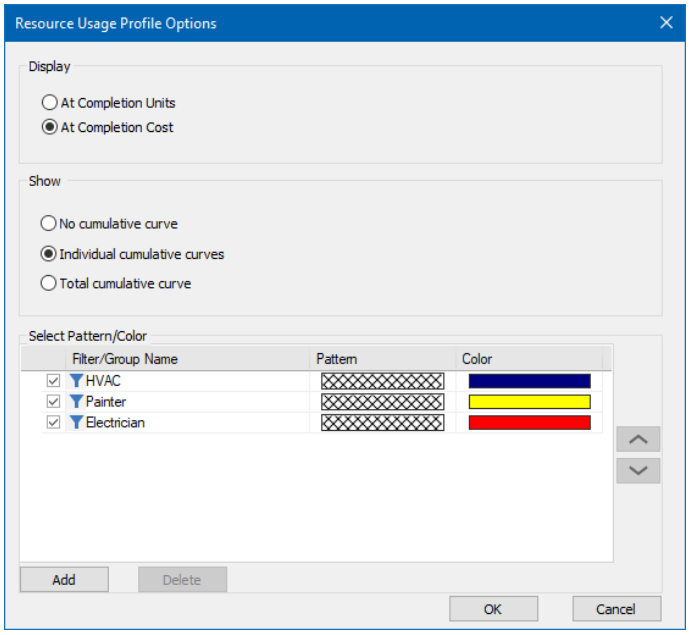
1. In the ***Activities*** ribbon tab, select the ***Bottom View*** option;
2. In the drop-down menu, choose ***Stacked Histogram*** from the drop-down menu. In the beginning, the histogram will be empty, without resources or roles;
3. Go to the **Format** ribbon and select the **Resource Usage Profile view Options**;



4. Select the parameter that will be displayed in the view. You can choose between "**At Completion Units**" or "**At Completion Cost"**;
5. You can choose to see the "Individual cumulative curves" or "Total cumulative curve". These curves are the **S-Curves**;
6. For adding resource/role in the view, click on the "**Add**" button;
7. Insert the **Filter** name and create the filter criteria. In the image below, the "HVAC" resource will be presented in the view.

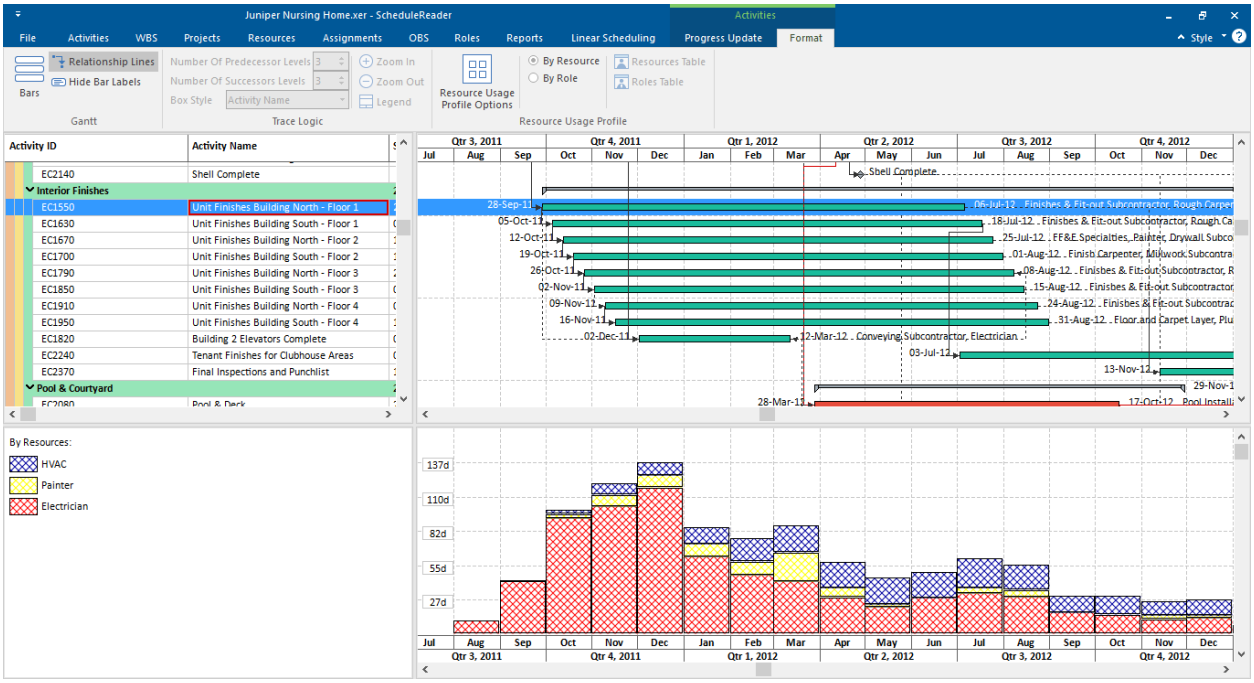


8. Repeat the previous step with different resources or roles;
9. Choose the **Pattern** and **Color** for each resource.
10. After customizing the pattern and color, the options dialog will look like the image below.



11. For presenting the resource's parameters in the view, select the check-box in front of the filter.

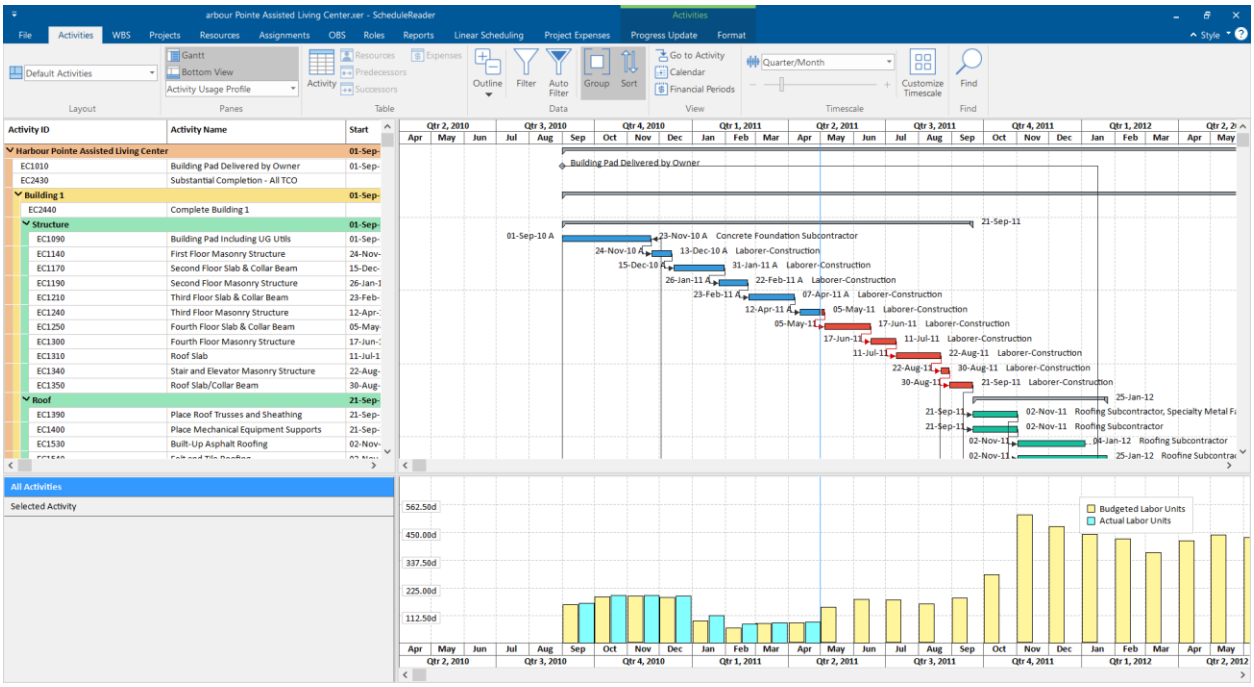
The look of the Stacked Histogram in ScheduleReader is presented in the image below.



Activity Usage Provile view

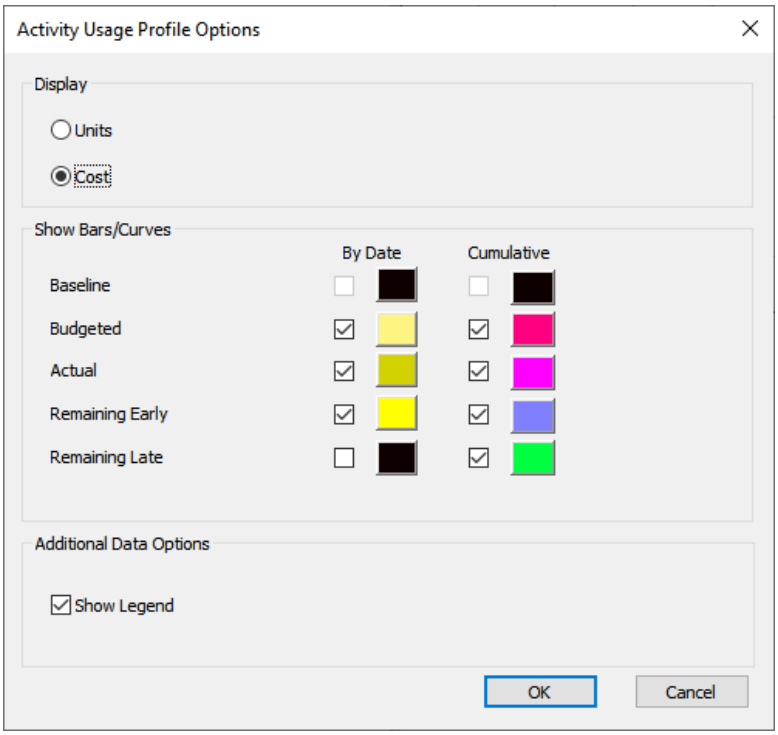
The Activity Usage Profile view presents the resource allocation for all activities in the project plan. It is an integral part of the Activity view and it is activated using the Bottom's pane drop-down list. In the Activity Usage Profile view, resource costs and units are presented.

Depending from the user's need, the allocation can be for the entire project or for the selected activity in the upper pane.



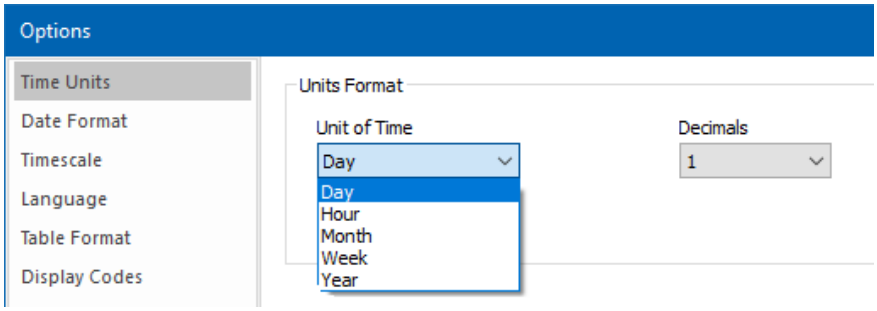
To display the Activity Usage Profile view, do the following steps:

1. In the ***Activities*** ribbon tab, select the ***Bottom View*** option;
2. In the drop-down menu, choose ***Activiy Usage Profile*** from the drop-down menu;
3. Go to the **Format** ribbon and select the **Activity Usage Profile view Options**;



4. Select the parameter that will be displayed in the view. You can choose between “**Units**” or “**Cost”**;
5. Selecting the check-boxes in the “By Date” column, the project information will be presented with **Bars**.
6. Selecting the check-boxes in the “Cumulative” column, the project information will be presented with **Curves**. These curves are the **S-Curves**;

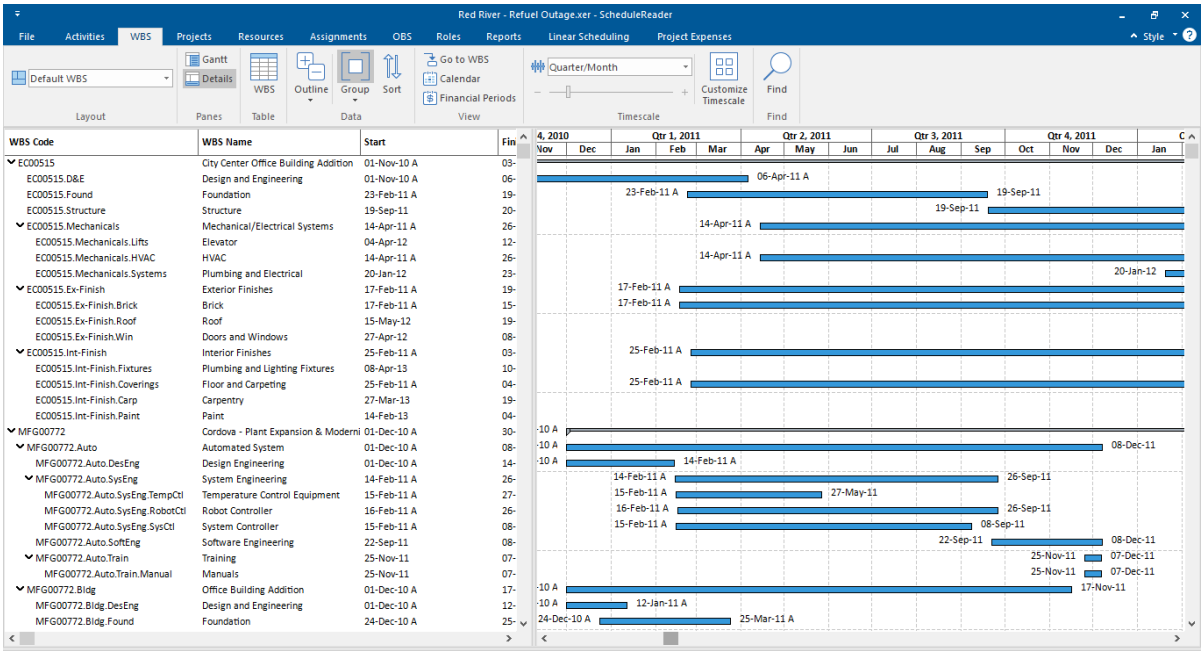
The vertical bars represent how the work or unit changes over a certain period, for selected activity or all activities. For changing the units that are used for displaying the data you have to go to Options dialog and in the Time Units sub-menu select the appropriate unit of time.



WBS view

The WBS view breaks down the project in its major deliverables, i.e. major product or service components. The Work Breakdown Structure of the project helps you maintain a top-down overview of the main project deliverables. When you create your WBS first and then the activities that fall within the project deliverables, you can maintain a focus on the final product or service, which is the whole purpose of the project.

Use the WBS tab to view the Work Breakdown Structure (WBS) for the currently open project.



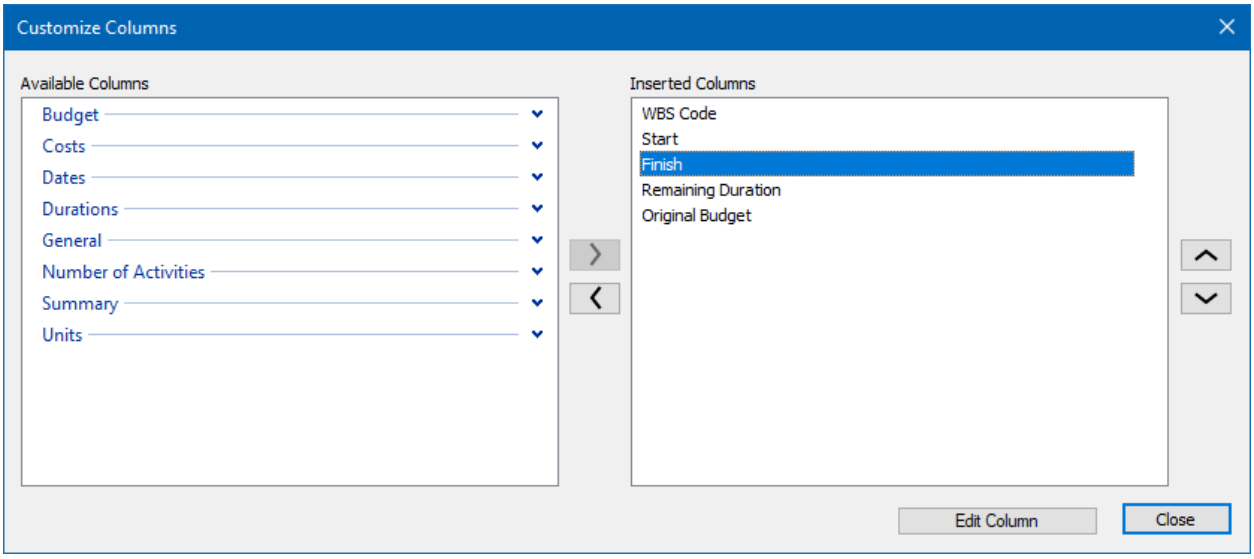
WBS tab

The following functionalities are placed in WBS tab of the ribbon:

Layout	Choose how project data is displayed in the currently active view. Each layout shows different columns and applies different groping and sorting of data.
Details	Show on bottom project information details for selected WBS.
Gantt	Provides a graphical view of schedule progress over the course of a project. Click to show or hide the Gantt chart.
WBS table	Add/Remove columns for a WBS.
Expand All	Expands all collapsed items in a hierarchical table view.
Collapse All	Collapses all expanded items in a hierarchical table view.
Collapse to level	Select a level to collapse to items in a hierarchical table view.
Go to WBS	Navigate to the selected WBS item in the Gantt chart view.
Group	Group the WBS in the view by specific criteria.
Sort	Arrange the WBS in the table in the custom order in ascending or descending sort order.
Calendar	View details for assigned global, project and resource calendars.
Financial Periods	View project's period performances
Timescale	Adjust the timescale to reflect your planning period.
Customize timescale	Select the date format when showing the project's primary or ordinal dates as well as labels for the ordinal dates.
Find	Find items in the current Table view.

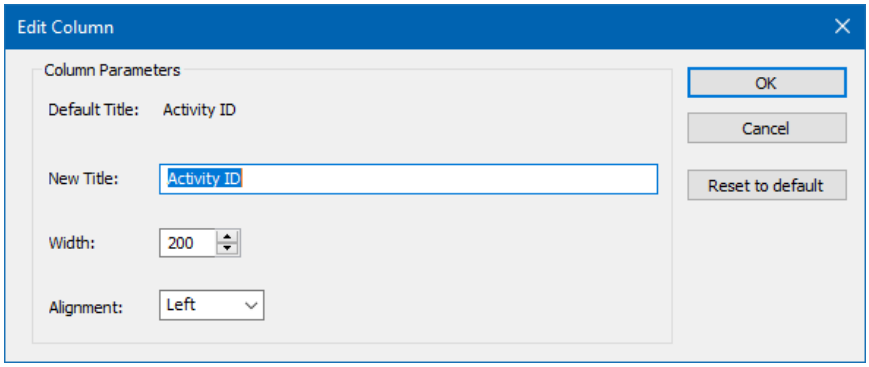
WBS table

WBS data is given in multiple columns of the WBS table. To add or remove columns in the WBS table click on the **WBS Table** button. The **Customize Columns** dialog box will be opened. From the **Available columns** select the desired ones and **add** them to the right by clicking on the arrow button. To apply the desired changes, simply close the window.



You can **change the order** of the columns in the WBS table by dragging and dropping a specific column header.

Using the **Edit Column** functionality, the user can rename the existing columns in terms of adding a title that is different from the field's name and align it according to the specific need. The **auto-resize** functionality**,** every column will be resized according to the longest cell value eliminating the need for manually resizing.



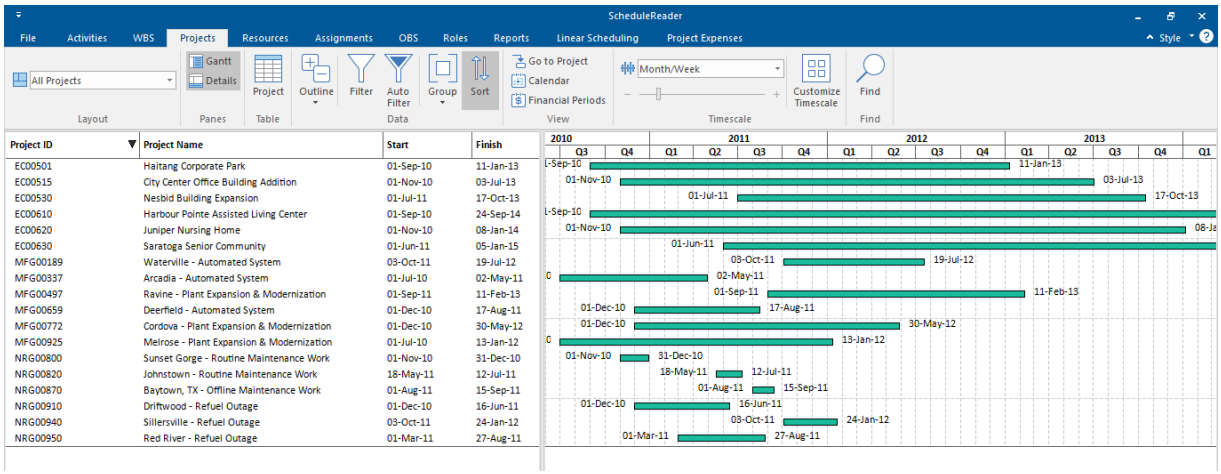
WBS details

Enable **details** to be shown on the bottom of the WBS table. Select a WBS item from a table to view detailed information for it as presented in the following tabs:

General	General information for code, name, status and responsible manager.
Notebook	View the WBS details.
User defined fields	View the WBS UDF assignments for the selected WBS.

Projects view

Use the Project tab to view the Enterprise Project Structure (EPS).



Projects tab

The following functionalities are placed under the Projects ribbon tab:

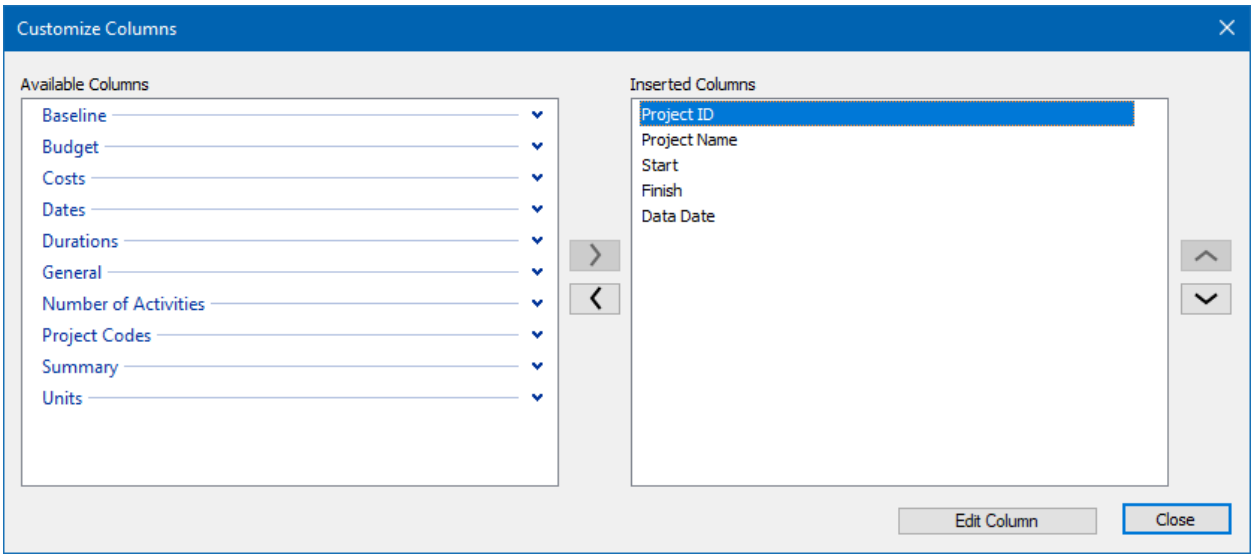
Layout	Choose how project data is displayed in the currently active view. Each layout shows different columns and applies different groping and sorting of data.
Details	Show on bottom project information details for the selected project.
Gantt	Provides a graphical view of schedule progress over the course of a project. Click to show or hide the Gantt chart.
Project table	Add/Remove columns for a project.
Expand All	Expands all collapsed items in a hierarchical table view.
Collapse All	Collapses all expanded items in a hierarchical table view.
Collapse to level	Select a level to collapse to items in a hierarchical table view.
Go to Project	Navigate to the selected project in the Gantt chart view.
Calendar	View details for assigned global, project and resource calendars.
Financial Periods	View project's period performances
Filter	Filter the project's view based on selected criteria.
Auto filter	Filter data in the project view based on cell values.
Group	Group the projects in the view by specific criteria.
Sort	Arrange the projects in the table in the custom order in ascending or descending sort order.
Timescale	Adjust the timescale to reflect your planning period.
Customize Timescale	Select the date format when showing the project's primary or ordinal dates as well as labels for the ordinal dates.
Find	Find items in the current Table view.

Project table

Project data is given in multiple columns of the Project table. To add or remove columns in the Project Table click on the **Project Table** button.

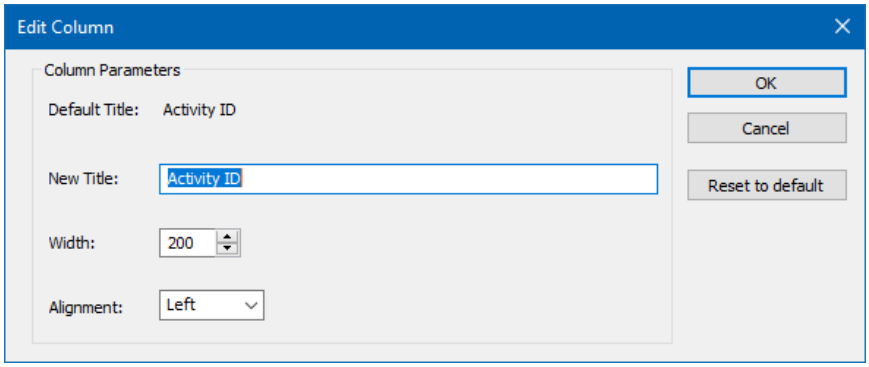
In the ***Customize columns*** dialog box, there are two columns, one containing all the available columns that you can view for the project and the ones selected to be displayed in the Project table.

From the ***Available columns*** list select the desired columns and **add** them to the right by clicking on the right arrow. To apply the changes, simply close the window.



You can **change the order** of columns in the table by drag and drop a column header.

Using the **Edit Column** functionality, the user can rename the existing columns in terms of adding a title that is different from the field's name and align it according to the specific need. The **auto-resize** functionality**,** every column will be resized according to the longest cell value eliminating the need for manually resizing.



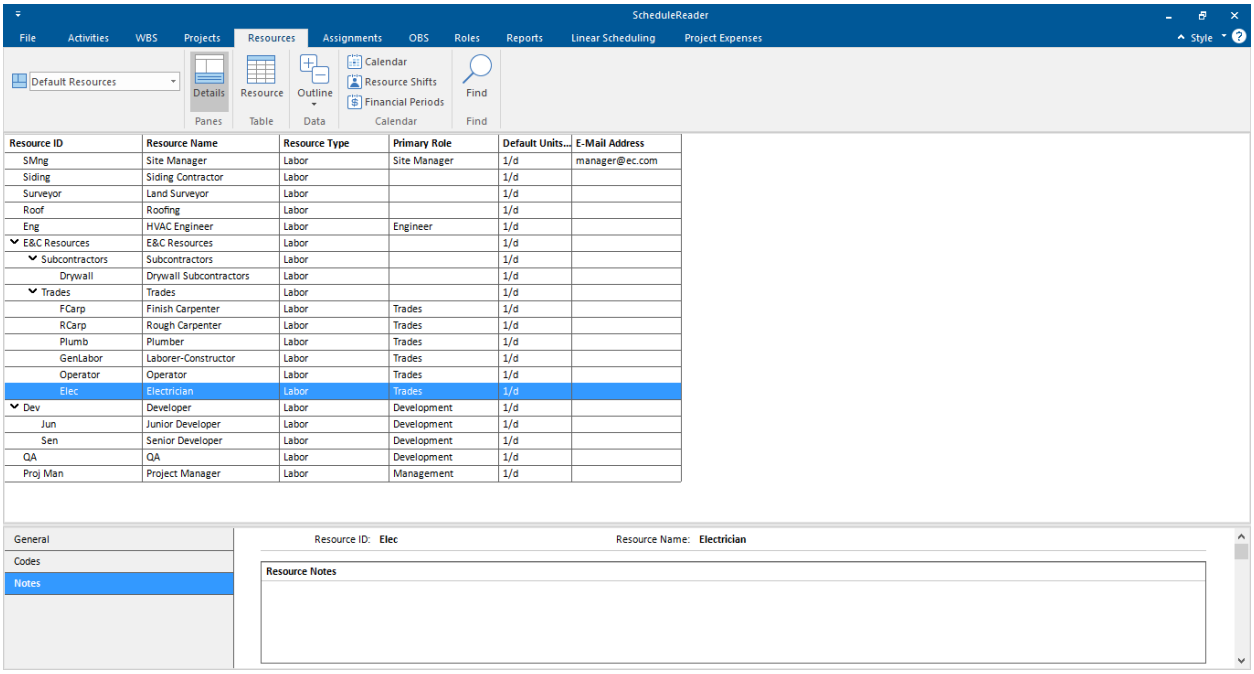
Project details

Enable **details** to be shown on the bottom of the project table. Select a project from table to view detailed information for it as presented in the following tabs:

General	General information for project ID, name, status and responsible manager.
Schedule Options	Settings that are used for scheduling the project plan.
Codes	Organize the projects in EPS in groups according to specific categories, for example, location and department.
User defined fields	View the project UDF assignments for the selected project

Resources view

The resource tab shows a list of all resources necessary to complete the projects included in your enterprise project structure. For each resource, you can view the availability limits, unit prices, and a calendar that defines their standard work time and non-worktime.



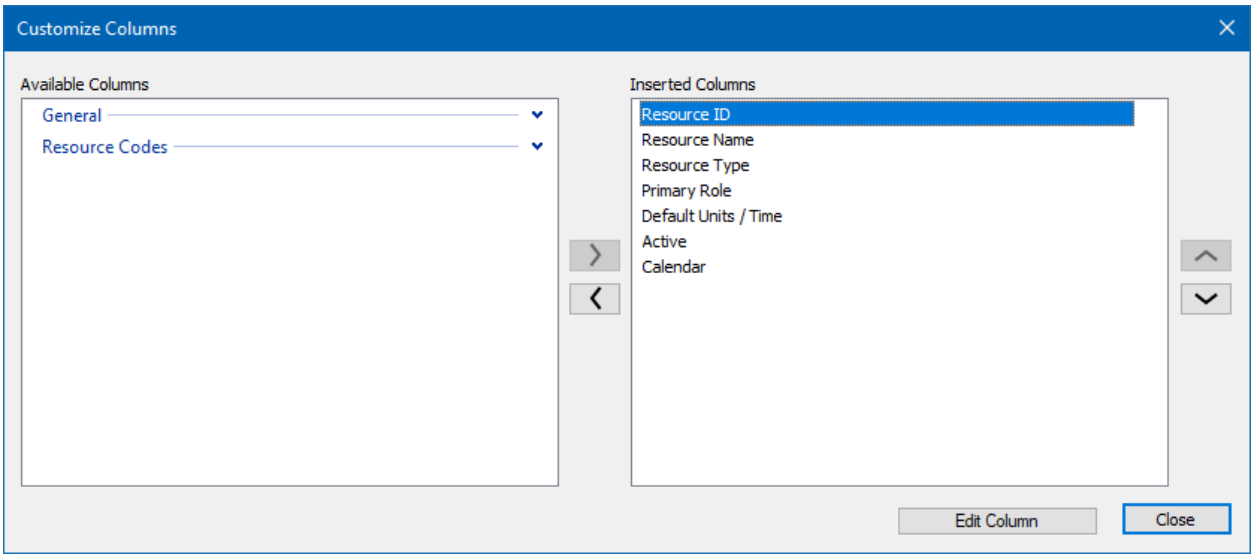
Resources tab

The following functionalities are placed in the Resource tab of the ribbon:

Layout	Choose how project data is displayed in the currently active view. Each layout shows different columns and applies different groping and sorting of data.
Details	Show on bottom project information details for the selected activity.
Resource table	Add/Remove columns for resources.
Expand All	Expands all collapsed items in a hierarchical table view.
Collapse All	Collapses all expanded items in a hierarchical table view.
Calendar	View details for assigned global, project and resource calendars.
Resource Shifts	View the shift calendars for resources.
Find	Find items in the current Table view.

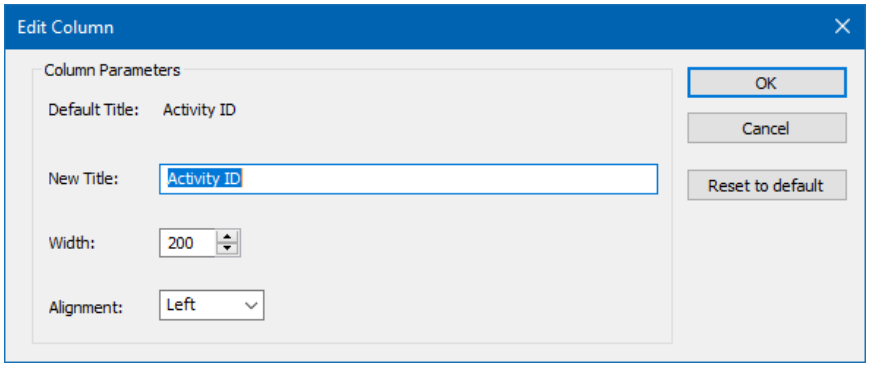
Resource table

Resource data is given in multiple columns of the resource table. To add or remove columns in the Resource table click on the **Resource Table** button. The **Customize Columns** dialog box will be opened. From the **Available columns** list select ones and **add** to the right. **Close** the window to apply changes.



You can **change the order** of columns in the table by drag and drop a column header.

Using the **Edit Column** functionality, the user can rename the existing columns in terms of adding a title that is different from the field's name and align it according to the specific need. The **auto-resize** functionality**,** every column will be resized according to the longest cell value eliminating the need for manually resizing.



Resource details view

Enable **details** to be shown on the bottom of the resource table. Select a resource from table to view detailed information given in the following tabs:

General	General information for resource ID and name.
Codes	Categorize resources using codes. View assigned resource codes and values.
Notes	Notes related to the selected resource.
User defined fields	View the resource UDF assignments for the selected resource

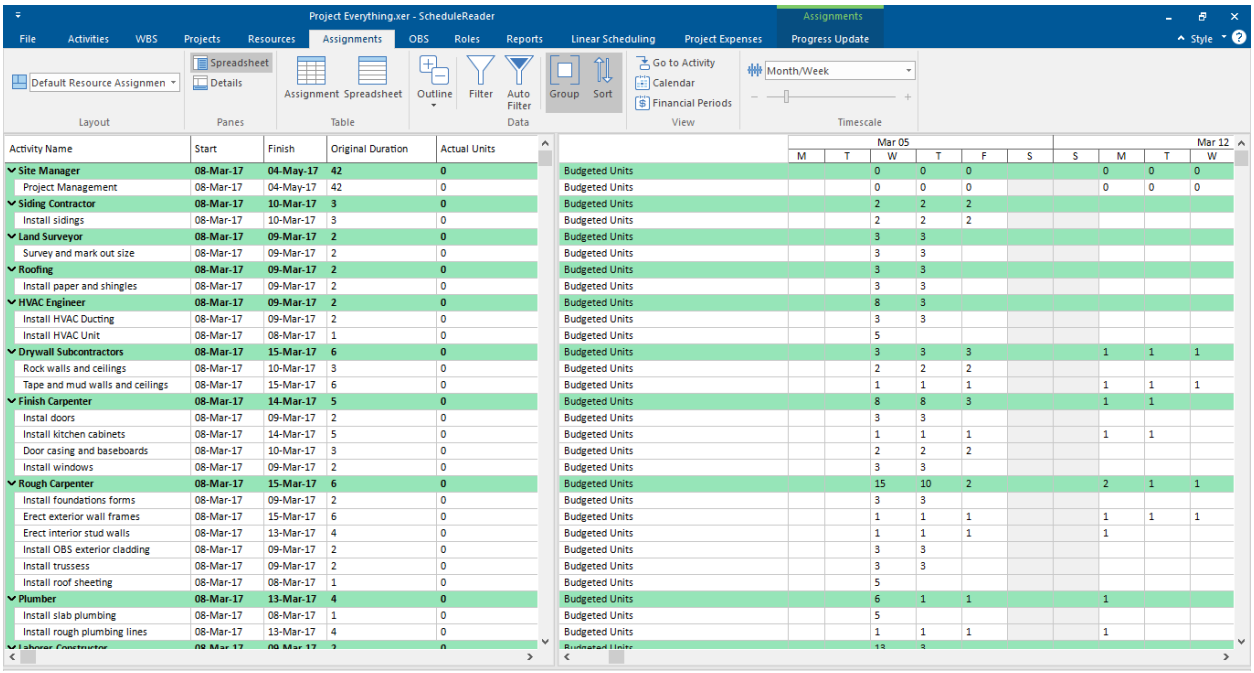
Assignments view

In Assignments view are displayed **resource allocations** across all imported projects. **Resource usage** and **costs** by default are distributed evenly during an activity. However, you can use curves to define any nonlinear distribution.

Note: Curves can be assigned only to activities with a duration type: **Fixed Duration and Units/Time** or **Fixed Duration & Units**.

In Spreadsheet view you can see the:

- Calculate timescale values depending on the assignment curve for **Time Interval Fields**.
- Calculate timescale values depending on the assignment curve for **Cumulative Fields.**
- Calculate timescale values for **manually** inserted values.



Assignment tab

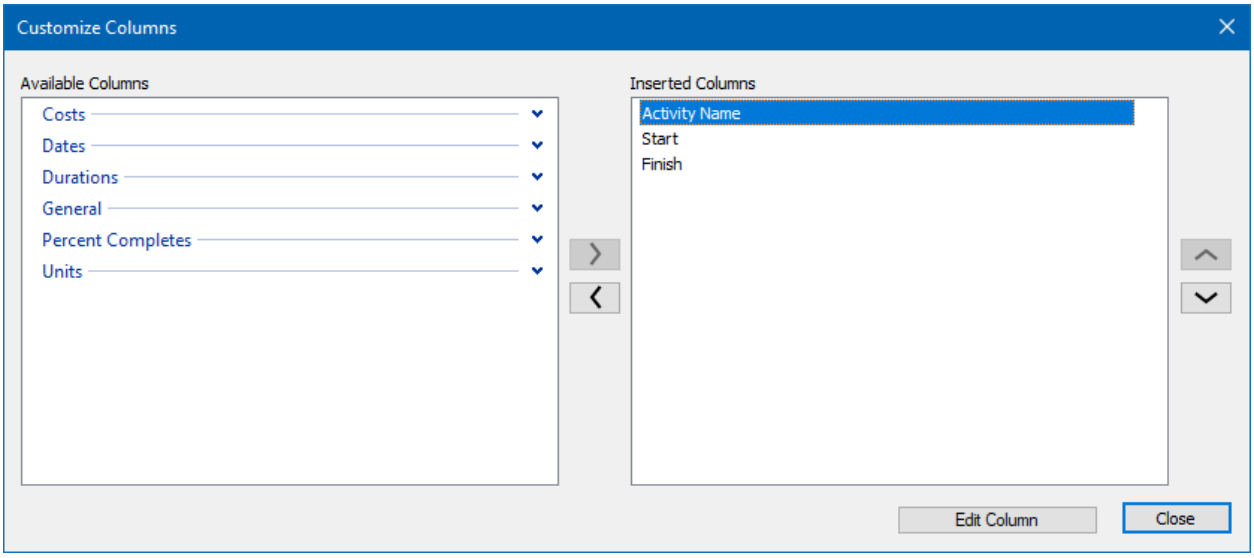
The following functionalities are placed in the Assignment tab of the ribbon:

Layout	Choose how assignment data is displayed in this view. Each layout shows different columns and applies different groping and sorting of data.
Details	Show on bottom details for selected resource/role.
Spreadsheet	Show resource quantity and cost in a spreadsheet.
Assignment table	Add/Remove columns for resource assignments.
Spreadsheet fields	Add/Remove fields in a spreadsheet.
Expand All	Expands all collapsed items in a hierarchical table view.
Collapse All	Collapses all expanded items in a hierarchical table view.
Filter	Filter the activity view based on selected criteria.

Auto filter	Filter data in the activity view based on cell values.
Group	Group the assignments in the view by specific criteria.
Sort	Arrange the assignments in the table in the custom order in ascending or descending sort order.
Go to Assignment	Navigate to the selected assignment in the Spreadsheet view.
Calendar	View details for assigned global, project and resource calendars.

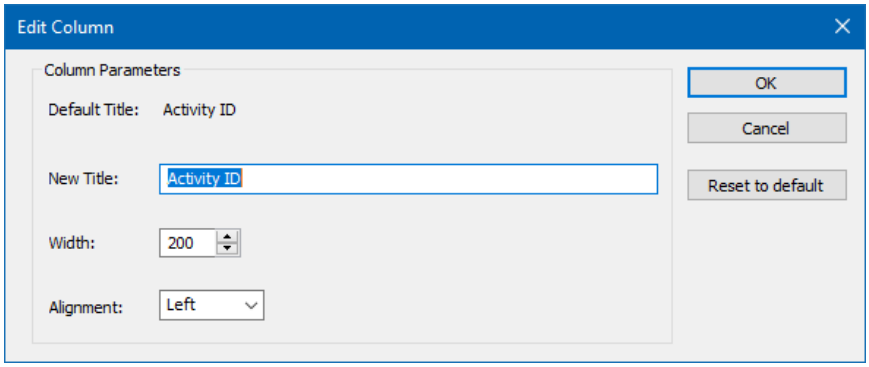
Assignment table

Resource assignment data is given in multiple columns of the assignment table. To add or remove columns in the Assignment table click on the **Assignment Table** button. The **Customize Columns** dialog box will be opened. From the **Available columns** list, select the desired ones and **add** them to the right. To apply the changes, simply close the window.



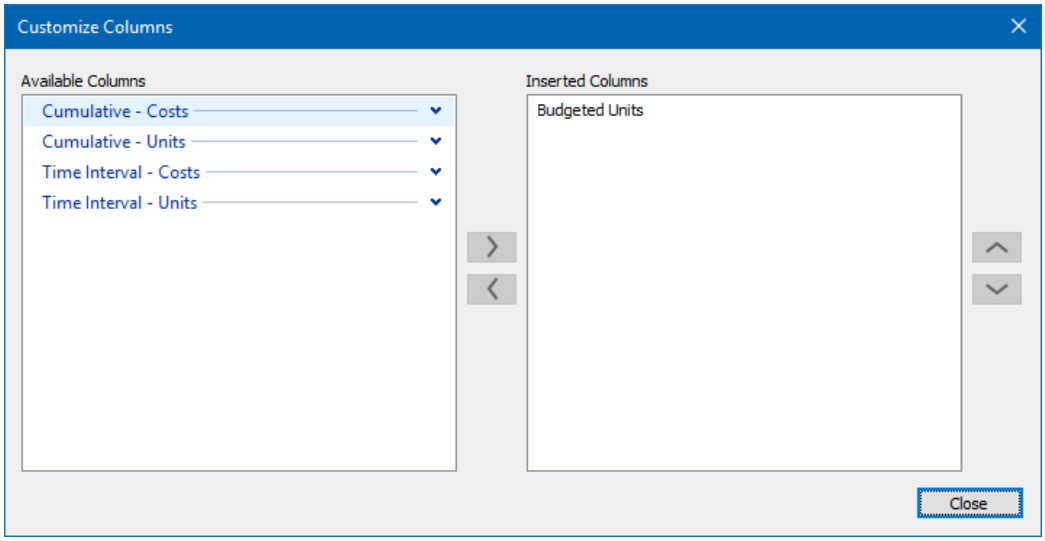
You can **change the order** of columns in the Assignments table by dragging and dropping a column header to the desired position.

Using the **Edit Column** functionality, the user can rename the existing columns in terms of adding a title that is different from the field's name and align it according to the specific need. The **auto-resize** functionality**,** every column will be resized according to the longest cell value eliminating the need for manually resizing.



Spreadsheet view

In the Spreadsheet view, you can see the resource cost and quantity information. From **Spreadsheet fields** you can choose which units to be presented.



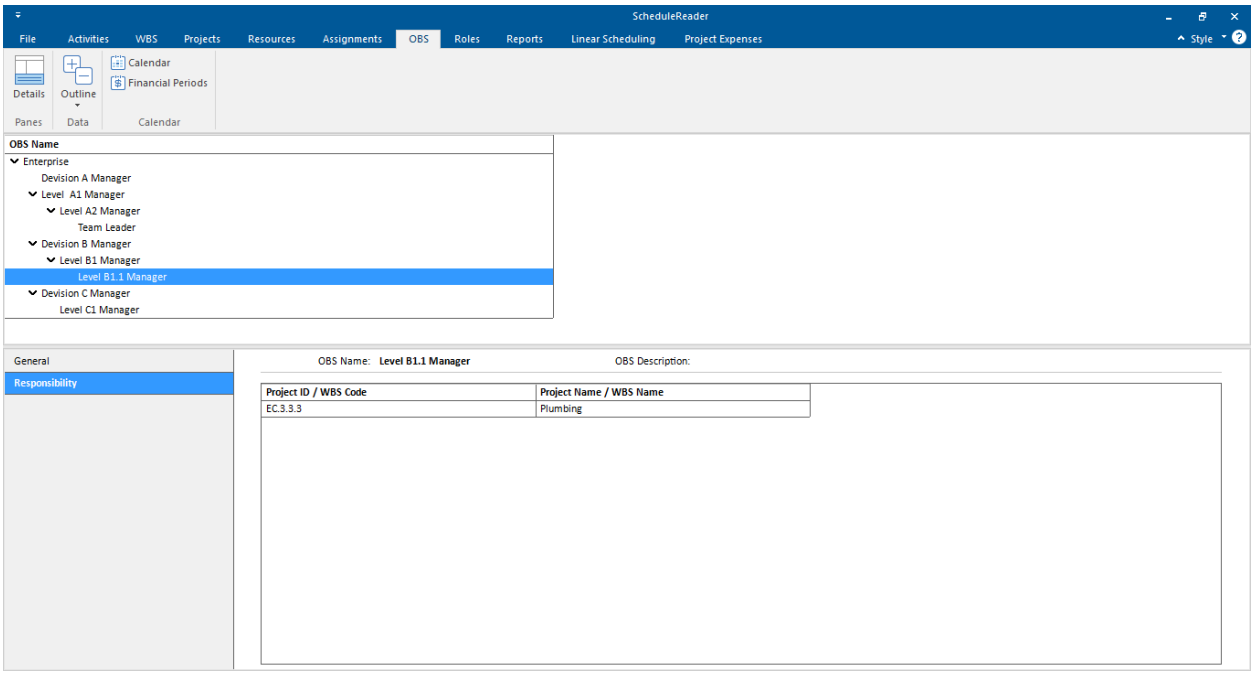
Assignment details view

Enable **details** to be shown on the bottom of the assignments table. Select an assignment from the table to view detailed information given in the following tabs:

General	General information about Activity name, Rate type and Price/Unit for selected resource/role assignment.
Planning	Display the expected, actual and remaining number of units for resource/role assignment.
User defined fields	View the assignment UDF assignments for the selected resource assignment.
Codes	View assigned assignment codes and values.

OBS view

The organizational breakdown structure (OBS) shows the management structure established in your organization. For each person in the OBS, you can find projects and WBS nodes for which he/she is responsible for.



OBS tab

The following functionalities are placed in the OBS tab of the ribbon:

Details	Show on bottom project information details for selected OBS element.
Expand All	Expands all collapsed items in a hierarchical table view.
Collapse All	Collapses all expanded items in a hierarchical table view.
Calendar	View details for assigned global, project and resource calendars.

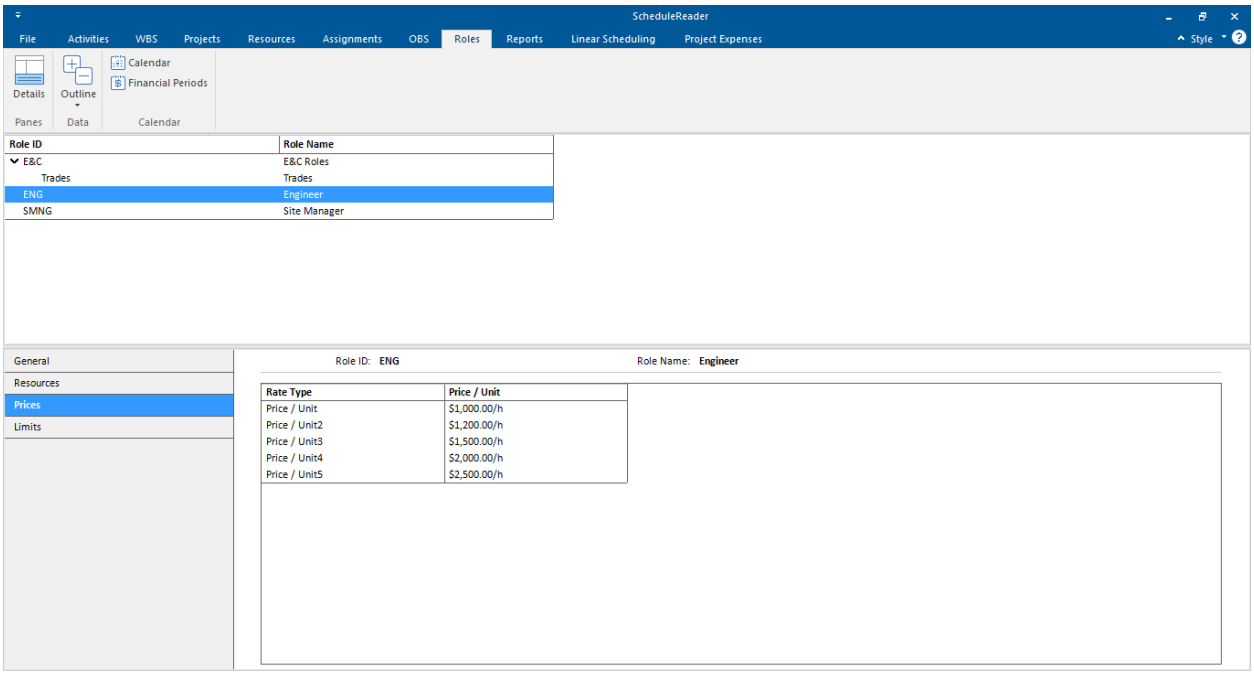
OBS details view

Enable **details** to be shown at the bottom of the screen. Select an element from table to view detailed information given in the following tabs:

General	OBS name and description.
Responsibility	List of all projects/WBS elements for which the OBS element is responsible.

Roles view

Roles are used to represent a specific set of knowledge, proficiency or skills personnel should possess to work on a project, such as a job title. Also, roles can be assigned to specific resources to further identify that resource's skills.



Roles tab

The following functionalities are placed in the Roles tab of the ribbon:

Details	Show on bottom project information details for the selected role.
Expand All	Expands all collapsed items in a hierarchical table view.
Collapse All	Collapses all expanded items in a hierarchical table view.
Calendar	View details for assigned global, project and resource calendars.

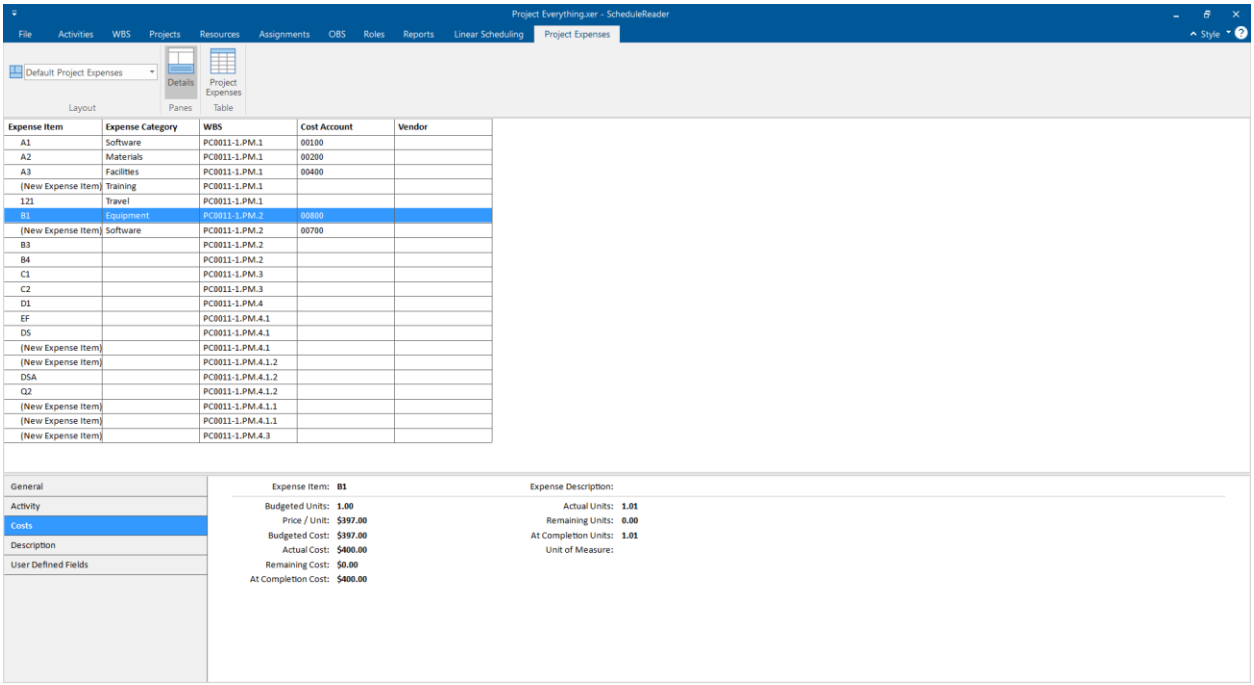
Roles details view

Enable **details** to be shown at the bottom of the screen. Select a role from table to view detailed information:

General	Role ID and Name.
Resources	List of resources assigned to the selected role.
Prices	Price/unit rates for each role.
Limits	Role availability over time.
Codes	View assigned role codes and values.

Project Expenses view

A simple explanation of the “expenses” would be that expenses are costs assigned to the activity, without global resource. Examples of expenses can be costs for working equipment, software, training, etc. Project Expenses view will give you a full overview of the assigned costs in the project plan.



Project Expenses tab

The following functionalities are placed in the Project Expenses tab of the ribbon:

Layouts	Choose how project data is displayed in the currently active view. Each layout shows different columns and applies different groping and sorting of data.
Details	Show on bottom expense information details for the selected activity.
Project Expenses table	Add/Remove columns for a project.

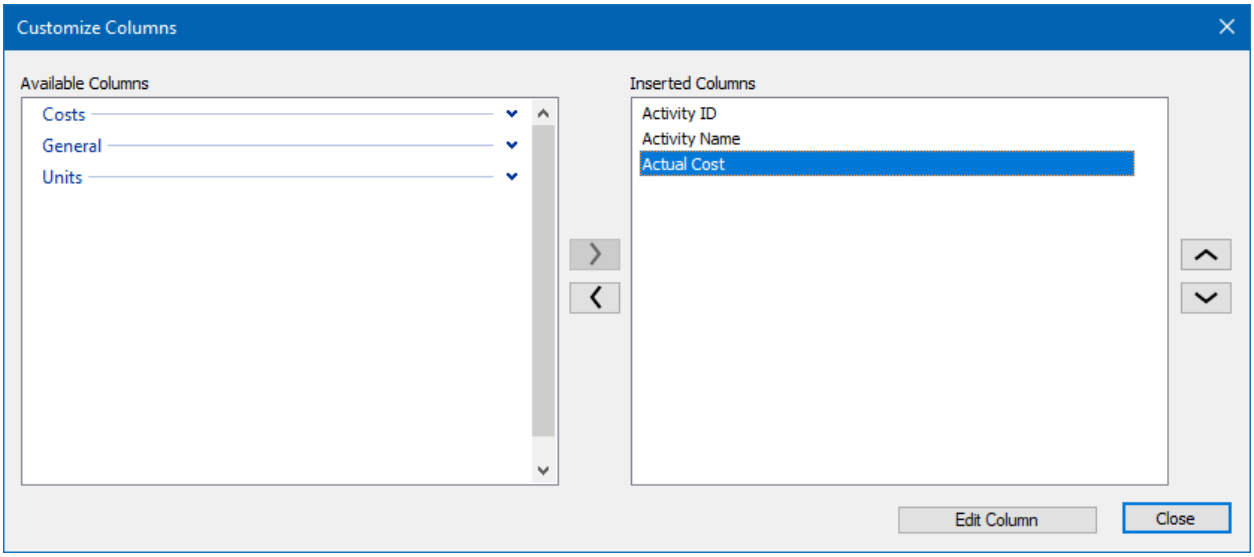
Project Expenses details view

Enable **details** to be shown on the bottom of the resource table. Select a resource from table to view detailed information given in the following tabs:

General	General information for the assigned expenses.
Activity	Present the item's activity assignment according to work breakdown structure (WBS) element, activity status, and activity start and finish dates.
Costs	View the cost amounts for the selected expense item, including Budgeted or Planned units, price/unit, budgeted or planned cost, actual cost, and remaining cost.
Description	View the description of the selected expense item.
User Defined Fields	View the Expenses UDF assignments for the selected expense

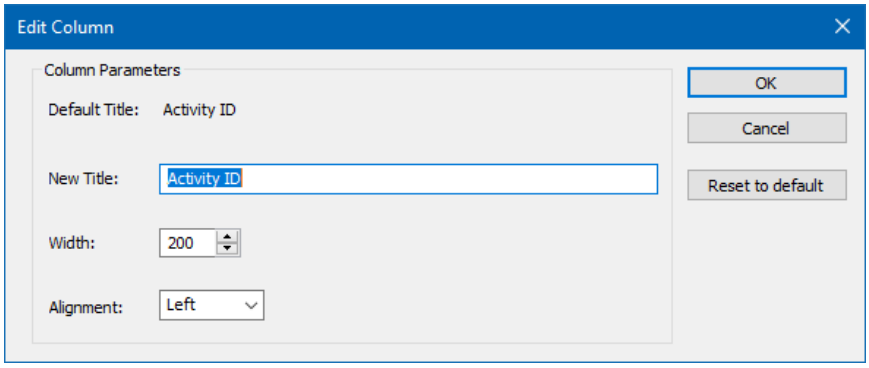
Expenses table

Activity expenses data is given in multiple columns of the Project Expenses table. To add or remove columns in the Activity table click on the **Project Expenses Table** button. The **Customize Columns** dialog box will be opened. From the **Available columns** list, select the desired Column and **add** to the right by clicking on the arrow. To apply the changes, simply close the window.



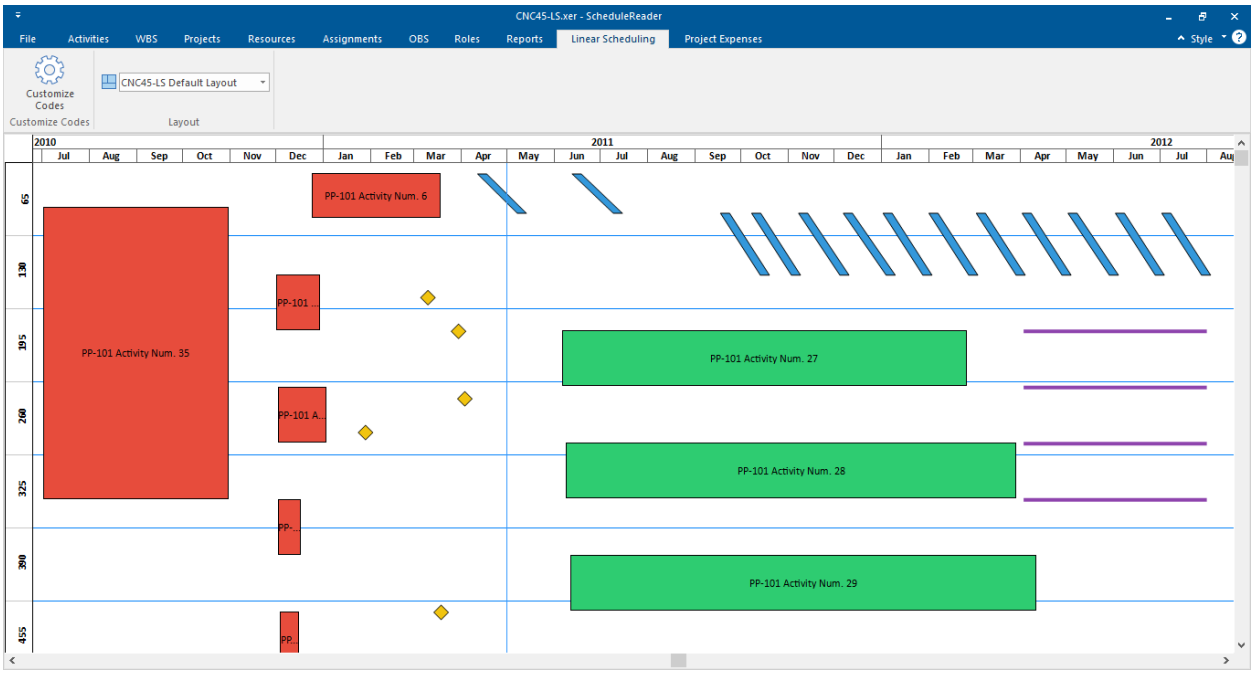
You can **change the order** of the columns in the Activity table, by dragging and dropping a column header to the desired position.

Using the **Edit Column** functionality, the user can rename the existing columns in terms of adding a title that is different from the field's name and align it according to the specific need. The **auto-resize** functionality**,** every column will be resized according to the longest cell value eliminating the need for manually resizing.



Linear Scheduling view

"Linear Scheduling" terminology is used in projects from the following industries: gas and oil pipelines, rails, bridges, tunnels, roads, high-rise buildings, transmission lines construction, etc. It allows users to see project elements in the time-location diagram.



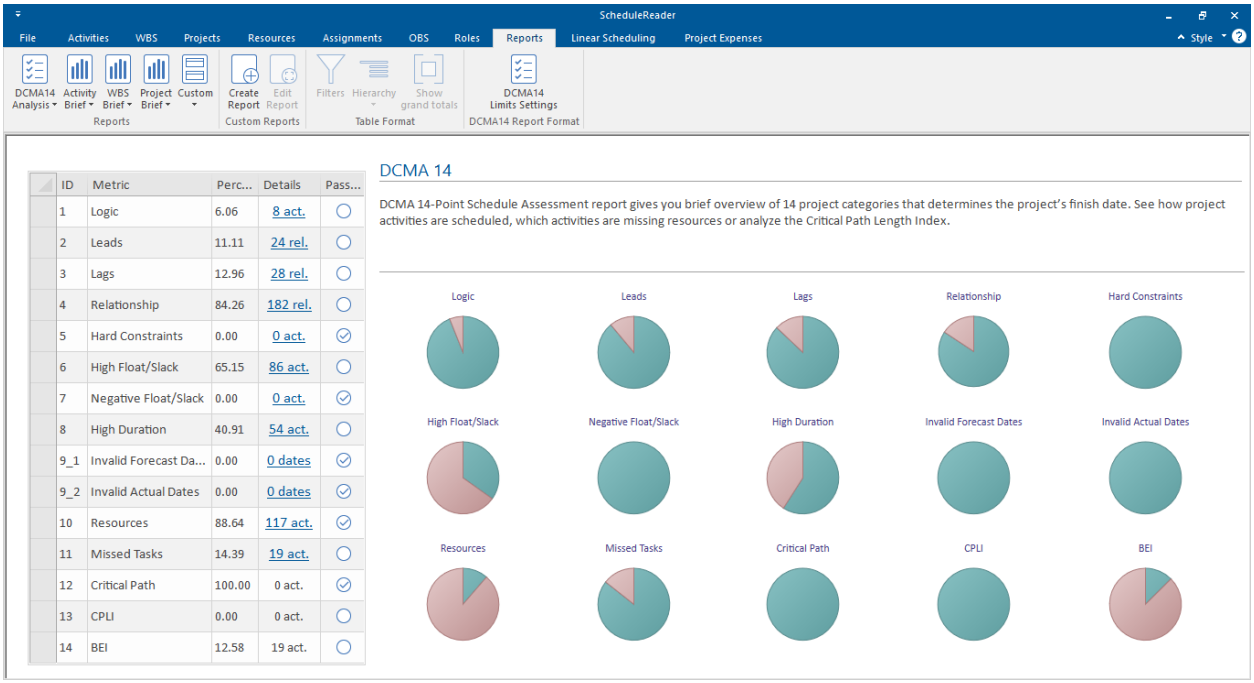
Linear Scheduling tab

The following functionalities are placed in the Linear Scheduling tab of the ribbon:

Customize Codes	Open the "Customize Liner Codes" dialog, containing information for the code types and colors that are used in the time-location chart.
Layout	Choose how project data is displayed in the currently active view. Each layout shows a different object on the chart.

Reports view

Graphical Reports gives information about various project parameters. This functionality is available only in the Pro version and in the trial. Users can work with two types of graphical reports: predefined and custom.



ID	Metric	Perc...	Details	Pass...
1	Logic	6.06	8 act.	
2	Leads	11.11	24 rel.	
3	Lags	12.96	28 rel.	
4	Relationship	84.26	182 rel.	
5	Hard Constraints	0.00	0 act.	✓
6	High Float/Slack	65.15	86 act.	
7	Negative Float/Slack	0.00	0 act.	✓
8	High Duration	40.91	54 act.	
9_1	Invalid Forecast Da...	0.00	0 dates	✓
9_2	Invalid Actual Dates	0.00	0 dates	✓
10	Resources	88.64	117 act.	✓
11	Missed Tasks	14.39	19 act.	
12	Critical Path	100.00	0 act.	✓
13	CPLI	0.00	0 act.	
14	BEI	12.58	19 act.	

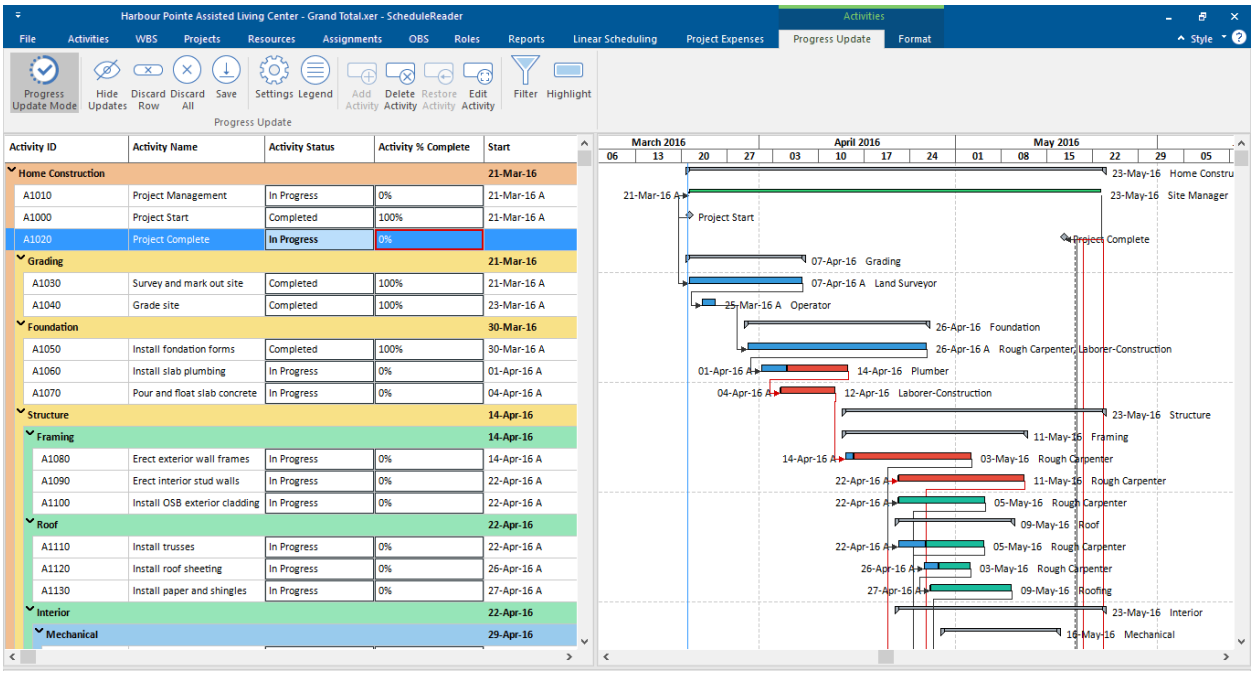
Reports tab

The following functionalities are placed in the Reports tab:

DCMA 14 Analysis	Graphical Reports that give an overview of the project schedule assessment. DCMA 14 Schedule Assessment report is located in this section.
Activity Brief	Graphical Reports that give an overview of the activity parameters, based on the information stored in the project plan.
WBS Brief	Graphical Reports that give an overview of the WBS parameters, based on the information stored in the project plan.
Project Brief	Graphical Reports that give an overview of the project parameters, based on the information stored in the project plan.
Custom	Personal reports that are created using the "Create Report" will be presented here, as reports list.
Create Report	Create new, personal graphical reports for analyzing specific project data from the project plan and share it with your team.
Edit Report	Make changes in the custom reports or modify the imported reports.
Filters	Apply filters in the reports.
Hierarchy	Presents the outline level in the reports output. Three types of the hierarchy are available: by WBS, by Primary Resource and Without Hierarchy.
Show Grand Totals	Presents the "Grand total" values for the project in the reports output.
DCMA 14 Limits Settings	Customize the limits criteria for the DCMA 14 Assessment report.

Progress Update

Progress Update ribbon contains features that allow users to insert a proposal for updates for particular activity or assignment.



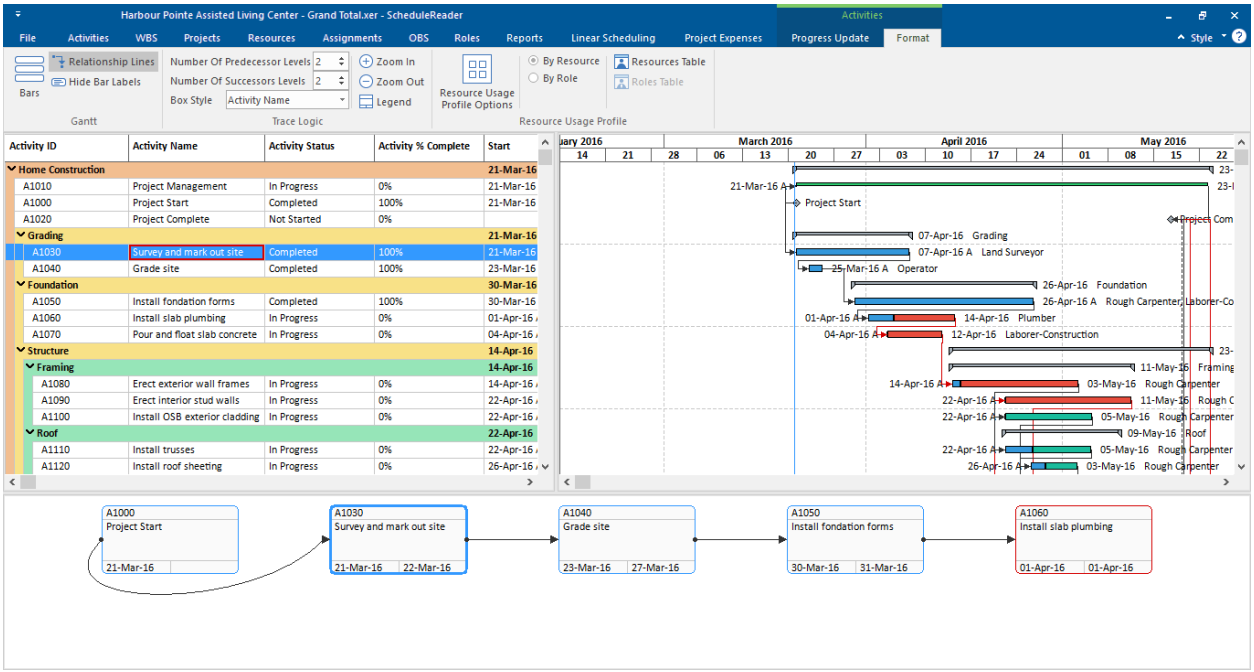
Progress update tab

The following functionalities are placed in the Progress Update tab of the ribbon:

Progress Update	Starting or finishing the collaboration mode.
Hide Updates	Show or hide the updated values in the cells.
Discard Row	Discard the inserted values for updates from the selected row in the table.
Discard All	Discard all inserted values for updates from the entire table.
Save	Saves updated values in a .xls file.
Settings	Setup the environment for the updating process, such as Start and Finish UDF and how the Excel file will be created.
Legend	Shows a description of the used colors in the updating process.
Add Activity	Inserting a new activity, after selecting the WBS under which the activity will be created.
Delete Activity	Mark's activity that should be deleted.
Restore Activity	Remove the “Delete” flag from the activity marked for deleting.
Edit Activity	Customize the parameters of the newly inserted activity.
Filter	Show only the updated activities in the project plan.
Highlight	Highlight the updated activities in the project plan.

FORMAT ACTIVITY VIEW

Any time when the Activity ribbon is selected, the Format ribbon will pop-up, as the last tab in the ScheduleReader GUI. It contains two sets of features, grouped into two groups: the “Gantt” group that allows customization of the Gantt chart in the Activity view and the “Trace Logic” group for customization of the Trace Logic view.



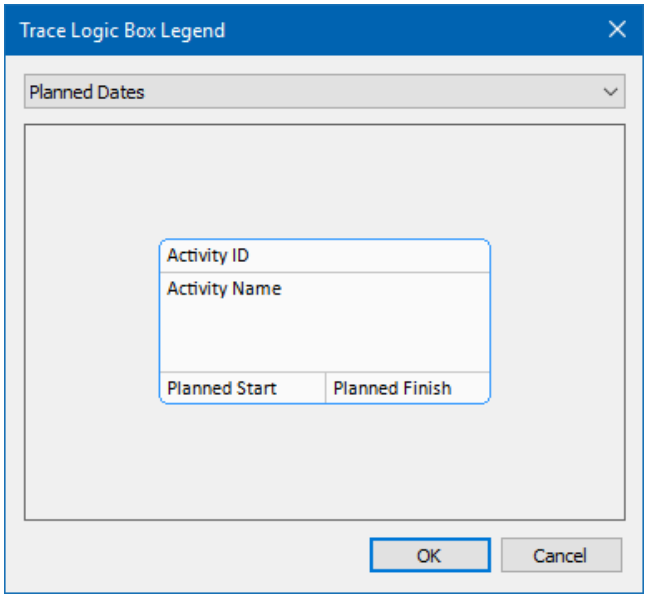
The following features are placed inside the Format ribbon:

Bars	Open the Bar dialog, containing information for the bar types and colors that are used in the view
Relationship lines	Show or hide the relationships between activities in the Gantt chart.
Hide Bar Labels	Show or hide the labels around the bars in the Gantt Chart.
Number of Predecessors level	Increase or decrease the predecessor’s number level that will be presented in the Trace Logic view.
Number of Successors level	Increase or decrease the successor’s number level that will be presented in the Trace Logic view.
Box Style	Change the shape of the activity box and the information level inside the box
Legend	Open new windows with a description of each project information that is placed inside the activity box.
Zoom In	Increase the zoom level of the Trace Logic view.
Zoom Out	Decrease the zoom level of the Trace Logic view.
Resource Usage Profile Option	Opens new dialog for Resource Usage Profile view/Stacked Histogram for customizing the view in term of viewing the S-curves, Cumulative lines, Legend, etc.
By Resource	Presenting the resource parameters (costs or units) in the diagram.
By Role	Presenting the role parameters (costs or units) in the diagram.

Resource Table	Customize the resource table in Resource usage Profile view/Stacked Histogram by adding or removing columns.
Roles Table	Customize the role table in Resource usage Profile view by/Stacked Histogram adding or removing columns.

Trace Logic Box Legend

Depending on the level of the analysis that is required, the information inside the activity boxes can be change. ScheduleReader contains six predefined Trace logic boxes, each of them containing different types of information.



The description of the available box types is presented in the table below:

Activity ID	The following information is placed inside the box: Activity ID
Activity Name	The following information is placed inside the box: Activity ID, Activity Name
Current Status	The following information is placed inside the box: Activity ID, Activity Name, Start, Finish, Units % Complete, Activity Status
Durations	The following information is placed inside the box: Activity ID, Activity Name, Start, Finish, Total Float, Original Duration, Remaining Duration
Planned Dates	The following information is placed inside the box: Activity ID, Activity Name, Planned Start, Planned Finish
Resource View	The following information is placed inside the box: Activity ID, Activity Name, Planned Start, Planned Finish, Resources

Resource Usage Profile

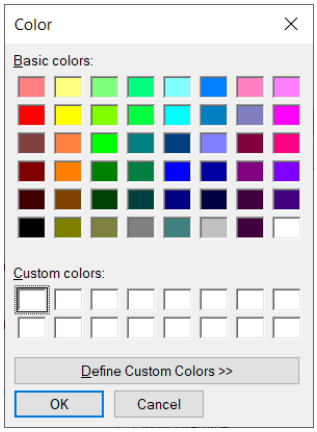
The customization of Resource Usage Profile view can be done using the features that are implemented in the Format ribbon. In order customization to be done quickly, the following features are implemented in the Resource Usage Profile group:

Resource Usage Profile options	Opens a dialog in which the user can select whether units or costs will be presented in Resource Usage Profile view, whether the data will be presented by Date or Cumulative, to change the bar's color or to show or hide additional data such as to show limit, overallocation or overtime.
By Resource	Presenting the resource parameters (costs or units) in the diagram.
By Role	Presenting the role parameters (costs or units) in the diagram.
Resource Table	Customize the resource table in Resource usage Profile view by adding or removing columns.
Role Table	Customize the role table in Resource usage Profile view by adding or removing columns.

Resource Usage Profile options

The core of the Resource Usage Profile view is the Options dialog. With the help of this dialog, the user can choose which category will be displayed on the graph (Units or Costs), to choose which subcategories will be displayed through the bars or curves graphic elements as well as additional data options that will of great help while analyzing the project data.

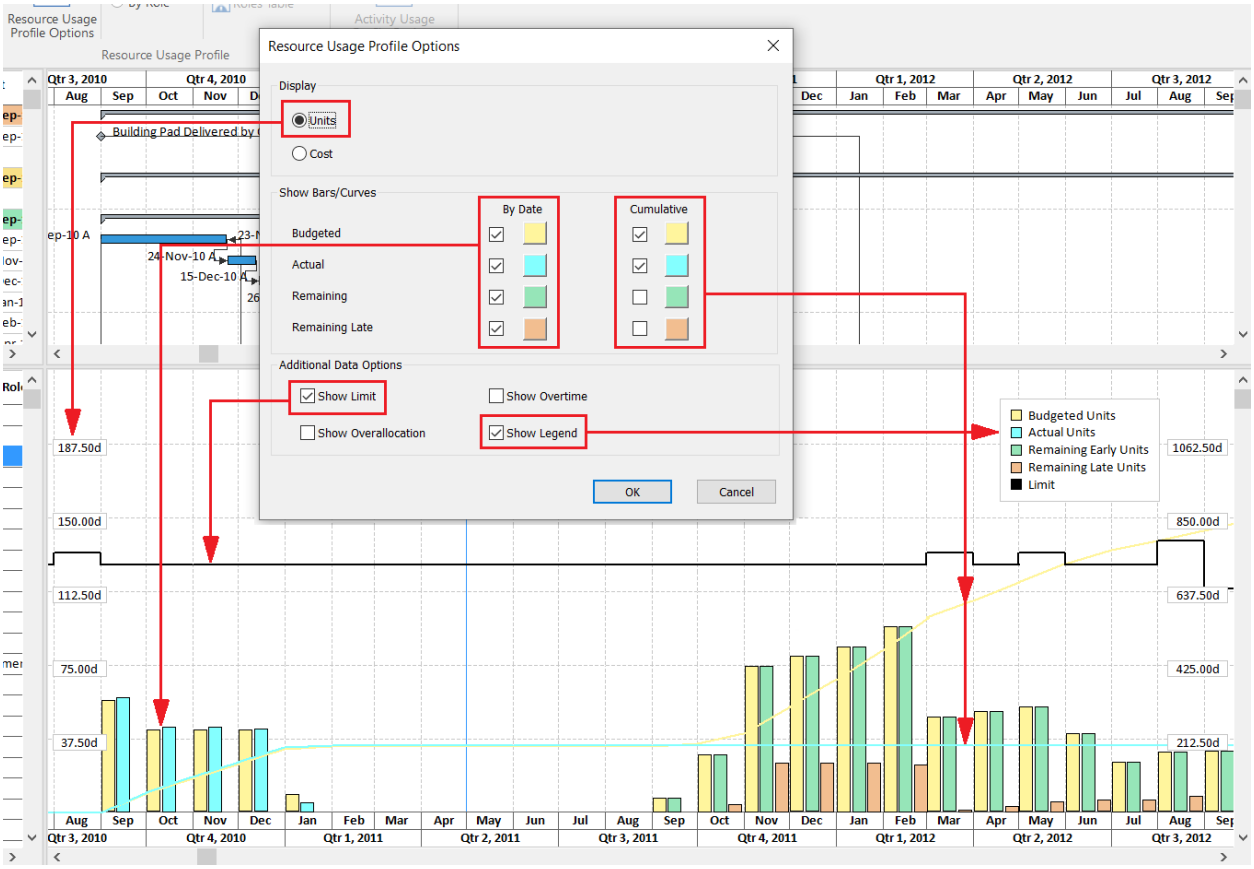
To change the bar's color, you have to click on the colored box  next to the feature's name. In the newly opened dialog, you can choose one from the default colors or to create your own, custom color.



Once the color is changed, it will be applied both on the bar and curve.

Several Importing remarks:

- Although all check-boxes from the "Bars/Curves" category can be selected, if the values don't exist in the project plan, they will not be drawn on the graph;
- Although the check-boxes for "Show Overallocation" and "Shoe Overtime" can be selected, if the values don't exist in the project plan, they will not be drawn on the graph;
- When the "Cost" category is selected, the "Show Limit" and "Show Overtime" check-boxes are disabled;



Activity Usage Profile

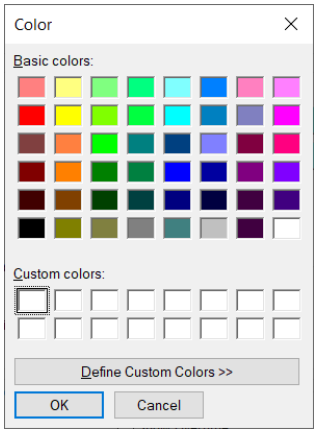
The customization of Activity Usage Profile view can be done using the feature that is implemented in the Format ribbon. In order customization to be done quickly, the following feature is implemented in the Activity Usage Profile group:

Activity Usage Profile options	Opens a dialog in which the user can select whether units or costs will be presented in Activity Usage Profile view, whether the data will be presented by Date or Cumulative or to change the bar's color.

Activity Usage Profile options

The core of the Activity Usage Profile view is the Options dialog. With the help of this dialog, the user can choose which category will be displayed on the graph (Units or Costs), to choose which subcategories will be displayed through the bars or curves graphic elements as well as additional data options that will of great help while analyzing the project data.

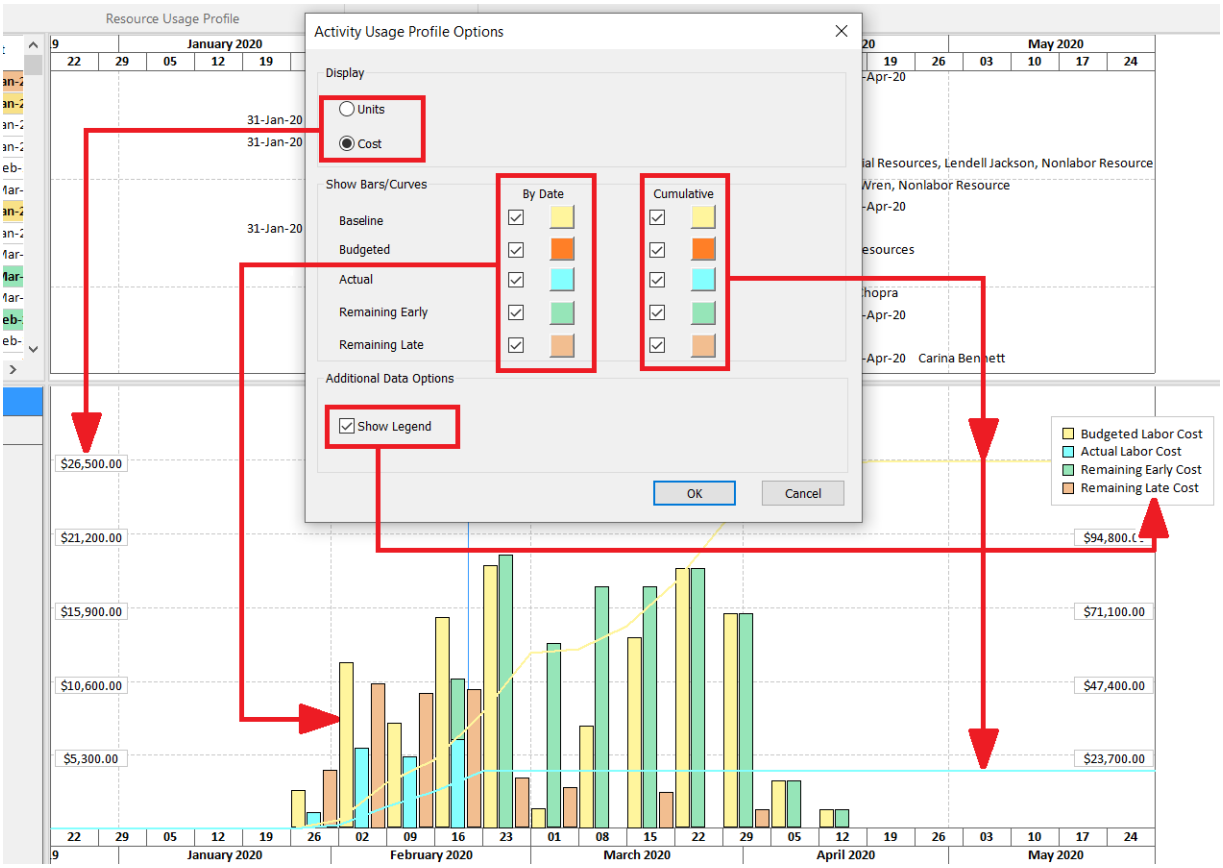
To change the bar's color, you have to click on the colored box next to the feature's name. In the newly opened dialog, you can choose one from the default colors or to create your own, custom color.



Once the color is changed, it will be applied both on the bar and curve.

Several Importing remarks:

- Although all check-boxes from the "Bars/Curves" category can be selected, if the values don't exist in the project plan, they will not be drawn on the graph;
- Although the check-boxes for "Show Overallocation" and "Shoe Overtime" can be selected, if the values don't exist in the project plan, they will not be drawn on the graph;



CUSTOM BAR STYLES AND LABELS

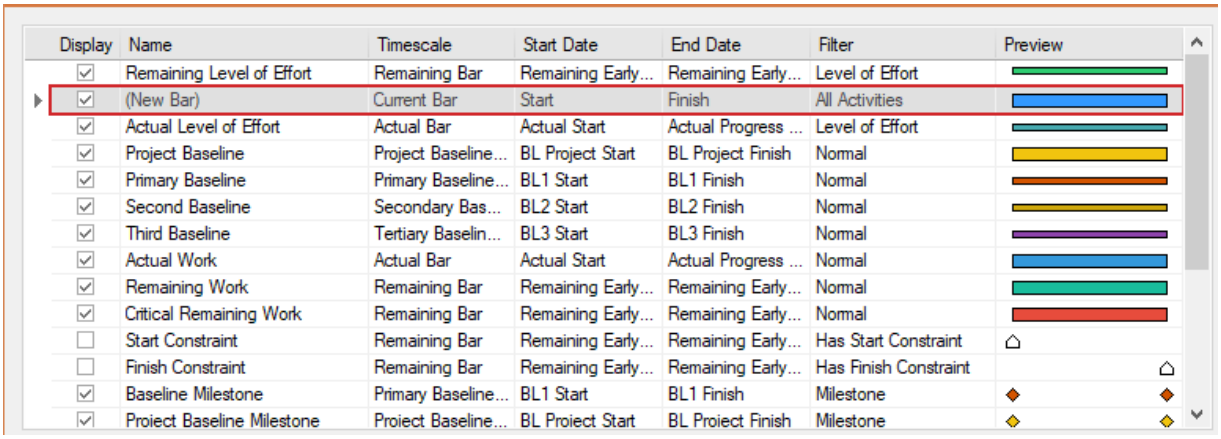
Bars are the basic elements of the Gantt Chart. They plot the start and finish dates of the activities based on the selected timescale period. Each bar has its own visual style that will help the user to recognize it from the other bars that are present in the Gantt Chart. ScheduleReader comes with a predefined set of bars for the Activity view but the user can add new bars or modify the existing ones according to its's needs.

Using the Bars dialog within the Activity View, you can create new bars, as part of the current layout, which will present project information that is not visible with the current layout's bar. Bars dialog is the central point where you can manage the outlook of the view: to show/hide which specific bars, to change the way they look in terms of choosing the custom color and shape for the bars or to customize the labels for the selected bar.

The Bars dialog consists of two main parts: functional and visual. Although they are placed in one dialog, the user can easily make distinctions between them.

The functional part of Bars dialog

With the functional part of the Bars dialog, the user is setting the parameters that will be displayed in the Gantt chart.



Display	Name	Timescale	Start Date	End Date	Filter	Preview
☑	Remaining Level of Effort	Remaining Bar	Remaining Early...	Remaining Early...	Level of Effort	
☑	(New Bar)	Current Bar	Start	Finish	All Activities	
☑	Actual Level of Effort	Actual Bar	Actual Start	Actual Progress ...	Level of Effort	
☑	Project Baseline	Project Baseline...	BL Project Start	BL Project Finish	Normal	
☑	Primary Baseline	Primary Baseline...	BL1 Start	BL1 Finish	Normal	
☑	Second Baseline	Secondary Bas...	BL2 Start	BL2 Finish	Normal	
☑	Third Baseline	Tertiary Baselin...	BL3 Start	BL3 Finish	Normal	
☑	Actual Work	Actual Bar	Actual Start	Actual Progress ...	Normal	
☑	Remaining Work	Remaining Bar	Remaining Early...	Remaining Early...	Normal	
☑	Critical Remaining Work	Remaining Bar	Remaining Early...	Remaining Early...	Normal	
☐	Start Constraint	Remaining Bar	Remaining Early...	Remaining Early...	Has Start Constraint	
☐	Finish Constraint	Remaining Bar	Remaining Early...	Remaining Early...	Has Finish Constraint	
☑	Baseline Milestone	Primary Baseline...	BL1 Start	BL1 Finish	Milestone	
☑	Project Baseline Milestone	Project Baseline...	BL Project Start	BL Project Finish	Milestone	

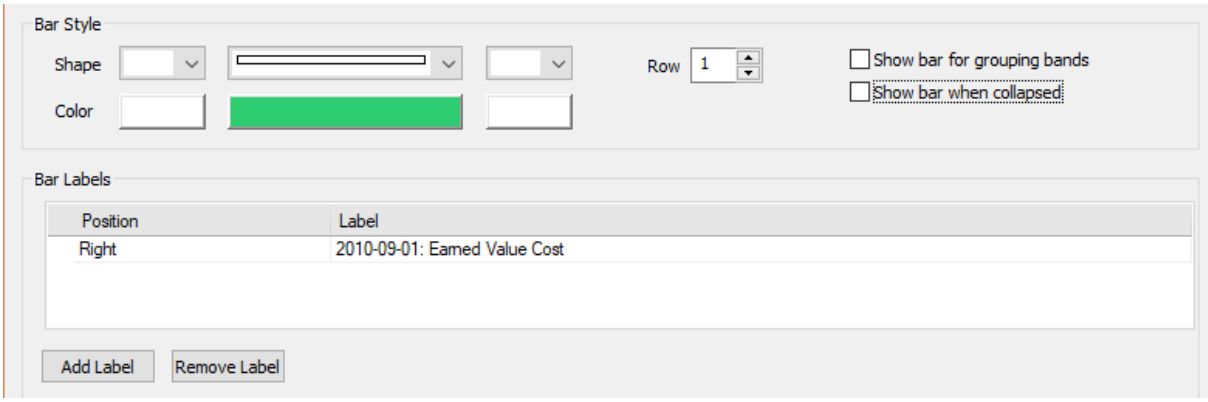
The following features are used for defining one bar:

Display	An indicator that shows whether some bar is visible in the Gantt Chart or not.
Name	An editable field where the user is inserting the name of the newly created bar or rename one of the existing bars.
Timescale	Time-period that is defined by different activity parameters. The following options are available for plotting: % Complete Bar, Actual Bar, Current Bar, Early Bar, Floating Bar, Late Bar, Neg. Float Bar, Performance % Complete Bar, Plan Bar, Primary Baseline Bar, Project Baseline Bar, Remaining Bar, Secondary Baseline Bar, Tertiary Baseline Bar, and User Dates.
Start Date	The starting point of the bar. This field is editable only if the *User Dates* option from Timescale's drop-down list is selected.
End Date	The finishing point of the bar. This field is editable only if the *User Dates* option from Timescale's drop-down list is selected.

Filter	Apply the filtering criteria for presenting the bars in the Gantt Chart.
Preview	The visual look of the bar.

The visual part of Bars dialog

With the functional part of the Bars dialog, the user is setting the parameters that will be displayed in the Gantt chart.



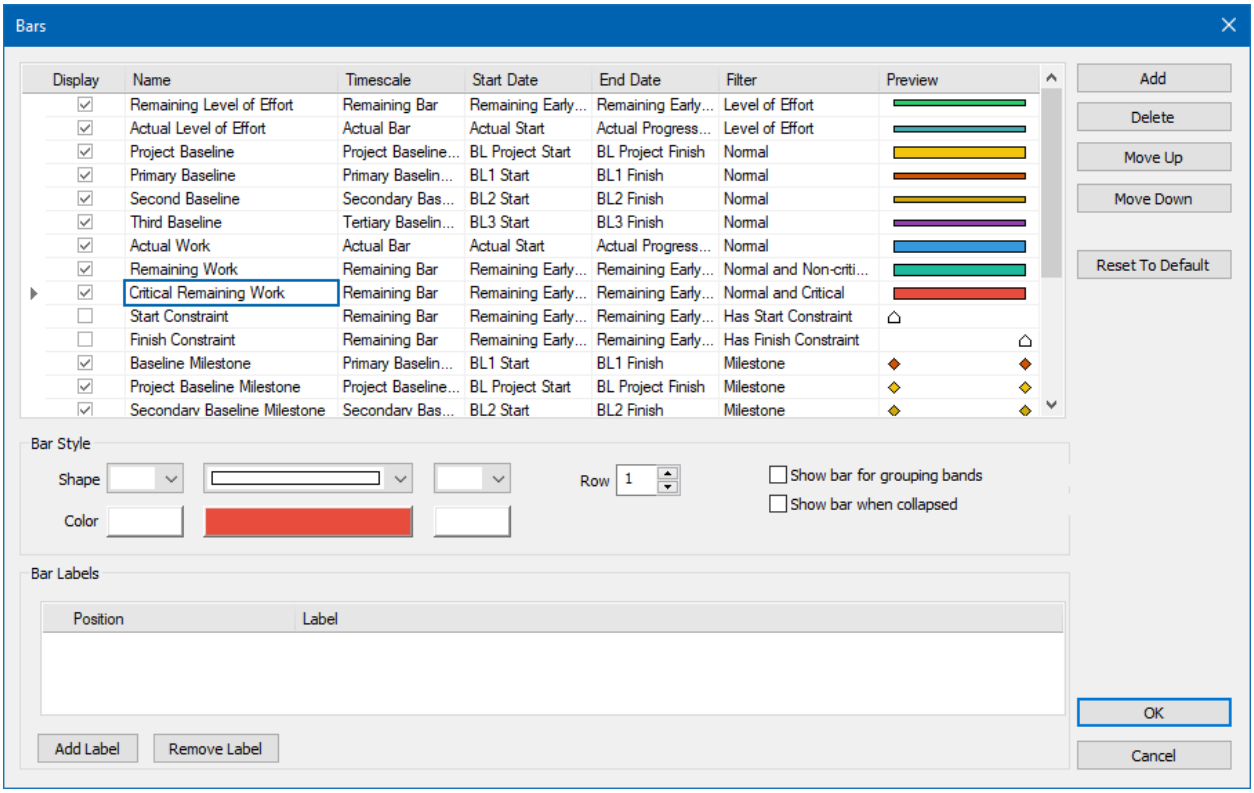
The following features are used for visual modifying one bar:

Start Shape	Select the starting shape of the bar. Starting shape is not mandatory for drawing ordinary activities. It is used when Start Milestone or Summary Activity is presented in the Gantt Chart.
Middle	Select the appropriate shape that will present the "body" of the activity. All types of activities have this shape part, except the milestones.
End Shape	Select the finishing shape of the bar. Finishing shape is not mandatory for drawing ordinary activities. It is used when Finish Milestone or Summary Activity is presented in the Gantt Chart.
Row	Each row in the Gantt chart is divided into 3 sub-rows, used for drawing bars. Selecting "1" means that the bar will be plotted in the top of the row, "2" means that the bar will be plotted in the middle of the row and "3" at the bottom of the row> Very useful feature when comparing baselines.
Color	Select the color for each part of the bar. All three parts can have its own color.
Show bar for grouping bands	Convert one bar category into the summary bar and plotted into the summary band. The normal bar for those particular activities will disappear from the chart because the Filter will be changed to Summary.
Show bar when collapsed	Select his feature if you want to present the select category of activities to the summary activity. This will allow having more detailed summary activity in those cases where most of the activities in the project plan are collapsed.
Bar Labels	Insert additional data to the selected bar category. You can add this data on various locations around the bar

Create a new Bar

Adding a new bar in the layout is simple and can be done in several steps:

1. Click on the *Add* button in the Bars dialog;
2. Insert *Name* for the newly created item;
3. In the *Timescale* select the time-period that will reflect strictly defined activity parameter;
4. In the *Filter* column select the filtering criteria that will be applied to the bar-style;
5. Click on the OK button.



Several important notes that must be outlined, when the user creates a new bar style:

- All parameters from the *Timescale's* drop-down list, except *User Dates*, have predefined values for Start Date and End Date, and they **cannot be changed**.
- If the user selects *User Dates* from the *Timescale's* drop-down list, he will be able to select the parameters that will define the *Start* and *End* dates of the bar. These dates are UDF (User-Defined Fields) and they are created in Primavera P6 by the project manager.
- Entire customization that has been done in the Bars dialog is saved in the layout that is applied and can be exported to other project participants or team members.
- Bars in the Bars dialog are organized into bar stack where the bars that are located higher in the stack have display advantage over the bars that are located lower in the stack. To change the order for presenting use the "Move Up" and "Move Down" buttons to change the location of the bars.

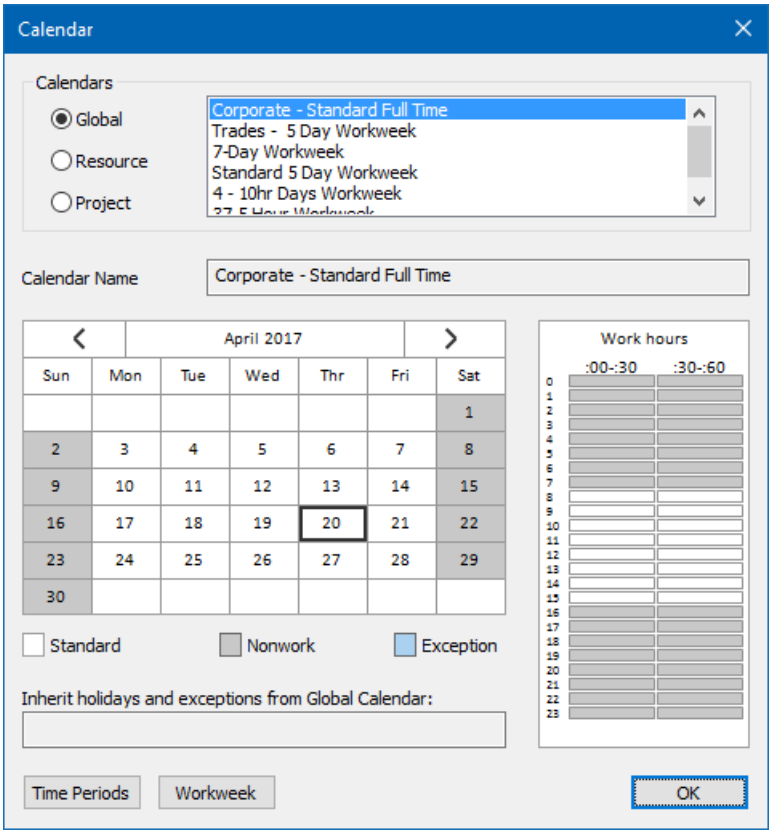
- Resetting to the initial bar styles can be done using the *Reset to Default* feature, where the entire customization that is done will be deleted permanently for all bar categories and the system will be brought to the original state.

CUSTOM FIELDS

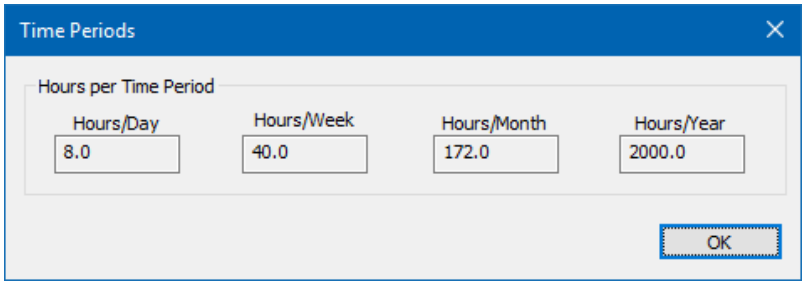
User-defined fields (UDF's) are used to add additional data for projects to assist your business processes. For example, you can have custom fields for sale order number, delivery dates and profits.

CALENDAR

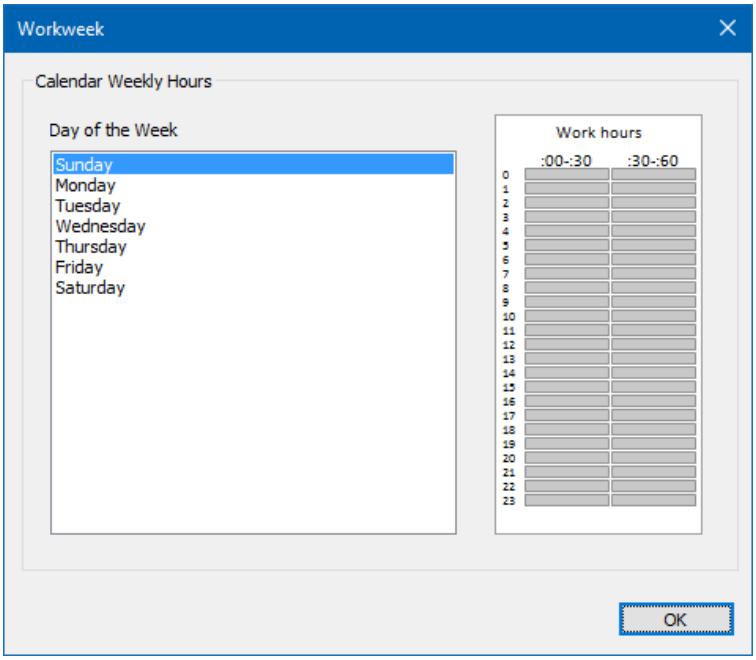
Different calendars can be assigned to each resource, activity or project in Primavera P6 to support different work patterns. Use the **Calendar dialog box**, to view the following:



- List of **calendars** used in one of the global, project or resource pools. The **global** calendar pool applies to all projects. The **project** calendar pool contains calendars for each project, while the **resource** calendar pool can be separated for each resource.
- **Available work hours** in each calendar day. Get informed about the start, end and break hours.
- National and company's **holidays**
- Project-specific **work** and **nonwork days** as well as resource days off.
- **Time Periods** displays the default hours per time period settings that are used as **conversion factors** when entering or displaying units in time increments other than hours.



- **Workweek** displays work days and hours during the week. For example, some workweek may start on Sunday and end on Thursday.



Whether an activity uses its assigned calendar or the calendar of an assigned resource depends on the activity type you specify (task-dependent versus resource-dependent).

TIMESCALE CUSTOMIZATION

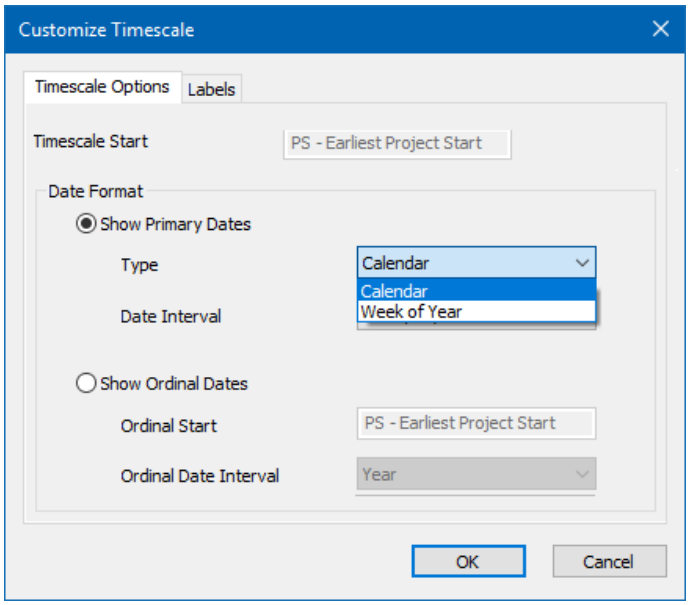
All views that contain Gantt Chart, such as Activity and Assignment views, have a timeline or timescale, that shows the order in which the activities in the project plan happened. The ScheduleReader users can customize the look of the timescale by changing the timescale format according to the specific project need. The modifications that are made in the timescale will be saved in the layout and can be shared with the team members. This process can be overviewed in the opposite direction: the user will be able to use complete prepared and customized timescale by importing the layout where the table's modifications are saved. In this way, the company's standards and procedures for managing projects will be fully satisfied.

ScheduleReader users can select which "Primary Dates" type will be applied in the timescale. The available options are:

- "Calendar" – the date intervals will be displayed according to the standard calendar that is used in the project plan;
- "Week of Year" – the date intervals will be displayed as numbers for each week of the year, sequentially, beginning from January.

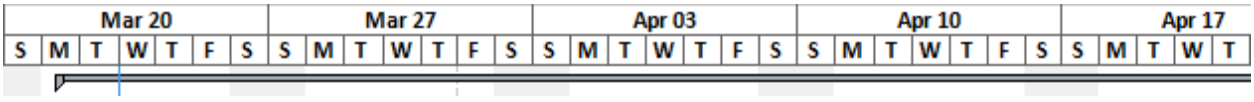
The steps to customize the timescale can be summarized as follows:

1. In the Timescale group, in Activity ribbon, click on the Customize Timescale.
2. In the newly open dialog, in the "Timescale Options" tab, select the date format.
3. In the Labels tab, define the label you want for displaying the time unit.

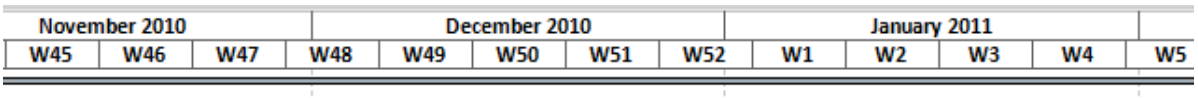


User can choose to change the date interval in the timescale to view different activity information or to get quality and quantitative information about the project's schedule:

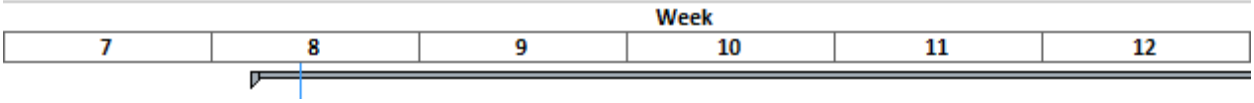
- Show Primary dates ("Calendar" Type) - Changing the date interval in the timescale, the user will be able to view different activity information.



- Show Primary dates ("Week of Year" Type) – Having the weeks in the timescale, will allow the user to use the "week" as a unit for describing the activity's property.



- Show Ordinal dates - Presenting ordinal dates in the timescale will allow the user to get quality and quantitative information about the project's schedule.

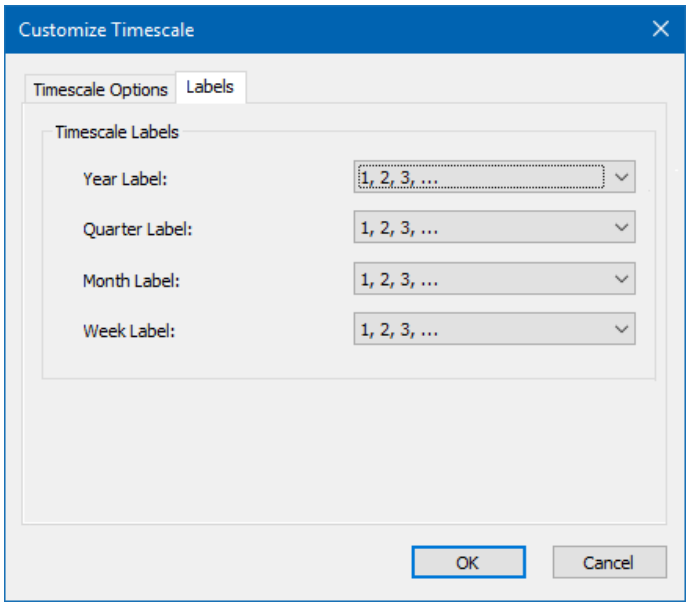


Modify timescale labels

When the “Ordinal Dates” format is selected for the project’s timescale, the user can select the label for the time units.

To change the labels for the ordinal dates in the timescale, perform the following steps:

1. Click on the Labels tab.
2. Select the appropriate label for the corresponding date interval.



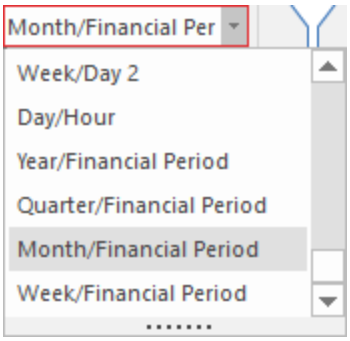
PRESENT FINANCIAL PERIODS

“Financial periods” functionality will help project managers, team leads and other project participants to have a complete overview of project performance for a certain period of time. In order to have these financial periods available for viewing in ScheduleReader, project scheduler must create them in Oracle P6 and the values to be saved using the “Store Period Performance”.

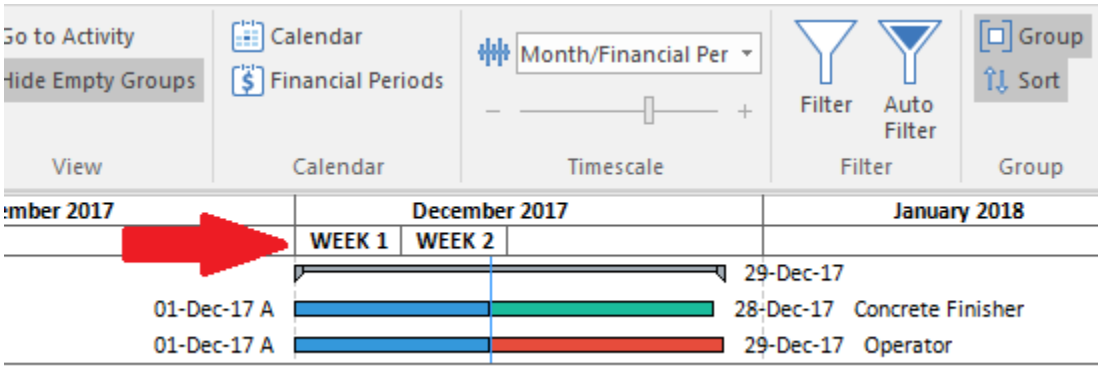
Once the necessary operations are done in Oracle P6, ScheduleReader users can see the project performance in the predefined period in order to make resource allocation or unit adjustments, if necessary.

How to view these parameters in ScheduleReader? Let’s have a simple example:

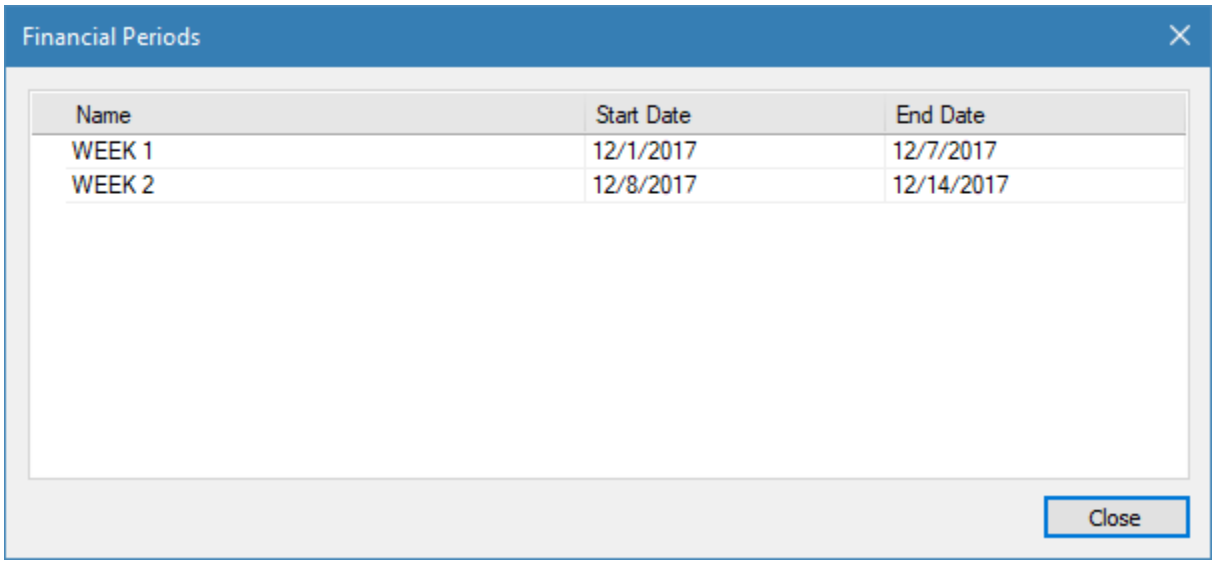
7. Open the XER file that contains financial periods.
8. To view the financial periods in the timescale, in the “Timescale” drop-down menu from the “Activity” ribbon, select one of the available options that are most appropriate for your work. In our case, we will select “**Month/Financial Period**”.



9. After performing this action, the project timescale will transform as the timescale presented in the image below.

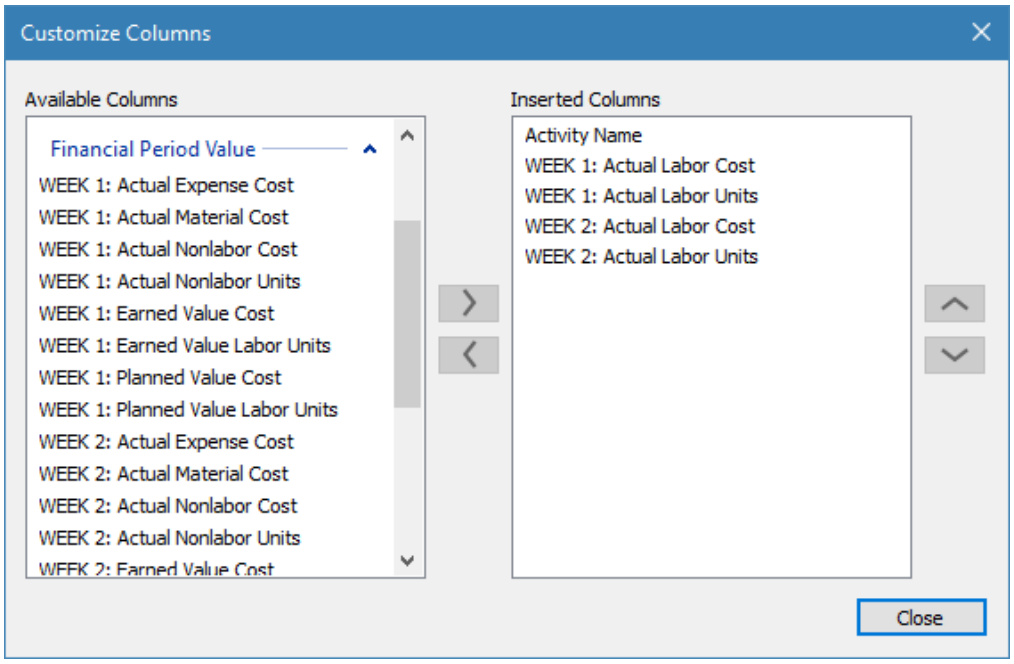


10. To view the financial periods that the project scheduler had created in Oracle P6, along with the starting and finishing dates, select the "**Financial Periods**" feature, located in the "Calendar" group, within "Activities" ribbon.



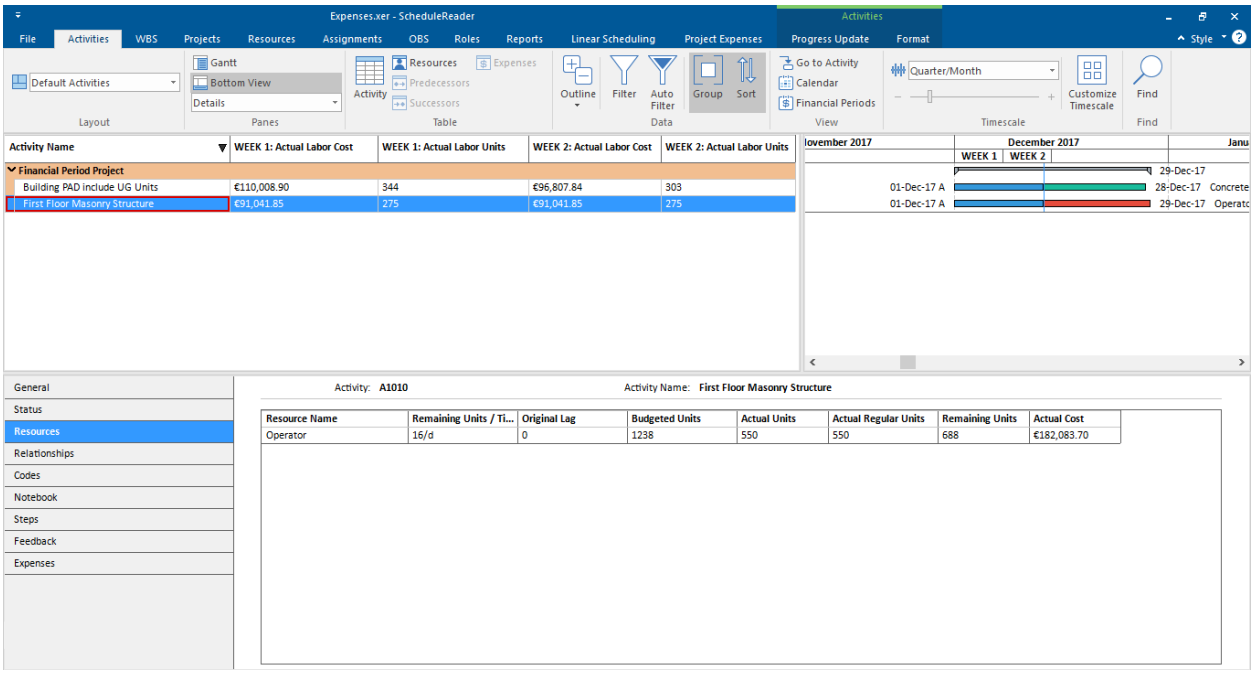
11. To view the values for the project's performance over a specific period, you need to insert the columns that contain the needed values. Open the "Activity Table" and from the "Financial

Period Value" menu select the values for the specific period. For every specified period, the following values can be presented: Actual Expenses Cost, Actual Labor Cost, Actual Labor Units, Actual Material Cost, Actual Nonlabor Cost, Actual Nonlabor Units, Earned Value Cost, Earned Value Labor Units, Planned Value Cost and Planned Value Labor Units.



Note: To view these values in ScheduleReader, project scheduler must save them in Oracle P6 using the "Store Period Performance" feature.

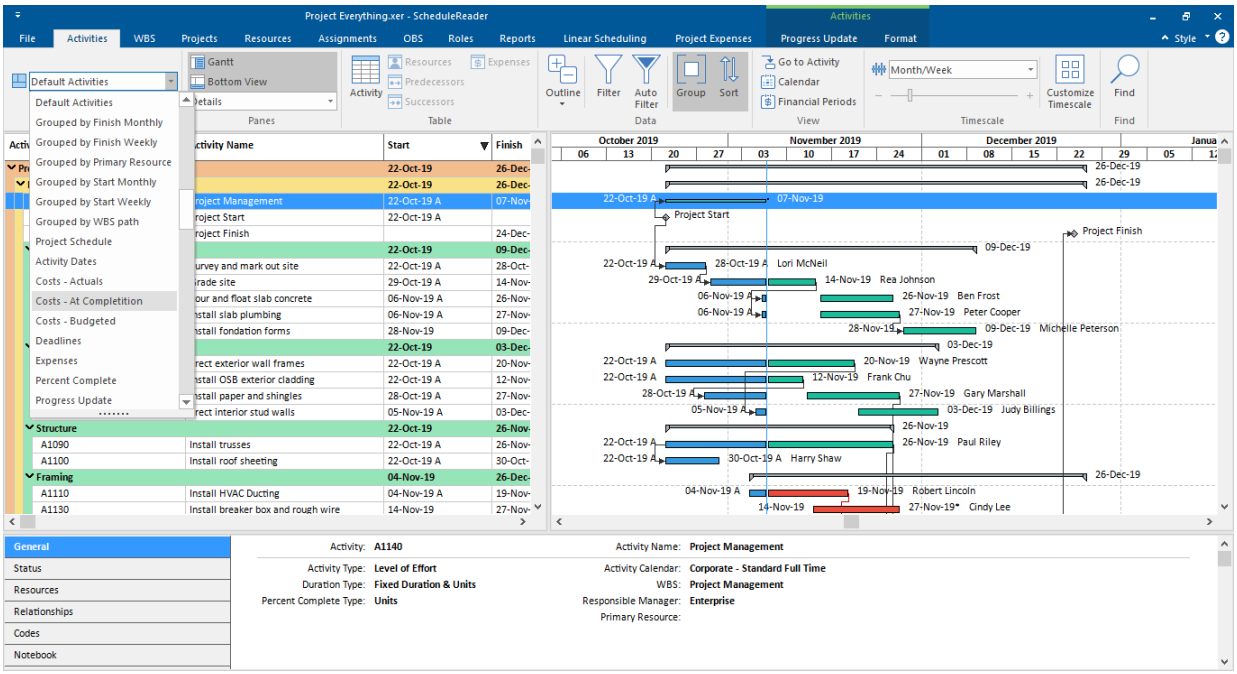
12. Finally, the "Financial Periods" layout is presented in the image below.



GROUP, SORT AND SUMMARIZE DATA

Introduction to grouping

Layouts define which **columns** to be shown in a given table, how project data is **grouped and sort**. Use the standard layouts for activity, WBS, project or resource table to display data in one of the predefined formats. For example, in the Activity table, you can choose to display data by Activity Status where activities are grouped by their status (completed or in progress) in ascending order of their start date. By default, the Activity ID, name, start and finish dates are shown in the table.



There are different layouts that can be applied in the activity, project, WBS or resource table. You can further organize your layout by using sorting to arrange the order of items. Click on the column header to sort data within a group by ascending or descending order.

When you group a layout by a data item, you can easily roll up activity data to calculate group totals and simplify the data presentation. From Ribbon, use the **Expand All** or **Collapse All**, or click the plus (+) or minus (-) symbols to the left of any grouping band to expand or collapse information.

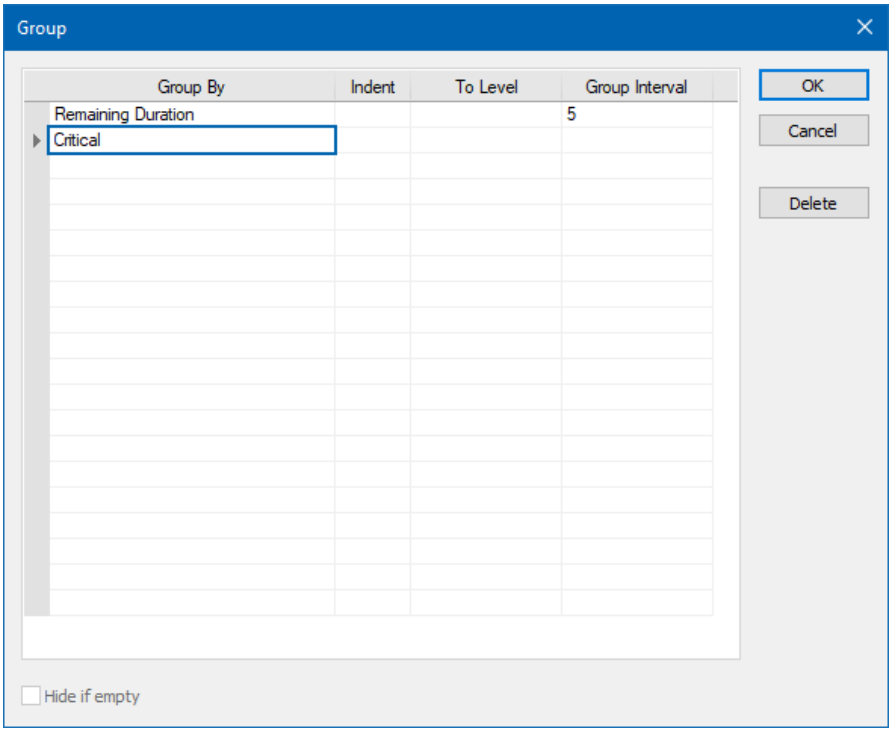
Create custom group in Activity view

Now you can create your own custom, user-defined groups, where you can view the activities grouped in a certain manner, whether that be an activity status, remaining duration, etc. You can define not only one group condition but specify multiple grouping criteria.

If you want to group activities by several grouping criteria, you have to do the following:

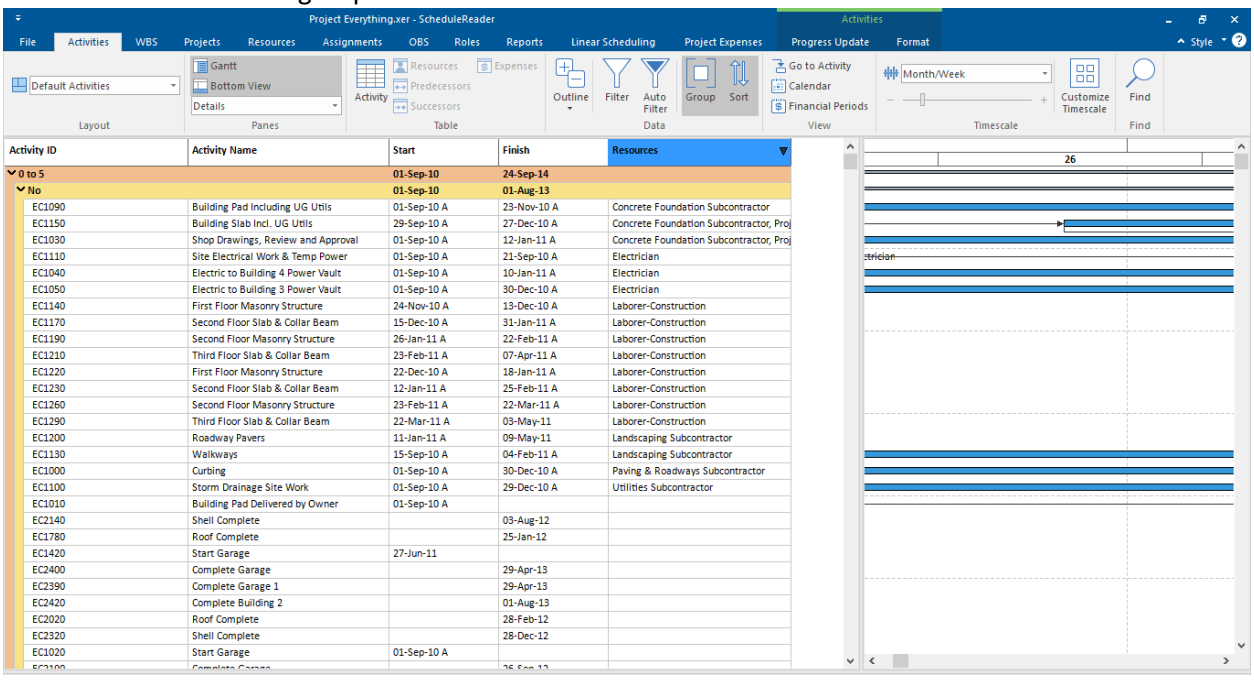
1. Open the **Activities** view, by clicking on the **Activities** tab.
2. Click on the **Group** option in the ribbon.

3. Choose the **Group By** criteria from the dropdown list.
4. Enter additional Interval and Indent Level Values for the grouping criteria.
5. Click **OK**.



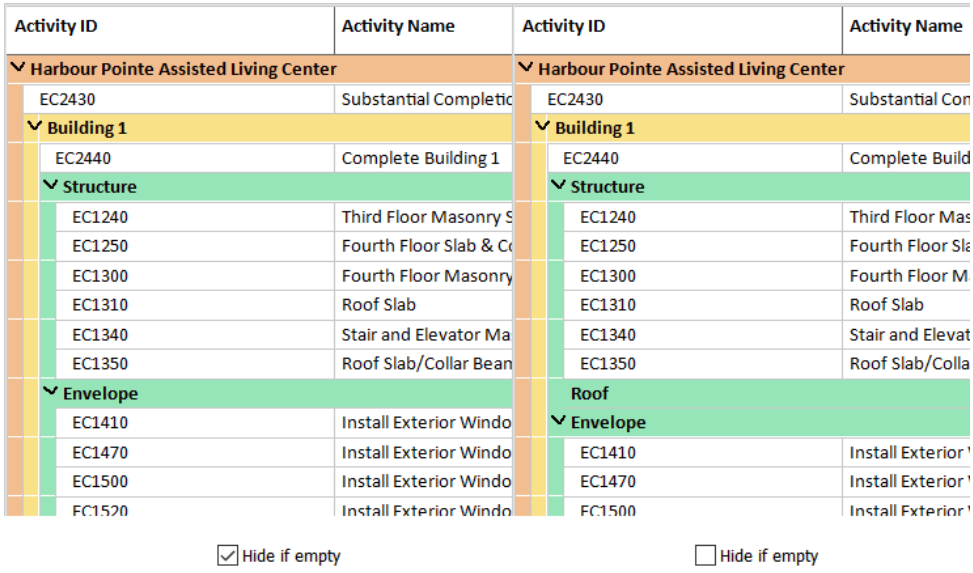
In the example above, you can see that this activity grouping is made with two conditions (criteria), by **Remaining Duration** and which of the activities with the given remaining duration are **Critical**.

This is how the different groups are visualized in the Activities table.



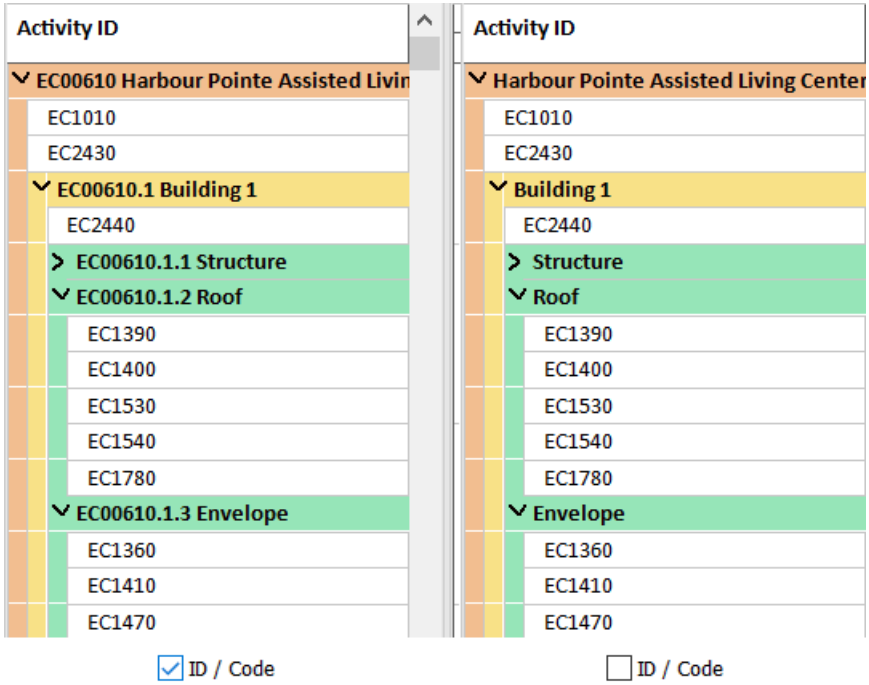
Hide if Empty

The “Hide if Empty” check-box is used to show or hide empty group title bands in the view. This mean that after grouping the Activity view according specific parameters, you have the opportunity to choose whether the group bands that don’t have any activities will be displayed or hide in the view.



Show ID/Code

The “ID/Code” functionality is used to format the display of the band title. Using the implemented functionality within the “Group” dialog, you can choose to display the ID or Code value on the grouping band.

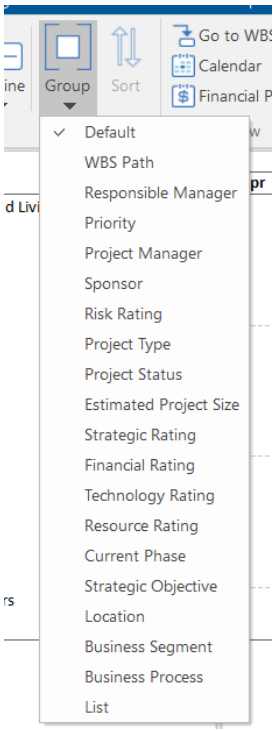


Create custom group in WBS view

The WBS view contains predefined groups that can be used for reaarange the WBS in the project plan.

If you want to group the WBS in the project plan, you have to do the following:

1. Open the **WBS** view, by clicking on the **WBS** tab.
2. Click on the **Group** option in the ribbon.
3. Choose one of the available grouping criteria from the dropdown list.

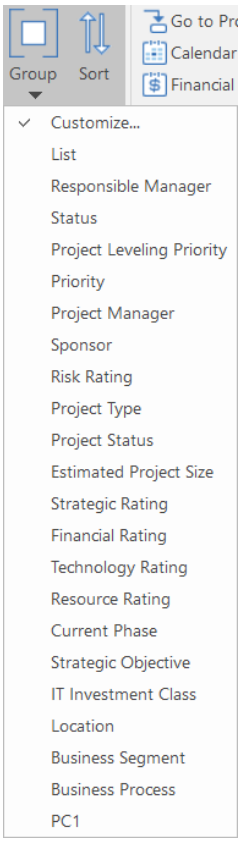


The grouping criteria in the WBS view cannot be edited.

Note: The “Show ID/Code” and “Hide if Empty” are not available for use in the WBS view.

Create custom group in Project view

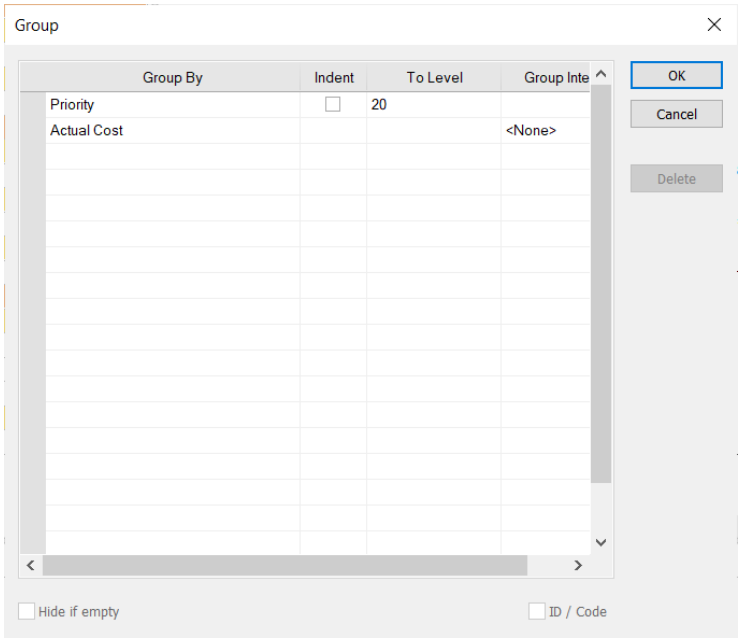
There are 2 ways to group in a project view. The first way is by using the predefined groups that are located in the “Group” menu. The second way is by using the “Customize” dialog, where the user defines the grouping conditions.



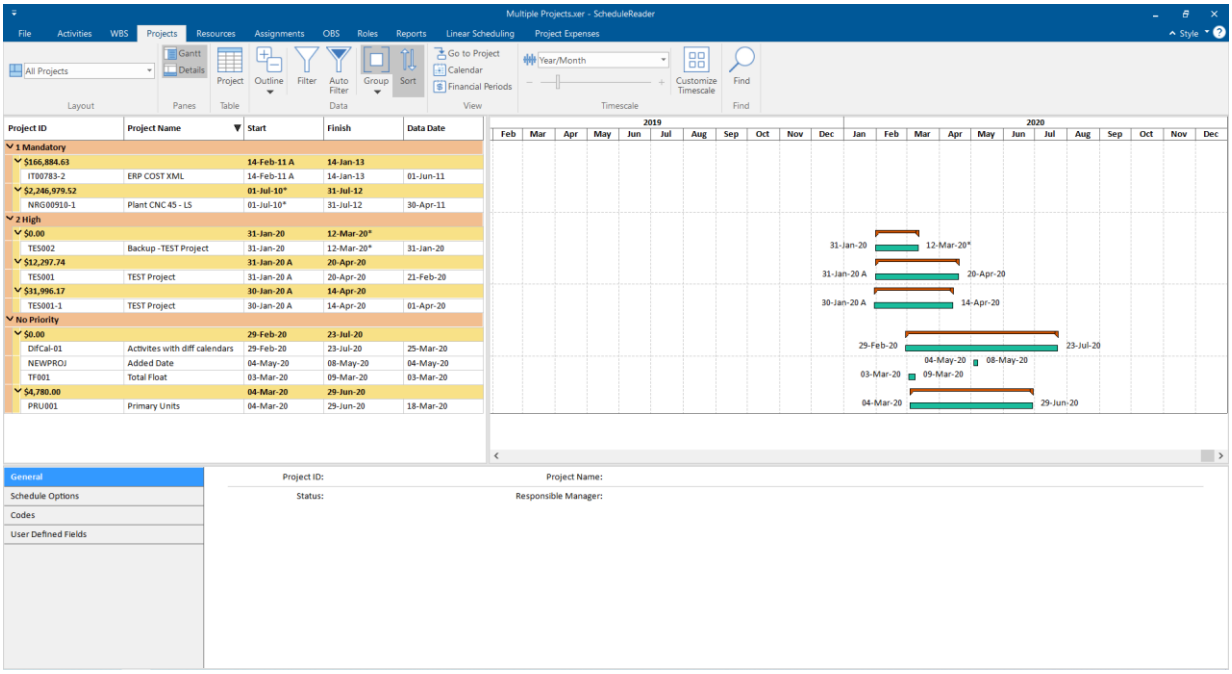
The “Group” feature in the project view is best to use on a master project, ie. when multiple projects are placed in the exported XER or XML file.

If you want to group assignments by different grouping criteria, you have to do the following:

1. Open the **Project** view, by clicking on the **Project** tab.
2. Click on the **Group** option in the ribbon.
3. Select the **Cuzomize** option from the menu.
4. Choose the **Group By** criteria from the dropdown list.
5. Enter additional Interval and Indent Level Values for the grouping criteria.
6. Click **OK**.

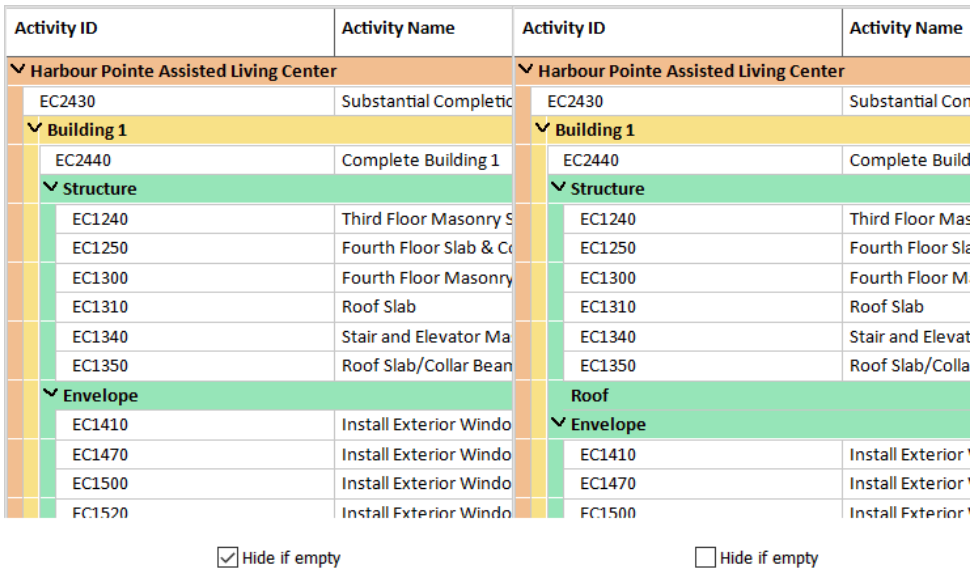


After grouping the projects by different criterias, the Project table and the Gantt chart will look like the image below.



Hide if Empty

The “Hide if Epmty” check-box is used to show or hide empty group title bands in the view. This mean that after grouping the Project view according specific parameters, you have the opportunity to choose whether the group bands that don’t have any activities will be displayed or hide in the view.



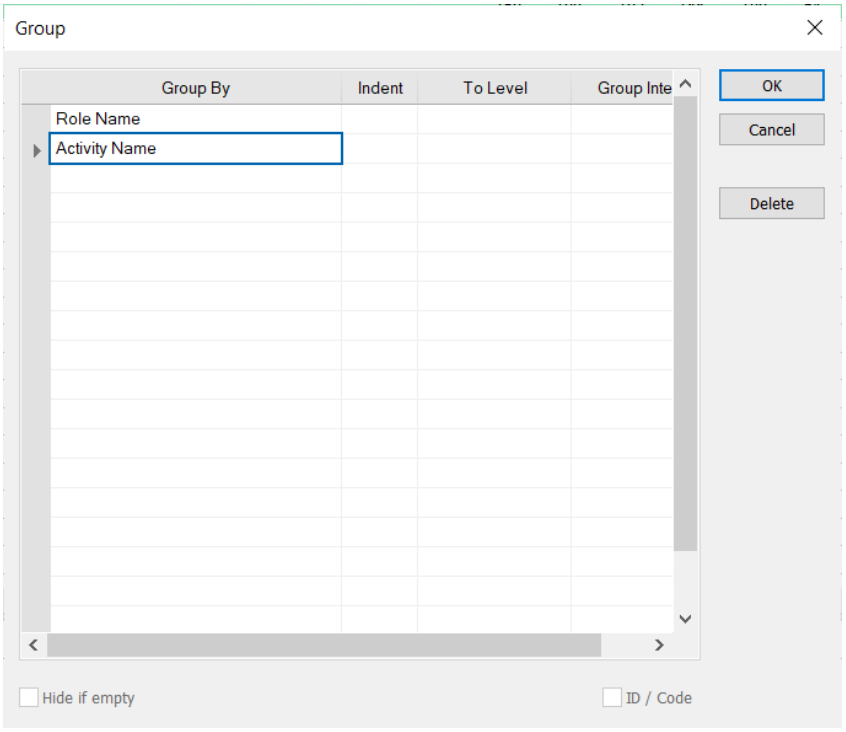
Note: The “Show ID/Code” is not available for use in the Project view.

Create custom group in Assignment view

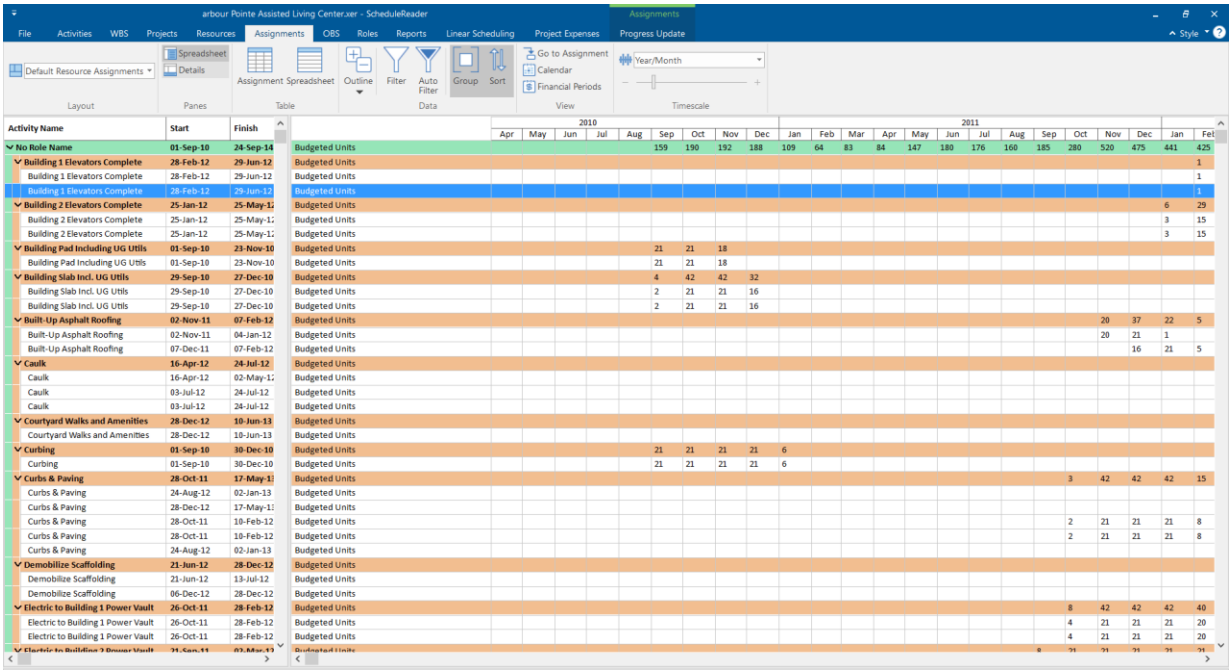
Now you can create your own custom, user-defined groups, where you can view the activities grouped in a certain manner, whether that be an activity status, remaining duration, etc. You can define not only one group condition but specify multiple grouping criteria.

If you want to group assignments by different grouping criteria, you have to do the following:

1. Open the **Assignment** view, by clicking on the **Assignment** tab.
2. Click on the **Group** option in the ribbon.
3. Choose the **Group By** criteria from the dropdown list.
4. Enter additional Interval and Indent Level Values for the grouping criteria.
5. Click **OK**.

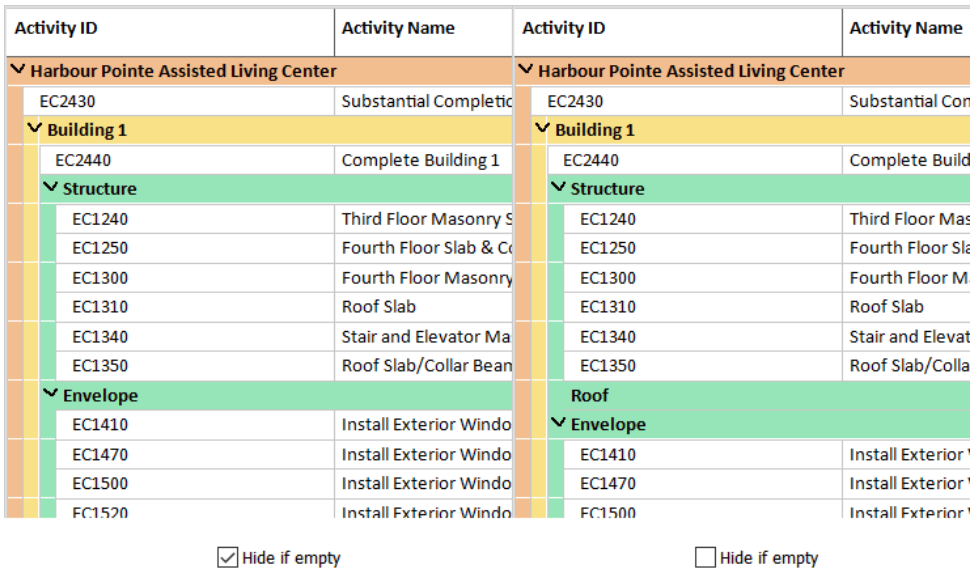


After grouping the assignments by different criterias, the Assignmen table will look like the image below.



Hide if Empty

The “Hide if Epmty” check-box is used to show or hide empty group title bands in the view. This mean that after grouping the Assignment view according specific parameters, you have the opportunity to choose whether the group bands that don’t have any activities will be displayed or hide in the view.



FILTERING DATA

Apply Default, Layout and User-defined filters

You can use filters to display items in a table that meets certain criteria such as milestones, critical activities, in progress or completed activities. In the Filter dialog box, there is a list of **Default filters, Layout Filters** and **User-Defined filters**. You can check multiple filters to be applied to the current table view. To reset any applied filter, you can click on the **Clear Filter** button.

Use one of the following options to show items when more than one filter is selected:

- **All selected filters:** display items that meet all selection criteria in each filter.
- **Any selected filter:** display items that must meet at least one selection criteria.

Layout Filters will be visible in the Filters dialog when you import a custom layout file (PLF). Filters that are not used in the layout are visible under the User-defined Filters category.

Note: Filters that contain fields that are not supported will not be applicable in the table view.

Note:

1. When you import XLS file in ScheduleReader™ the following filters will not work:

- By UDF
- Activity codes
- Calendar
- WBS
- Primary resource

2. When you import XER file the custom filter will not work for:

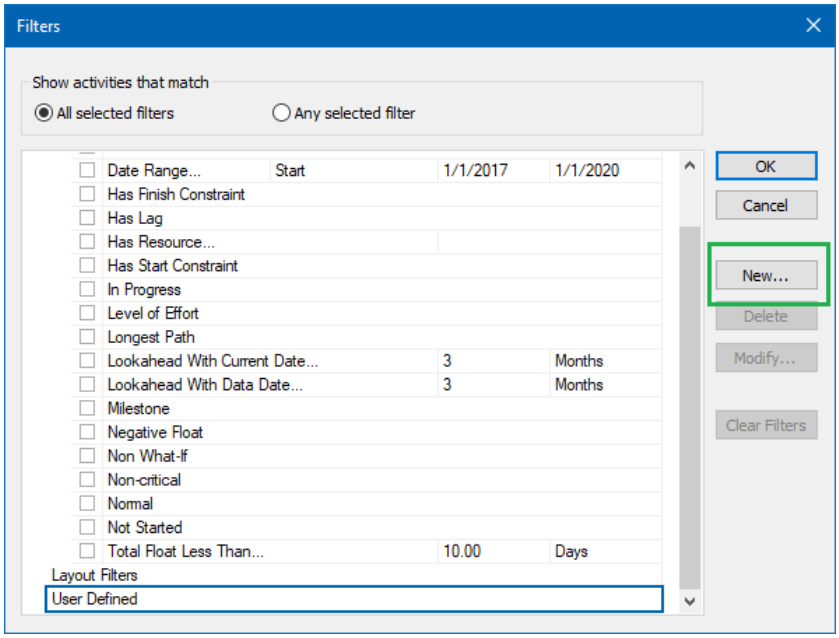
- WBS is under
- Primary resource is under

Activity View

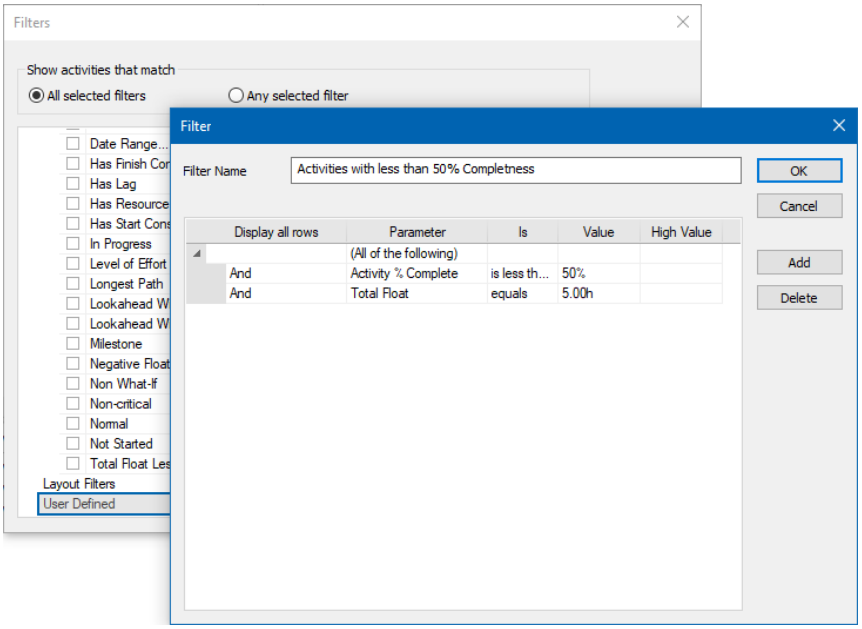
Create custom User-Defined Filters

In ScheduleReader™, you can create custom user-defined filters that can be saved and applied to any project for faster filtering. In order to create a custom filter, you need to take the following steps:

1. In the Activities ribbon tab, click on the ***Filter*** option.
2. In the Filters dialog box, click on the ***New*** button.



3. A new **Filter** dialog opens, and add a name for the new filter e.g. (Activities with less than 50% Complete).
4. Fill in the necessary filter criteria fields:
   - **Displaying all rows** field– Select the logic operator (“And” or “OR”) that will help you to create the filter's logic.
   - **Parameters** field – Displays the chosen parameter for each filter criteria. (e.g. Activity % Complete)
   - **Is** field **–** Contains the corresponding operator for a specific filter criteria
   - **Value/High-Value** fields – Presents the values for each filter criteria
5. In order for the filter criteria to be saved, click OK.
6. To apply the filter, select the checkbox in front of the user-defined filter and click **OK**.



Modify existing User-defined filter

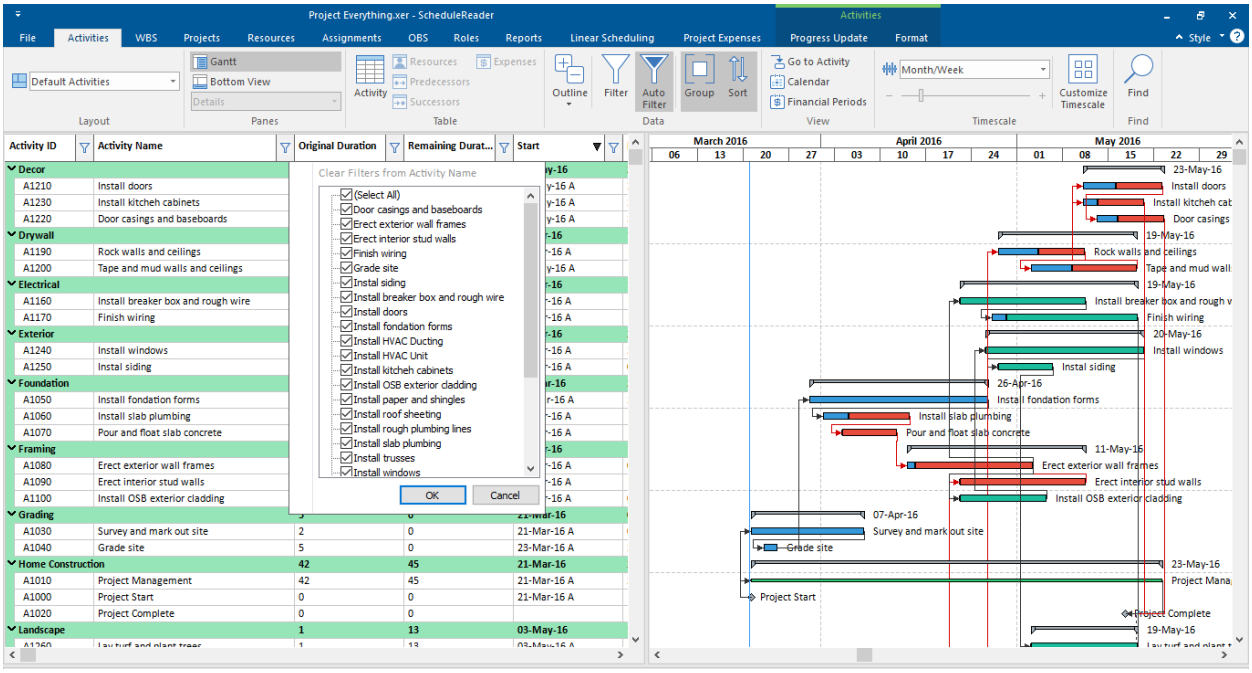
In ScheduleReader™ you can modify existing Custom filter imported with the Layout (PLF) file and User-defined filters which are globally applicable for any project file. To change the filter criteria for a given user-defined filter, do the following steps:

1. Select the desired filter from the Filters dialog.
2. Click on the **Modify** button.
3. Change filter criteria or update with a new condition.
4. Click **OK** to save the changes.

Apply Auto Filter

Use Auto Filter to filter data in columns based on the **cell values**. To turn on the auto filtering option in ScheduleReader™ click on the **Auto Filter** button placed in the Ribbon. In the column header, you will see the filter icon. Filter contains the list of all data cell values, the option to select all values or show blanks.

Note: the **Date values** are always displayed together with the **Time unit**, even though it might not be displayed in a cell because of the chosen date format setting as shown on the image below:



Another specific case is when you filter **Milestones** in ScheduleReader™. Since, the milestone activity has the same start and finish date, for Finish Milestone and Start Milestone in ScheduleReader™ whether the date is displayed as empty the Auto Filter option will show the same date as for the start or finish.

To clear a specific column filter, select the **Clear filter** option from the drop-down menu. If would you like to clear all auto filters, applied “Turn-off” the Auto Filter button.

Note: If you remove the column, where the filter is applied, the applied filter won't be removed.

If you change layout all filters will be reset.

Assignment view

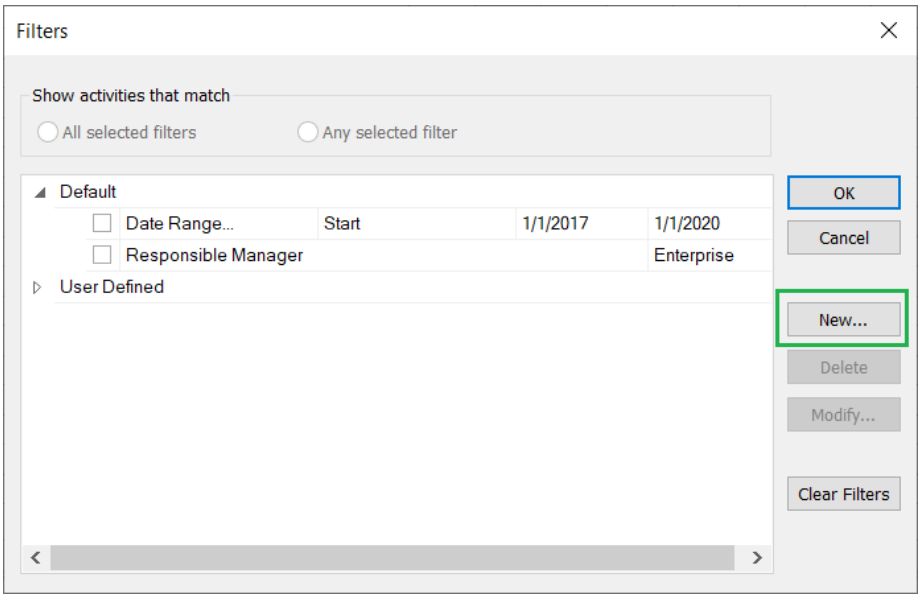
The filtering functionality in the Assignments view comes with predefined and user-defined filters. Unlike the other views, only one filter at time can be applied in the Assignment view

In addition to the user-defined filters, the layout filters imported in ScheduleReader can be used and modified. Once the layout filters are imported, they will be placed in the “User Defined” category.

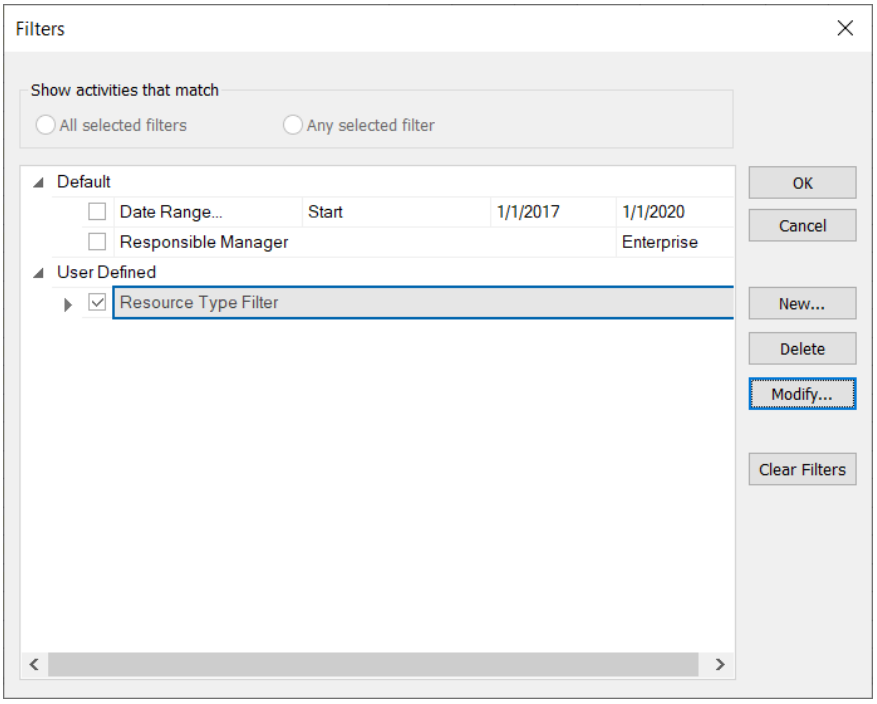
Create User-Defined Filters

In order to create a custom filter, you need to take the following steps:

1. In the Assignment ribbons, click on the ***Filter*** option.
2. In the Filters dialog box, click on the ***New*** button.



3. In the newly opened dialog, and add a name for the new filter e.g. (Activities with less than 50% Complete).
4. Fill in the necessary filter criteria fields:
    - **Displaying all rows** field– Select the logic operator (“And” or “OR”) that will help you to create the filter's logic.
    - **Parameters** field – Displays the chosen parameter for each filter criteria.
    - **Is** field **–** Contains the corresponding operator for a specific filter criteria
    - **Value/High-Value** fields – Presents the values for each filter criteria
5. In order for the filter criteria to be saved, click OK.
6. To apply the filter, select the checkbox in front of the user-defined filter and click **OK**.



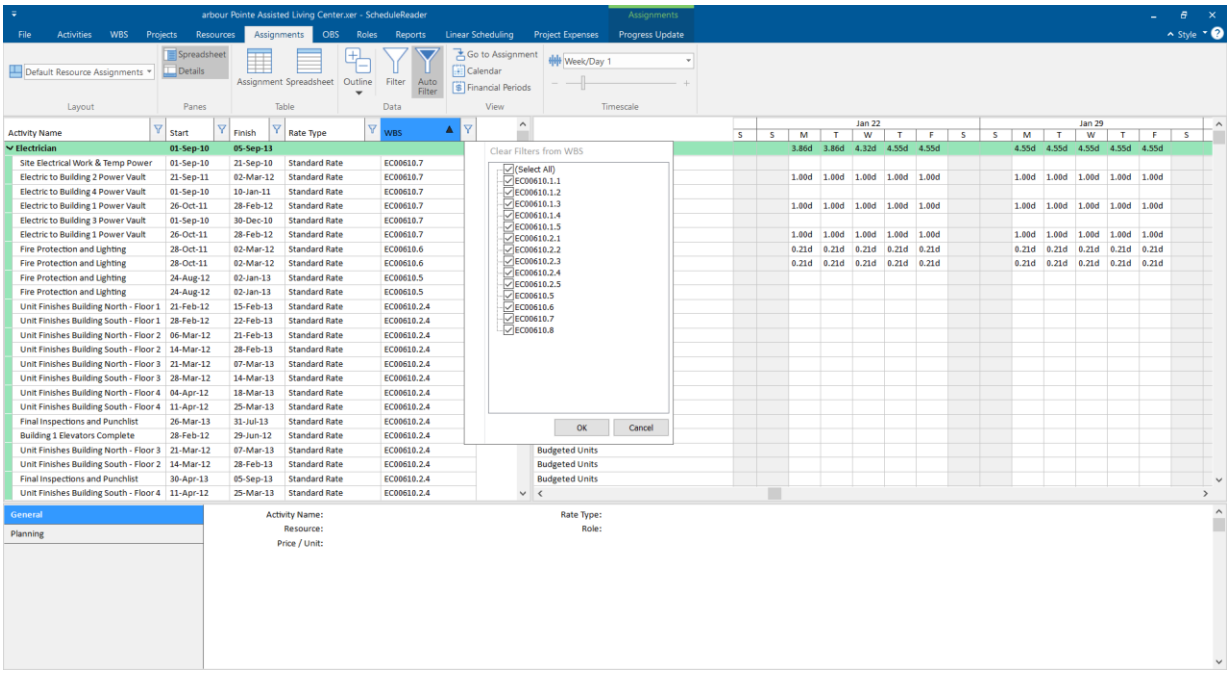
Modify existing User-defined filter

In ScheduleReader™ you can modify existing Custom filter imported with the Layout (PLF) file and User-defined filters which are globally applicable for any project file. To change the filter criteria for a given user-defined filter, do the following steps:

1. Select the desired filter from the Filters dialog.
2. Click on the **Modify** button.
3. Change filter criteria or update with a new condition.
4. Click **OK** to save the changes.

Apply Auto Filter

Use Auto Filter to filter data in columns based on the **cell values**. To turn on the auto filtering option in ScheduleReader™ click on the **Auto Filter** button placed in the Ribbon. In the column header, you will see the filter icon. Filter contains the list of all data cell values, the option to select all values or show blanks.

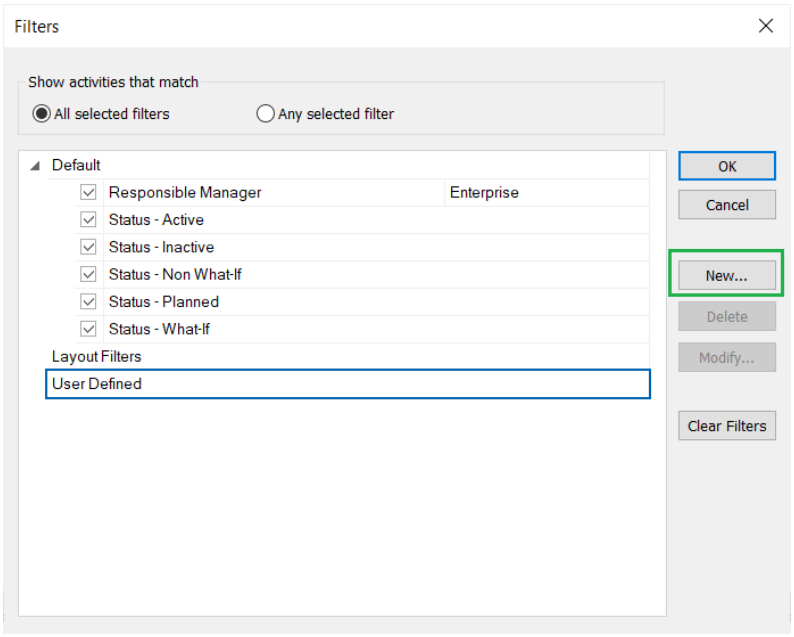


Project View

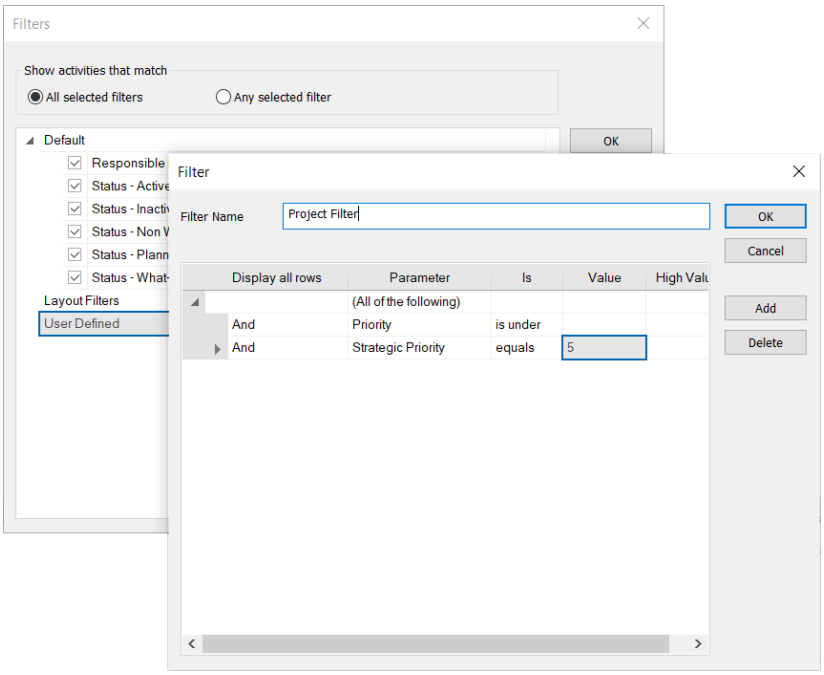
Create custom User-Defined Filters

In ScheduleReader™, you can create custom user-defined filters that can be saved and applied to any project for faster filtering. In order to create a custom filter, you need to take the following steps:

1. In the Project ribbon tab, select the ***Filter*** option.
2. In the Filters dialog box, click on the ***New*** button.



3. A new **Filter** dialog opens, and add a name for the new filter e.g. (Activities with less than 50% Complete).
4. Fill in the necessary filter criteria fields:
    - **Displaying all rows** field– Select the logic operator (“And” or “OR”) that will help you to create the filter's logic.
    - **Parameters** field – Displays the chosen parameter for each filter criteria. (e.g. Activity % Complete)
    - **Is** field **–** Contains the corresponding operator for a specific filter criteria
    - **Value/High-Value** fields – Presents the values for each filter criteria
5. In order for the filter criteria to be saved, click OK.
6. To apply the filter, select the checkbox in front of the user-defined filter and click **OK**.



Modify existing User-defined filter

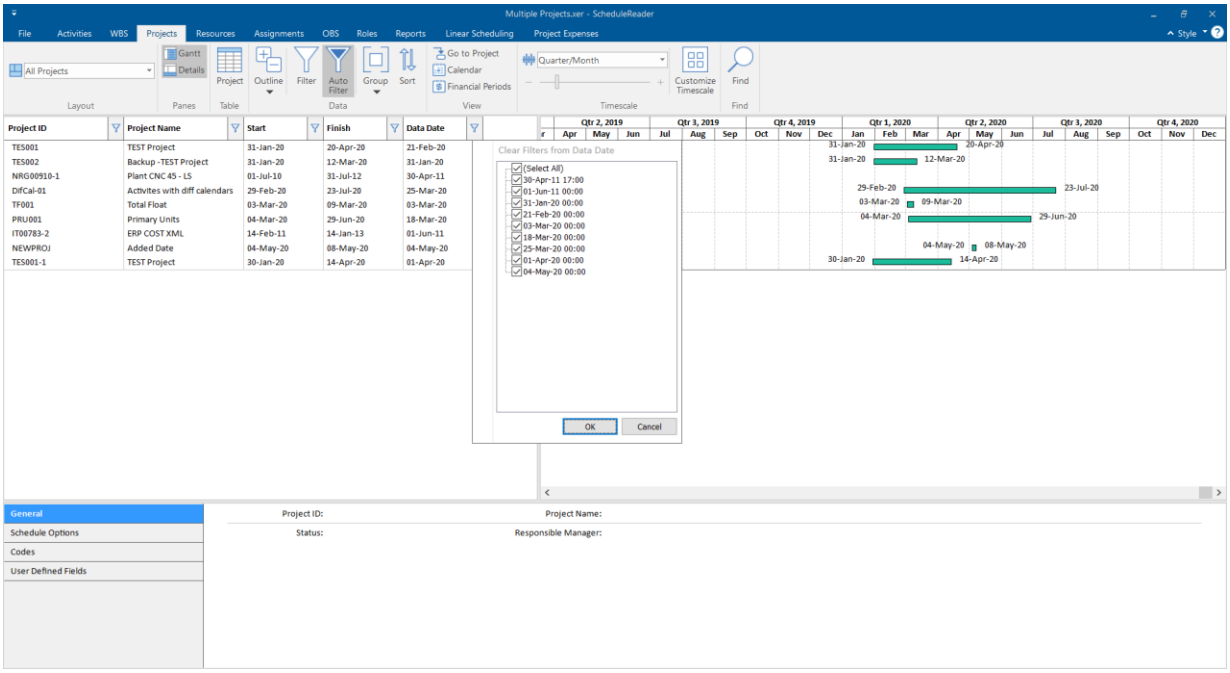
In ScheduleReader™ you can modify existing Custom filter imported with the Layout (PLF) file and User-defined filters which are globally applicable for any project file. To change the filter criteria for a given user-defined filter, do the following steps:

5. Select the desired filter from the Filters dialog.
6. Click on the **Modify** button.
7. Change filter criteria or update with a new condition.
8. Click **OK** to save the changes.

Apply Auto Filter

Use Auto Filter to filter data in columns based on the **cell values**. To turn on the auto filtering option in ScheduleReader™ click on the **Auto Filter** button placed in the Ribbon. In the column header, you will see the filter icon. Filter contains the list of all data cell values, the option to select all values or show blanks.

Note: the **Date values** are always displayed together with the **Time unit**, even though it might not be displayed in a cell because of the chosen date format setting as shown on the image below:



Another specific case is when you filter **Milestones** in ScheduleReader™. Since, the milestone activity has the same start and finish date, for Finish Milestone and Start Milestone in ScheduleReader™ whether the date is displayed as empty the Auto Filter option will show the same date as for the start or finish.

To clear a specific column filter, select the **Clear filter** option from the drop-down menu. If would you like to clear all auto filters, applied “Turn-off” the Auto Filter button.

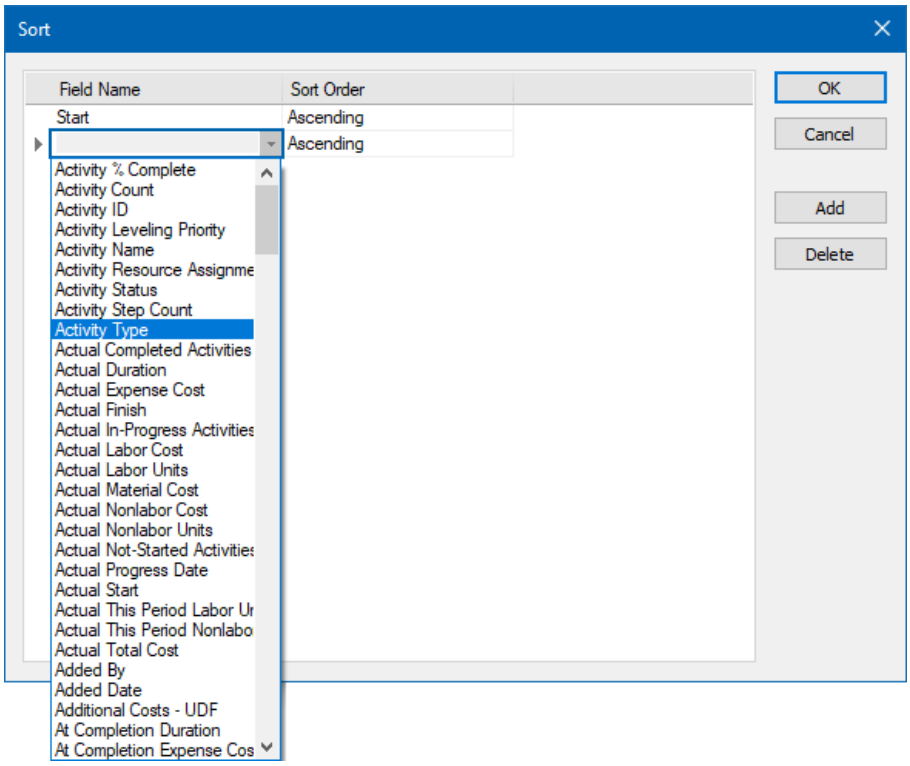
Note: If you remove the column, where the filter is applied, the applied filter won't be removed.

Note: If you change layout all filters will be reset.

SORT DATA

ScheduleReader™ supports different sorting options for the activities shown in the Activity view. Users can sort the information in any custom way they want, specifying their own sorting criteria. To apply different sorting criteria, that will match your needs, do the following steps:

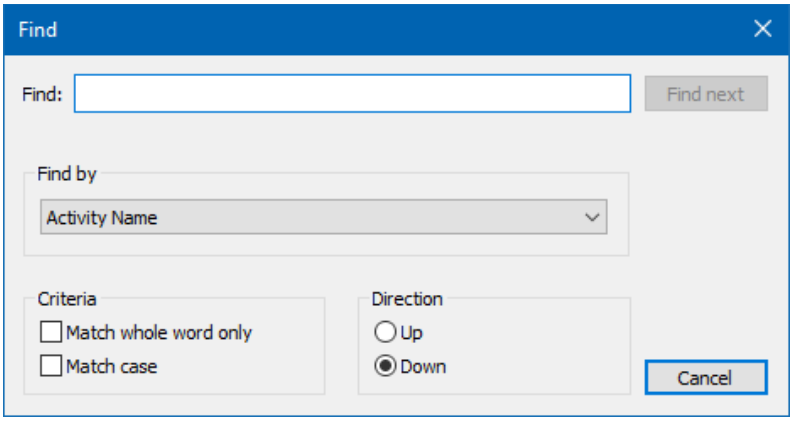
1. Click on the Sort feature in the **Activities** ribbon;
2. In the **Field Name** drop-down list select the field that will present the criteria according to the sorting process that will be performed.
3. Select the sorting order by choosing the **Ascending** or **Descending** options from the same name column.
4. In case, the sorting criteria are more complicated, ScheduleReader allows you to add additional fields by using the **Add** button.
5. After hitting the **Ok** button, the sorting criteria will be applied in the view.



FIND DATA

Use the Find dialog box to search for an item in the current Table.

1. From the **Find by** dropdown menu select a column name to search in;
2. Choose the criteria to **Match whole world** (phrase) or **Match case** (upper and lower letters);
3. In the **Find** field enter the word and click on **Find Next**;
4. Can change the **direction** of searching to up or down.



Time-Location view

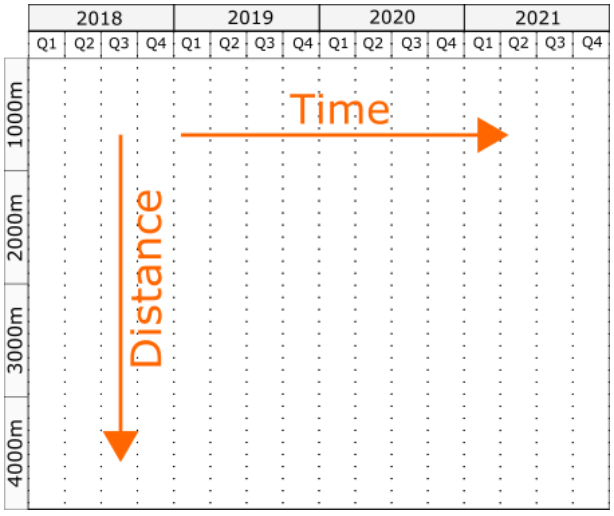
INTRODUCTION

Time-Location view (other names: Time-Location chart, Time-Distance chart, etc.) is a view that is used in projects that have repetitive activities. Repetitive activities are commonly found in projects for gas and oil pipelines, rails, bridges, tunnels, roads, high-rise buildings, transmission lines construction, etc. In the industry, these projects are known as linear projects.

The time-location chart will help project managers and team leaders to view the time and location at which certain project teams will be work on the specified project's assignment.

MAIN ELEMENTS

The time-location chart consists of two axes: one for the distance (location) and the other for a time. In ScheduleReader, the time axis is presented in a month, while for the distance axis the units depend on the metric that is inserted in the user-defined field.



Each activity in the Time-Location chart is presented with a specific bar. The following bar shapes are available in ScheduleReader:

- Line – line shape in a time-location chart is used to represent simple activity that is undertaken by a particular project team, such as pulling telecommunication or transmission line cable, asphalting specific sections of the highway, etc. The project team starts working on the given start location, on the specified start date and work until reaching the finish location on the planned finish date.
- Bar – similar to the line shape. The difference is in the time needed to complete the assignment.
- Block – when project activity lasts a significant time, it is represented in the chart with block shape. In this case, the one side length of the rectangle corresponds with the time needed for completing the activity, while the length of the other side corresponds with the amount of assigned work.
- Diamond – as in the traditional presentation of the project plan, diamond bar shape represents a milestone, a specific point on the project timeline.

Which bar will be assigned to each project activity, depends on the user's decision.

VIEW TIME-LOCATION CHART IN SCHEDULEREADER

Linear project plans from Civil Engineering and Construction (Traffic engineering, Highway engineering, Railway systems engineering, Tunnel Engineering) and Power engineering and construction (Power line engineering) can be created and managed in Primavera P6.

In order to view the project plans in Time-Location diagram, project schedulers must create three user-defined fields (UDF):

- Two fields (data type: Number) for starting and ending point of the activity,
- One field (data type: Text) for activity shape.

Create User-Defined field

Creating User-Defined Fields (UDF) is performed in Primavera P6. The process consists of the following steps:

1. Click on the “Enterprise” menu and select the “User Defined Fields…”.
2. In the “User Defined Fields” dialog select the “Activity” option in the drop-down list and click on the “Add” button.
3. Create the first user-defined field that will represent the starting point for the activity by clicking on the “Add” button.
4. In the title field enter “LINEAR_START_POSITION”. Select “Number” for Data Type.

Title	Data Type
LINEAR_START_POSITION	Number

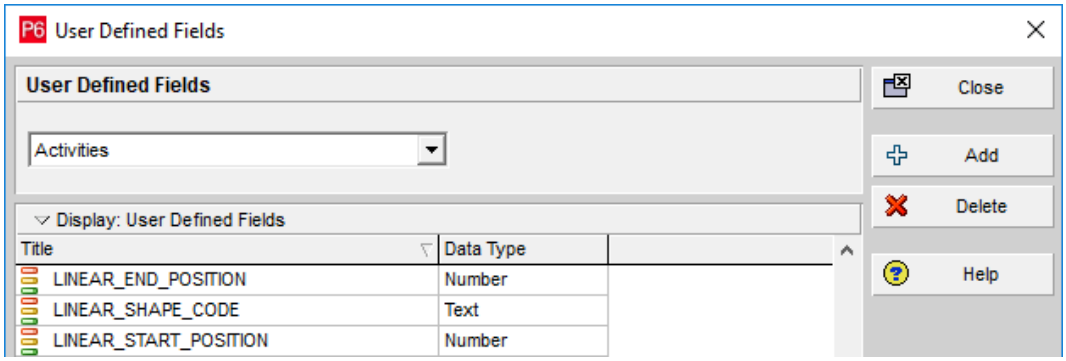
5. Create the second user-defined field that will represent the ending point for the activity by clicking on the “Add” button.
6. In the title field enter “LINEAR_END_POSITION”. Select “Number” for Data Type.

Title	Data Type
LINEAR_END_POSITION	Number

7. Create one user-defined field with the title “LINEAR_SHAPE_CODE” and select “Text” for Data type.

Title	Data Type
LINEAR_SHAPE_CODE	Text

8. After creating the mentioned fields, the “User Defined Fields” dialog will look like the image below.



9. Close the dialog.

Important Note: UDFs names must be inserted as in the example: "LINEAR_START_POSITION", "LINEAR_END_POSITION" and "LINEAR_SHAPE_CODE". Otherwise, the application will inform you that the required fields, for drawing the time-location diagram, are missing from the project.

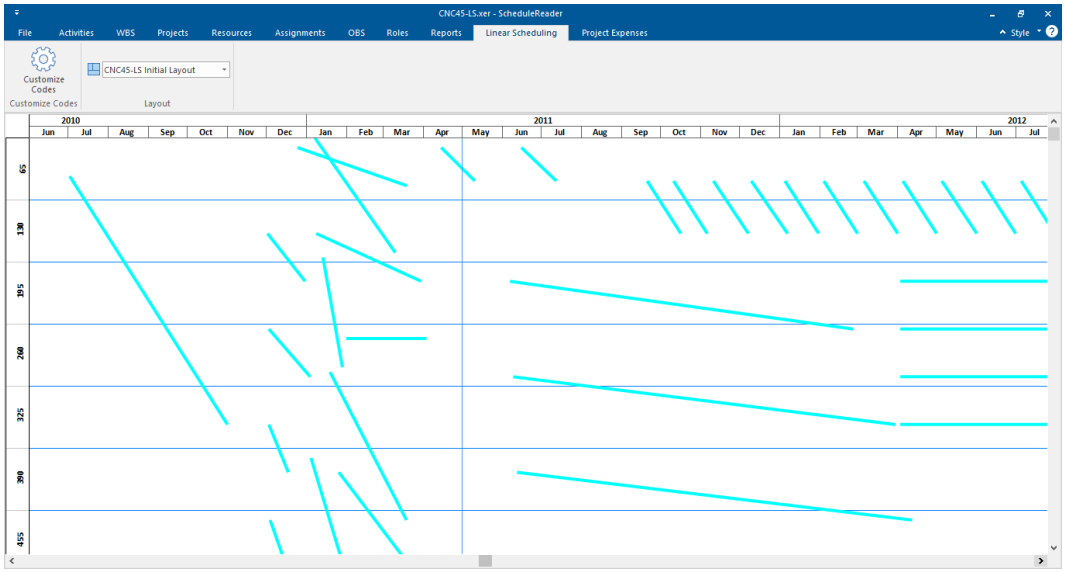
Once the UDFs are created, insert them in the Activity table and populate the values for Start Point", "End Point" and "Shape". Example for populating these fields is presented on the image below:

Activity ID	Activity Name	Start	Finish	LINEAR_START_POSI...	LINEAR_END_POSITI...	LINEAR_SHAPE_CODE
Bridge Construction		19/04/18	20/05/06			
Foundations		19/04/18	19/10/02			
A1060	Foundation 1	19/04/18	19/05/29	40.00	50.00	Block
A1070	Foundation 2	19/05/30	19/07/10	90.00	100.00	Block
A1080	Foundation 3	19/07/11	19/08/21	40.00	50.00	Block
A1090	Foundation 4	19/08/22	19/10/02	90.00	100.00	Block

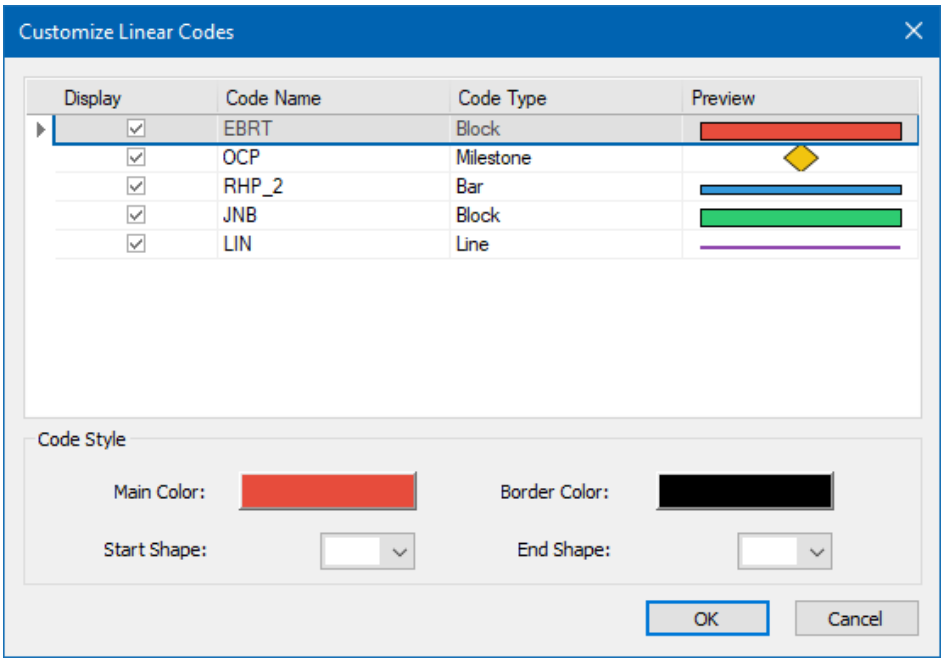
Apply Time-Location chart

When the project file is loaded, ScheduleReader checks whether the mentioned user-defined fields (LINEAR_START_POSITION, LINEAR_END_POSITION and LINEAR_SHAPE_CODE) exists in the .xer file. If these fields are not part of the project plan, the ScheduleReader will pop-up a message when a time-location diagram is selected.

The initial look of the time-location diagram for any project is presented on the image below.

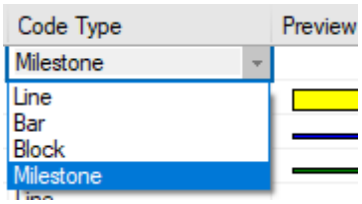


Chart's customization can be done using the "Customize Codes" option. Using this dialog, users can choose whether the cone bar will be presented or not, choose the graphical type that will be associated with specific code and the object's colors as well.



Chart's customization is performed with the following steps:

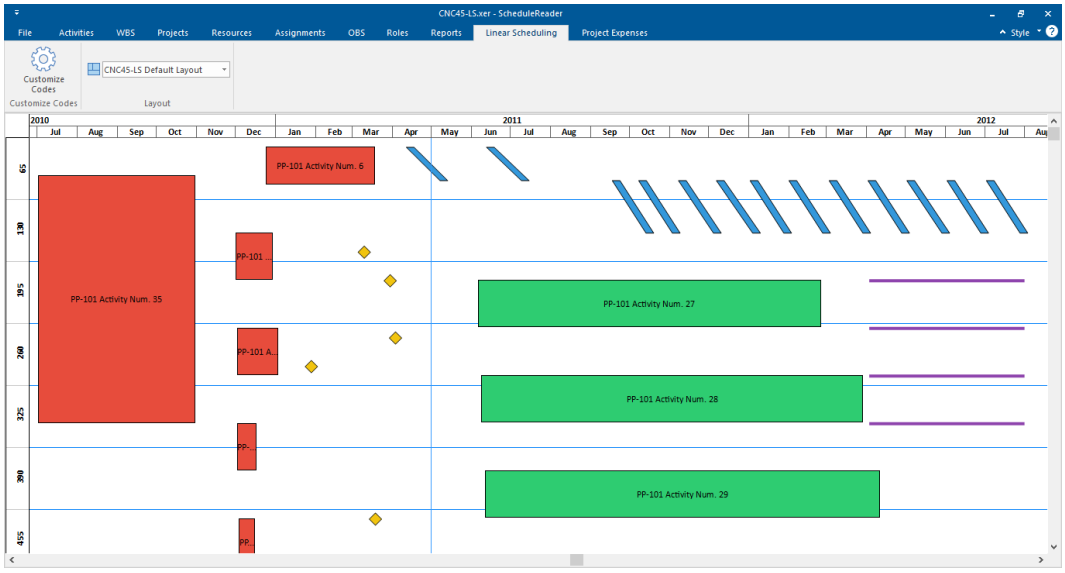
1. Using the check-boxed in the "Display" column, the user decides whether that particular shape will be presented in the view or not;
2. Each field from the "Code Type" column contains a drop-down list with the available shapes. By default, all codes have a "Line" type, but the user can change it.



3. Changing the color of a specific code is done by using the features in the “Code Style” section. User can change the “Main Color” and the “Border Color”.
4. Assigning start and finish shapes can be done by using the eponymous functionalities from the “Code Style” section.

After customization, the view will be changed according to the standards, rules and recommendations that are used in each company when linear projects are managed.

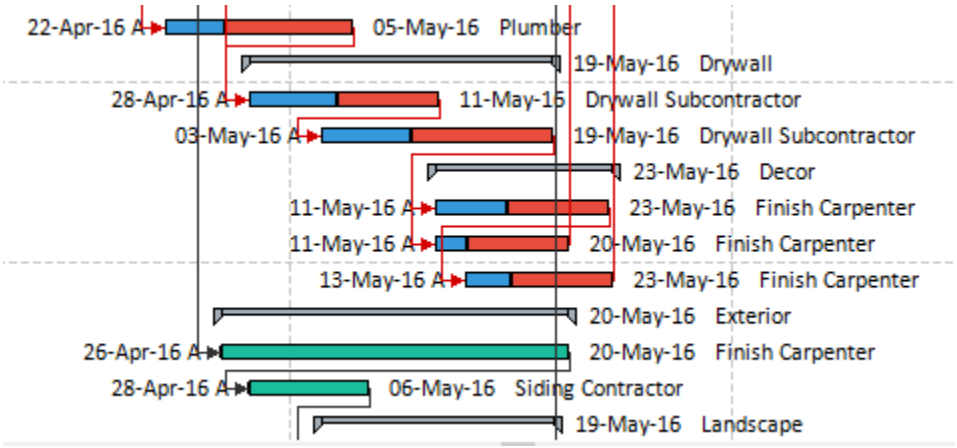
The initial project, that is loaded as an example in ScheduleReader, after customization will look like the image below.



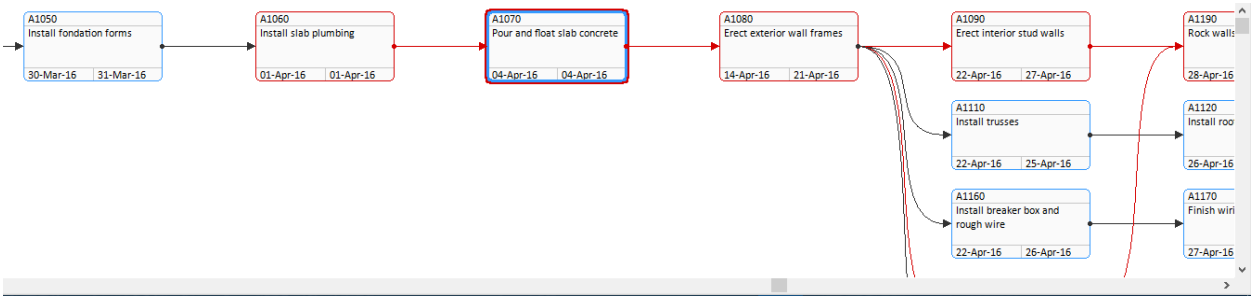
Critical Path and Driving Activities

CRITICAL PATH

The critical path is a chain of project activities that determine the project's end date. Each activity with its duration defines when the project plan will be finished. Thus, completing the activities from the critical path on time is of great importance and will guarantee to fulfill the project goals and complete the project milestones.

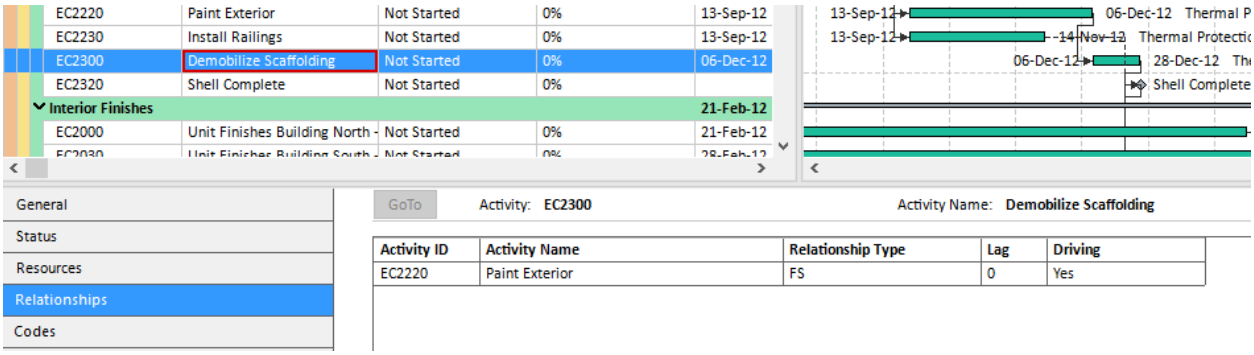


Every critical task when viewed in Activity view in ScheduleReader™ is colored red together with the relationships toward predecessor(s) and successor(s). If the same activities are viewed in Trace Logic view, they will be presented with boxes rounded with the red line and their relationships will be colored red too.



DRIVING ACTIVITIES

The project plan is a set of activities connected with different types of connections. Having thousands of tasks in your project plan, it is hard to detect which activities are of great importins and defines the end date of your project plan. Thus, using the “Driving Activities” feature ScheduleReader users can clearly view the activities that drive the project and needs more attention and analysis. The relations between driving activities are presented with a solid line.


EC2220 Paint Exterior Not Started 0% 13-Sep-12
EC2230 Install Railings Not Started 0% 13-Sep-12
EC2300 Demobilize Scaffolding Not Started 0% 06-Dec-12
EC2320 Shell Complete Not Started 0%
Interior Finishes 21-Feb-12
EC2000 Unit Finishes Building North - Not Started 0% 21-Feb-12
13-Sep-12
06-Dec-12 Thermal P
13-Sep-12
14-Nov-12 Thermal Protecti
06-Dec-12
28-Dec-12
Shell Complete
General
Status
Resources
Relationships
Codes
GoTo
Activity: EC2300
Activity Name: Demobilize Scaffolding
Activity ID
Activity Name
Relationship Type
Lag
Driving
EC2220
Paint Exterior
FS
0
Yes

Manage Layouts

Within ScheduleReader™ there are default layouts for the activities, WBS, projects, resources and assignments. The layout consists of information about the arrangement of different table elements in the appropriate view: Activities, WBS, Projects, Resources and Assignments View. There are several ways to manage layouts in ScheduleReader™:

- Import a layout
- Export a layout
- Copy a Layout
- Rename, Reset and Remove a Layout

IMPORT CUSTOM LAYOUTS

In ScheduleReader™, you can use your custom made layouts in Oracle Primavera P6 by importing the **.plf file** format. The layouts bring the information on applied grouping, sorting and user-defined filters.

To **import custom layout** follow these steps:

1. From **File** Menu, click on the Layouts Submenu**;**
2. Click on the **Import** Option.
3. Choose a PLF file from the desired location.
4. Click on the **Open** button to import the layout.

EXPORT A LAYOUT

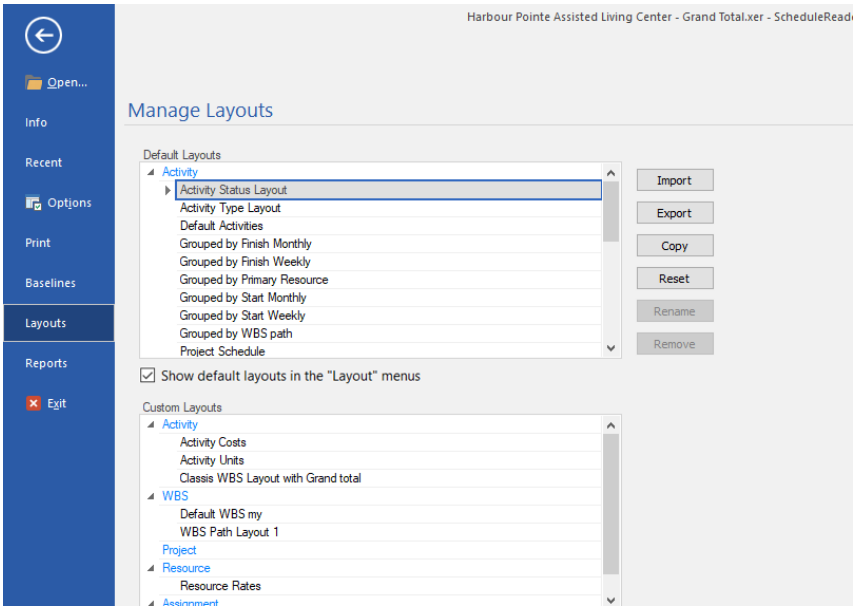
In ScheduleReader™ you can use your custom made layouts in Oracle Primavera P6 by importing the **.plf file** format. The layouts bring the information on applied grouping, sorting and user-defined filters.

To **export** a layout follow these steps:

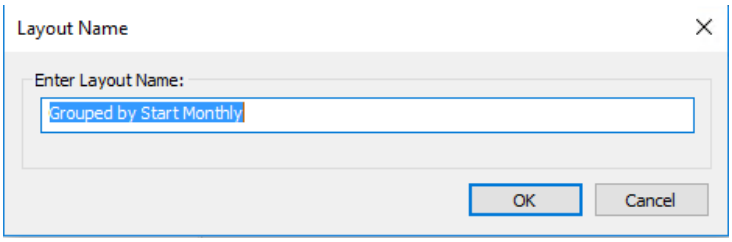
1. From **File** Menu, click on the Layouts Submenu**;**
2. Click on the **Export** Option.
3. Choose the desired location where the file will be saved.
4. Click on the **Save** button to export the layout as an **XML** file.

CREATE A LAYOUT

You can easily create a new layout by copying a default layout or copying an imported layout in the Manage Layouts view. Follow these directions, to create a new layout.

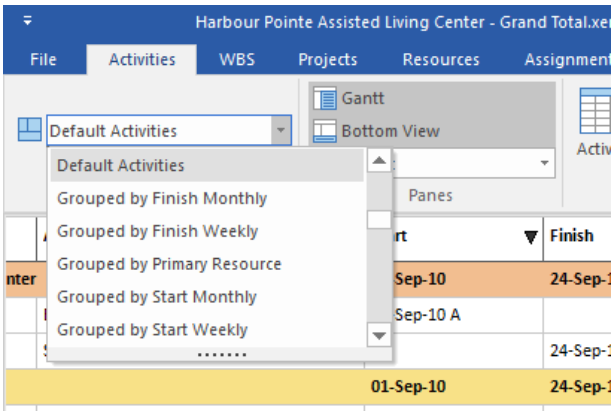


1. From **File** Menu, click on the Layouts Submenu**;**
2. Select the desired layout and click on the **Copy** Option.
3. Rename the new, copied layout.
4. Click on the **OK** button to finish creating the new layout.



Once the custom layout is created, return to the activity view. The next step is to apply the created layout and make some modification:

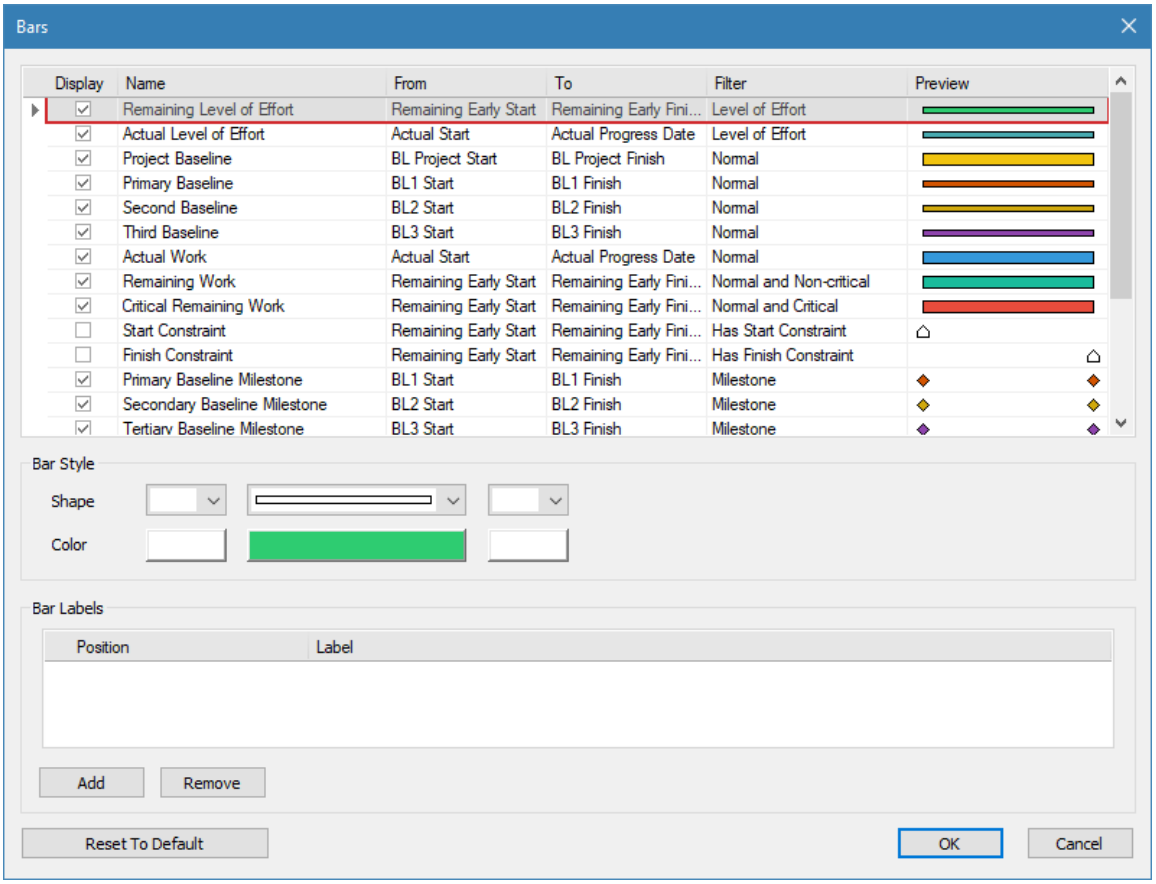
1. From the Layout drop-down menu in the Activity ribbon, select the layout that you have created it. Usually, the layout is located at the bottom of the list;



2. You can make customization in the layout by:
    - Add new columns;
    - Remove existing columns from the table;
    - Change the colors of the bars;
    - Add bar labels;
    - Apply specific filter;
    - Apply a specific group;

Note: Adding or removing columns from the Activity table can be done using the Activity Table feature.

Note: Customizing the Gantt chart can be done using the Bars feature, from the Format ribbon. The dialog where these customizations can be done is presented in the image below.

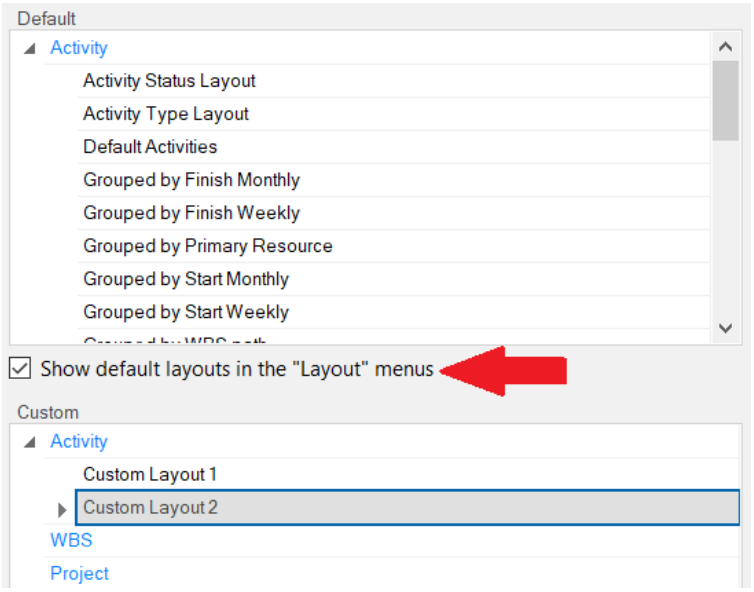


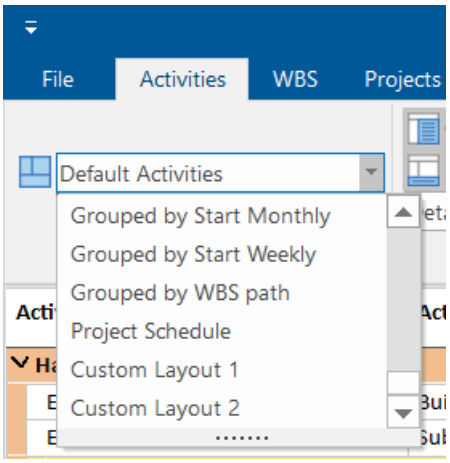
SHOW/HIDE DEFAULT LAYOUTS

In order to enable better management of the layouts and create a better working environment that will be useful to our users, we have implemented a functionality that allows temporary removal of default layouts from the appropriate menus in all views.

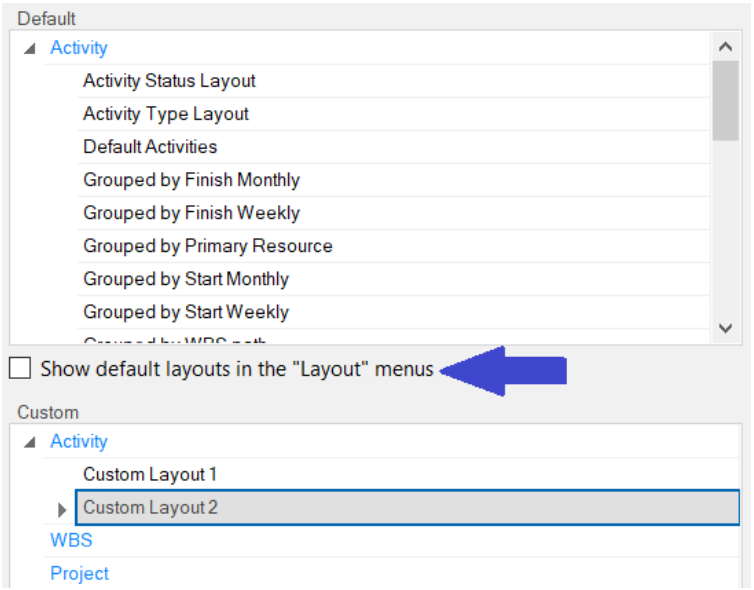
“Show default layouts” is a functionality that will remove all layouts that are implemented by default in the application from the corresponding menus in all views (Activity, WBS, Project, Assignment, Resources, etc.), while layouts that are created by the users or imported will be displayed in the menus.

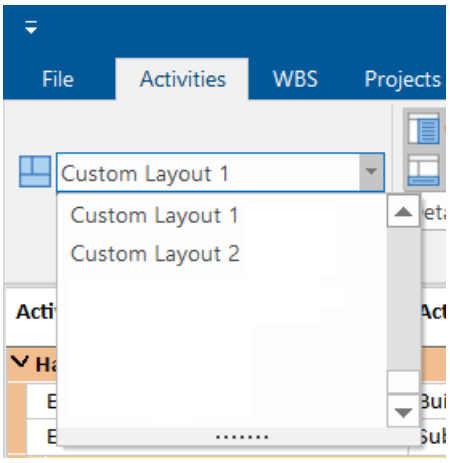
If the “**Show default layouts**” check-box is **selected** in the Layou menu, then “Layout” menu will contain all the layouts, as it is presented on the image below.





In case the “**Show default layouts**” check-box is **unselected** in the Layou menu, then “Layout” menu will contain only the custom layouts, as it is presented on the image below.

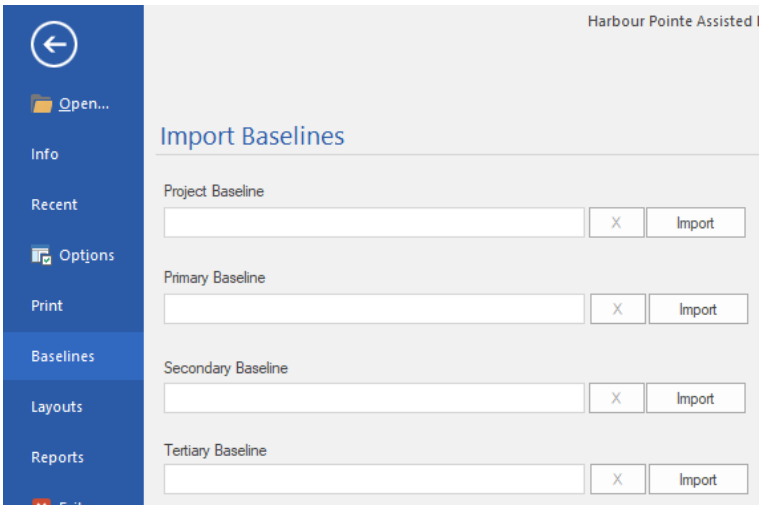




Baselines

COMPARE PROJECTS

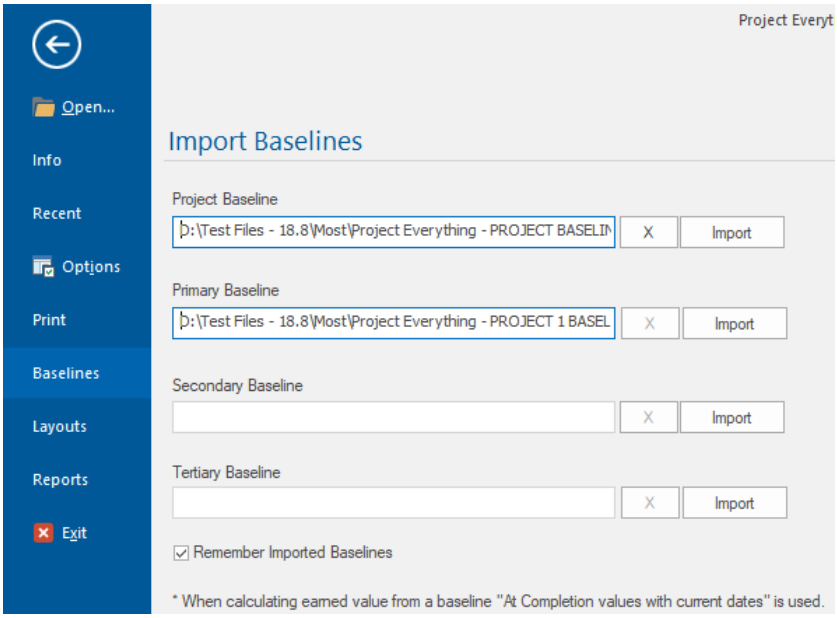
To compare several **updated versions of a project file** in ScheduleReader™ use the **Baselines** functionality placed in the **File** menu. You can import **up to four baselines** as shown on the image below:



Importing Baselines from XER file

For importing baselines using the XER file, perform the following steps:

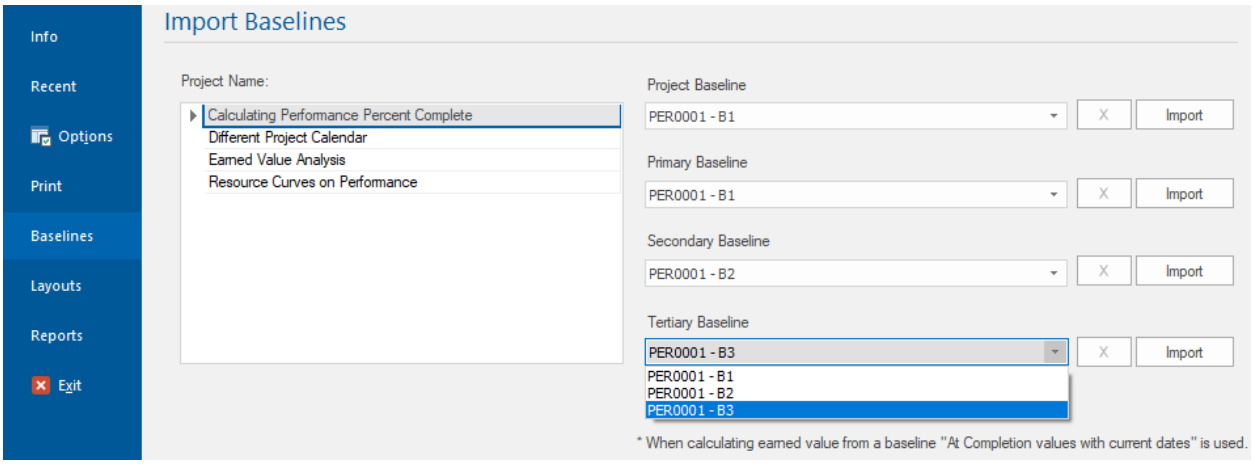
1. Open the XER file;
2. In the **File** menu, click on the Baseline sub-menu;
3. The baselines are inserted in ScheduleReader using the **Import** button;
4. Navigate to the location where the XER file that represents the baseline is placed.
5. Click on the **Open** button in the dialog.



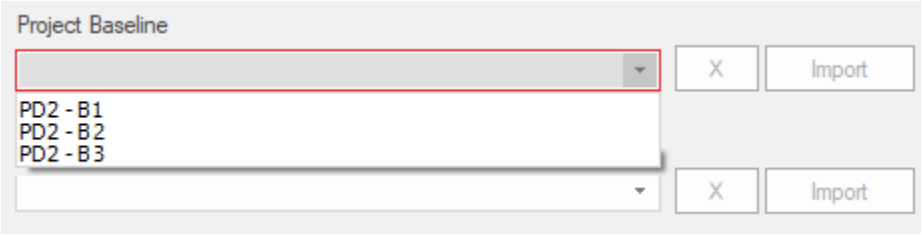
Importing Baselines from .xml file

The procedure for adding baselines from .xml file is a little bit different compared with the previous one because the baselines are saved in the .xml file, together with the project plan.

1. Open the .**xml** file, that contains baselines;
2. In the **File** menu, click on the **Baseline** sub-menu;
3. In the "**Project**" table select the appropriate project, on which the baselines will be applied;



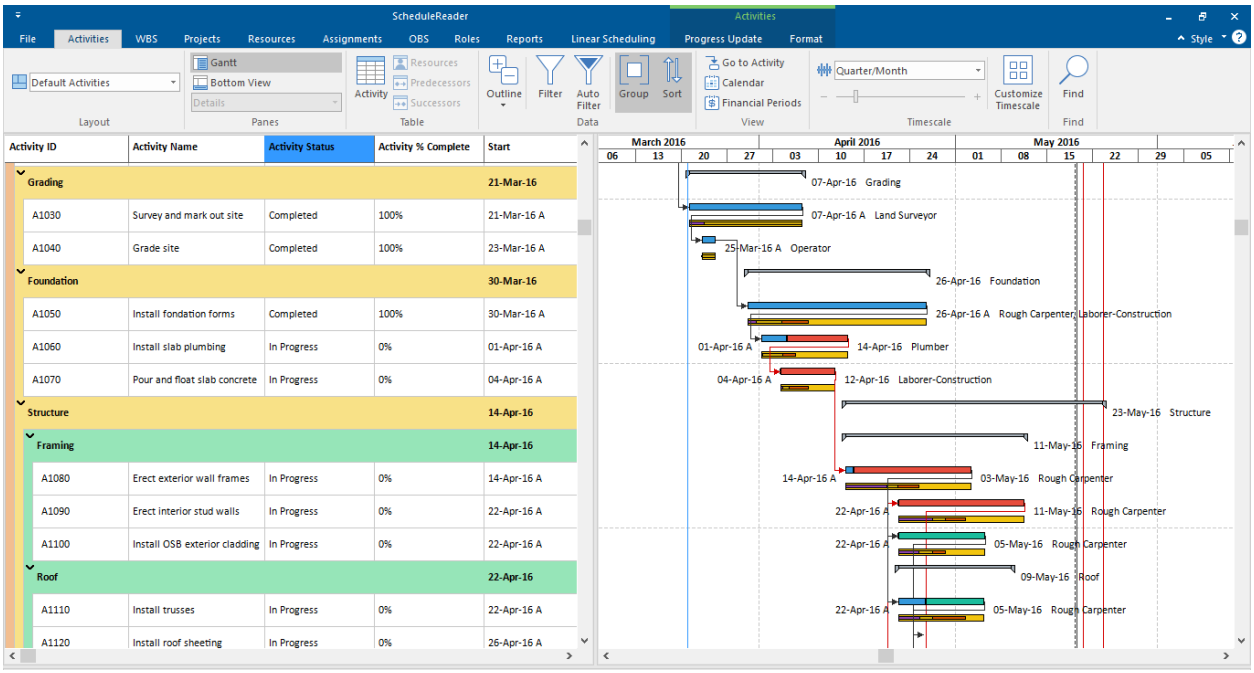
4. Under the **desired baseline category** (Project, Primary, Secondary or Tertiary) click on the drop-down symbol and select the appropriate baseline;
5. Once the baseline is selected, click on the "**Import**" button.



Note: When you compare projects use the same project with the **same activities IDs**. The baseline values in ScheduleReader™ are displayed as exported in the XER files. When calculating earned value from a Baseline "**At competition values with current date**" option is used.

Note: "Remember Imported Baselines" functionality will allow you to save the baselines once they are imported. This means that each time the appropriate project plan is open, the baselines will be loaded automatically. Once the baselines projects are loaded into the application, they should not be renamed, deleted or relocate from their original location. "Remember Imported Baselines" feature works per project.

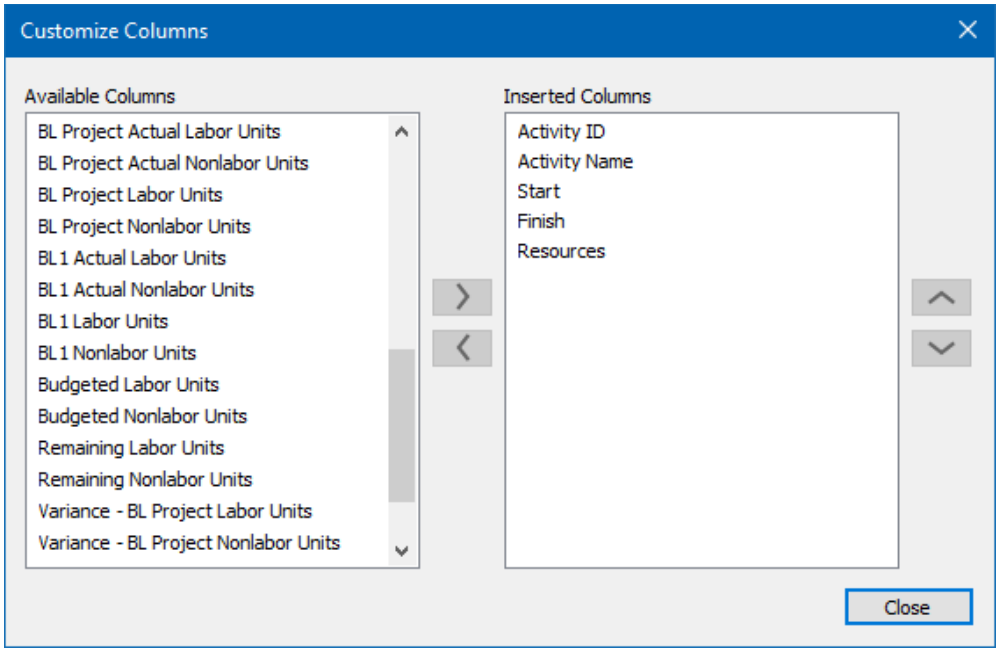
In the Gantt chart, you can see the graphical presentation of the Baselines bars, given right below the original activity bar so you can easily compare the schedule changes that have been made.



Here is the **legend of bars** displayed in Gantt chart:

- The light yellow bar shows the Project baseline
- The orange bar shows the Primary baseline
- The dark yellow bar shows the Secondary baseline
- The purple bar shows the Tertiary baseline

To get the exact values of Baselines, in Activity table you should add the corresponding **Baselines columns** from **Activity Table**:



Note: If baseline columns are empty, this means that that there is no change made on these activities from the original project.

If in the Baseline project there are more activities than in the main project, these activities will not be shown in the Gantt chart, science there is no activity in the main project to compare with.

Earned Value Analysis

OVERVIEW

Earned Value Analysis (EVA) is an advanced PM technique for measuring project performance according to costs and schedules. The concept that EVA relays on is on comparing the planned work with the work that is actually done, at a specific date (usually the Data Date). Knowing the schedule variance and cost variance, project managers and the other project officials will be able to determine the exact state of the project and make decisions that will contribute to the timely fulfillment of project objectives.

The calculation for EVA in ScheduleReader™ is made on Activity, WBS and Project level.

IMPLEMENTED FIELDS

The following fields are implemented in ScheduleReader™:

Cost: Accounting Variance, Budget At Completion (BAC), Cost Performance Index, Cost Variance, Cost Variance Index, Earned Value Cost, Estimate at Completion Cost, Estimate To Complete, Planned Value Cost, Schedule Performance Index, Schedule Variance, Schedule Variance Index, To Complete Performance Index, Variance At Completion.

Labor: Accounting Variance – Labor Units, Budget At Completion (BAC) - Labor Units, Cost Performance Index - Labor Units, Cost Variance - Labor Units, Cost Variance Index - Labor Units, Earned Value Labor Units, Estimate at Completion - Labor Units, Estimate To Complete Labor Units, Planned Value Labor Units, Schedule Performance Index - Labor Units, Schedule Variance - Labor Units, Schedule Variance Index - Labor Units, Variance At Completion - Labor Units.

VIEW EVA PARAMETERS

The following steps are our recommendation for viewing the values calculated with the EVA:

1. Open the **project plan** that should be analyzed.
2. Import the **baseline** for the opened project plan.
3. Create a different **layout** for costs and units:
    1. Cost Variance Layout - Cost Variance, Cost Variance Index, Cost Variance - Labor Units, Cost Variance Index - Labor Units.
    2. Performance index - Cost Performance Index, Cost Performance Index - Labor Units, Schedule Performance Index, Schedule Performance Index - Labor Units, Planned Value Labor Units, Earned Value Labor Units.

Note: You will have to import the project baseline in order the EVA parameters to be calculated

Note: Default P6 settings are used for calculating the Earned Value parameters:

- “ETC=PF*(Budget at Completion – Earned Value), where PF=1” – is the technique that is used for calculating Estimate to Complete (ETC);
- “Planned values with planned dates” – is the P6 option used for calculating earned values from the assigned baseline.

Progress Update

OVERVIEW

Different roles are working and collaborating on the project plan: architects, engineers, civil engineers, construction workers, etc. Inserting the right information for the status of each activity will help the project manager, investor to have the real picture for the project's status and how the project progresses.

Users can insert proposal for updates in the following views:

- Activities;
- Assignments.

When entering in "Progress update" mode in one of the mentioned views, several columns from that particular view will be available for updating. These fields are:

- For Activities: Activity % Complete, Physical % Complete, Units % Complete, Actual Start, Actual Finish, Activity Status, Remaining Duration, Activity Codes and User Defined Fields (UDF).
- For Assignments: % Units Complete, Actual Cost, Actual This Period Units, Actual Start, Actual Finish, Remaining Units and Remaining Units/Time.

Which fields will be available for inserting updated depends on the working habits and the workflows that exist in the company. Usually, the project scheduler defines which fields will be available for updates.

Note: For updating the "Actual This Period Units" field, the activity status must be "In Progress".

The proposals for the updated activities or assignments are saved in a .xls file. This .xls file is placed in a newly created folder with the same name as the project plan and located in the same position as the XER file.

The updating flow in which project scheduler and team members take part is as follow:

1. Project scheduler prepares the project plan and exports it in XER file format
2. He makes a reflection of the project plan.
3. The project plan is distributed to the teams.
4. Each member inserts a proposal for updates and these updates are saved in the newly created .xls/.xlsx file.
5. The project scheduler imports the .xls/.xlsx file into the project's reflection.
6. In the merging process, the project schedule will have a detailed view of every changed parameter of each activity and can decide whether to accept or reject the updates.

In addition, for inserting proposals for updates, users are able to give proposals for inserting new activities in the project plan, a proposal for deleting existing ones or propose reassignment. All activities proposals can be seen directly on the Gantt Chart, in the Activity view.

Important Note 1: Before starting the updating process, make sure that the ScheduleReader™ and Primavera P6 have the same "Date Format" and "Duration Format" settings. You can set these parameters in the Options dialog.

Important Note 2: The system settings of PCs where ScheduleReader™ and Primavera P6 are installed should be the same.

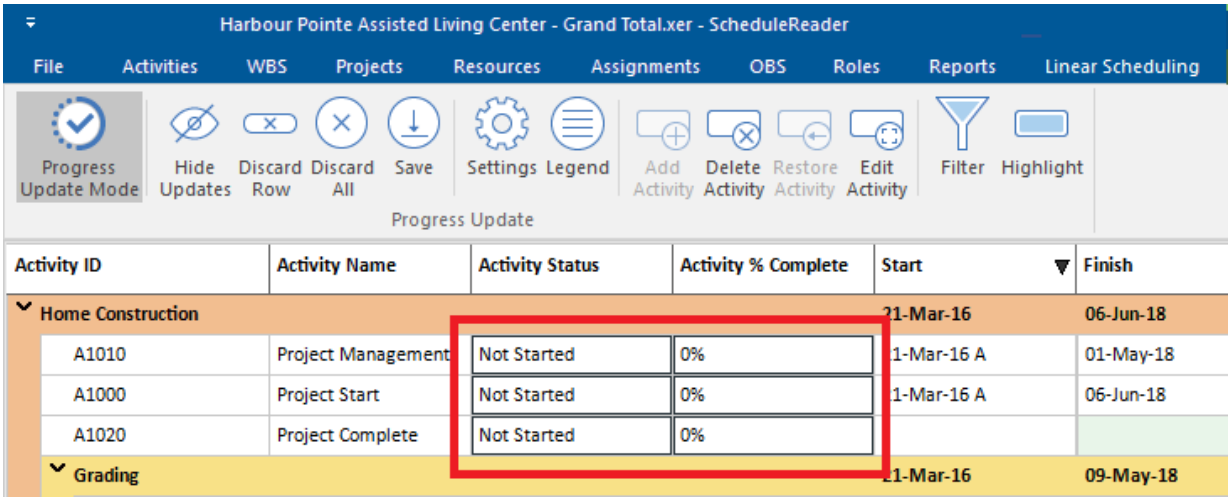
Important Note 3: When updating activities in a project that is part of a master project plan, .xls/.xlsx file will be created only for the project plan that contains that particular activity.

INSERTING PROGRESS UPDATE

Starting the "Progress Update" mode is very easy and requires three steps:

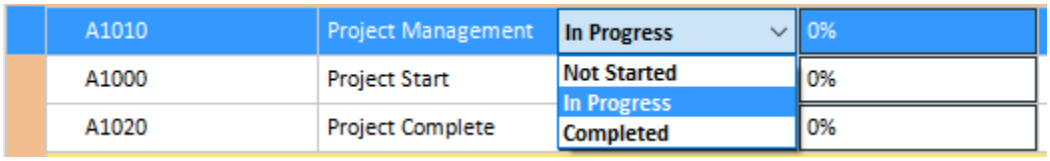
1. Open the project file (XER file) in which you want to insert a proposal for updates;
2. Select the **Activities** view;
3. In the **Progress Update ribbon**, click on the **Progress Update Mode**.

The Activity table will be slightly changed and you will see some of the fields are framed with a tiny black line, as it is presented in the image below. These are fields for updating.

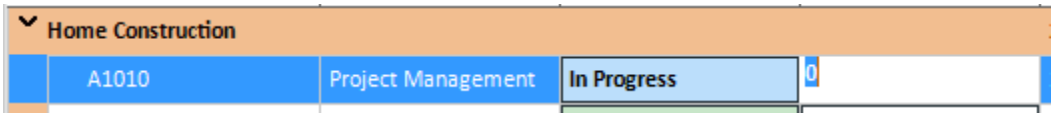


The next steps are for inserting the updates.

1. Double click on the **Activity Status** cell;
2. A drop-down list will be opened, as in the image below. Select "**In progress**" if you are working on the activity or "**Completed**" if the activity is finished.



3. Insert value in **Activity % Complete**.



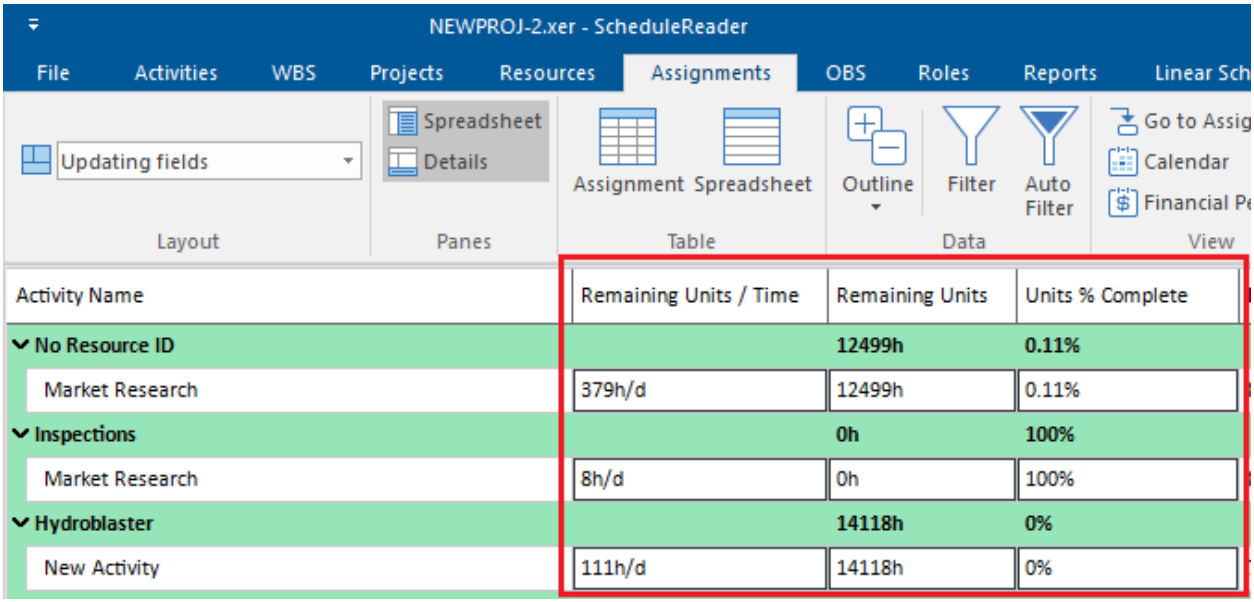
4. Save the updates.

PROGRESS UPDATES IN BOTTOM VIEW

Another option for updating the project assignments is by using the Bottom view in the Activity ribbon. The process is similar to the "ordinary" progress update:

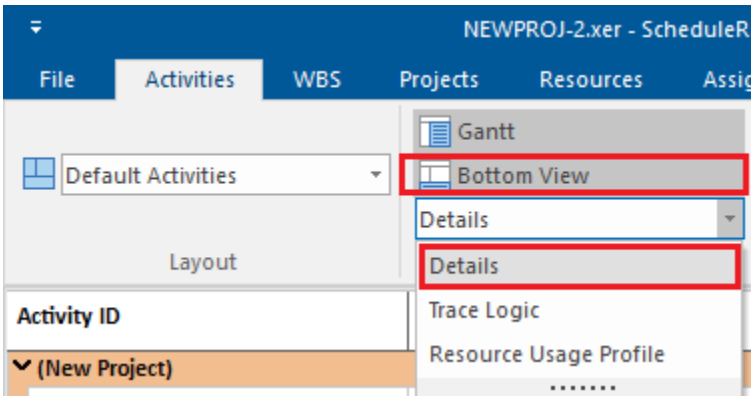
1. Open the project file (.xer file) in which you want to insert a proposal for updates;
2. Select the Activities view;
3. In the Progress Update ribbon, click on the Progress Update Mode.

Besides the Activity table, the Assignment table will be slightly changed and you will see some of the fields are framed with a tiny black line, as it is presented in the image below. These are fields for updating.

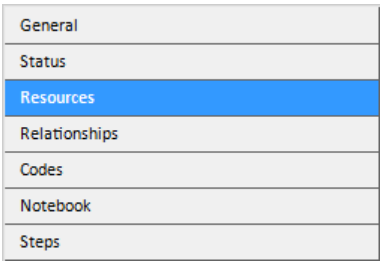


To update the fields that are available in the Assignment table, using the Bottom view in Activity view, perform the following steps:

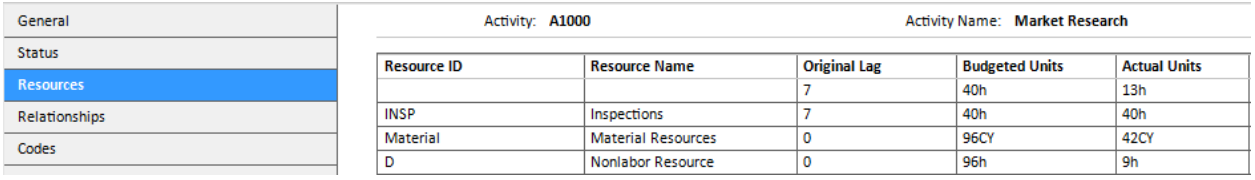
1. In the Bottom view drop-down menu, select the "Details" option;



2. Once the Details are applied in the bottom section, select one activity from the project plan and click on the "Resources" tab.

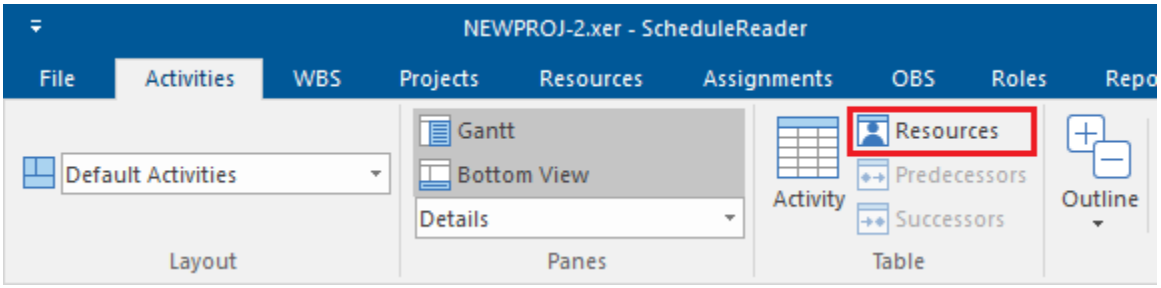


3. The look of the resource table is presented in the image below.

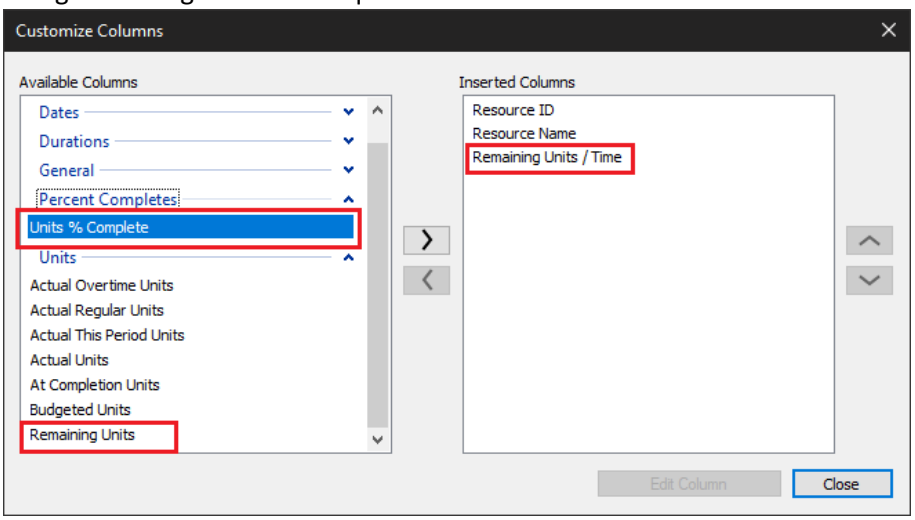


Resource ID	Resource Name	Original Lag	Budgeted Units	Actual Units
		7	40h	13h
INSP	Inspections	7	40h	40h
Material	Material Resources	0	96CY	42CY
D	Nonlabor Resource	0	96h	9h

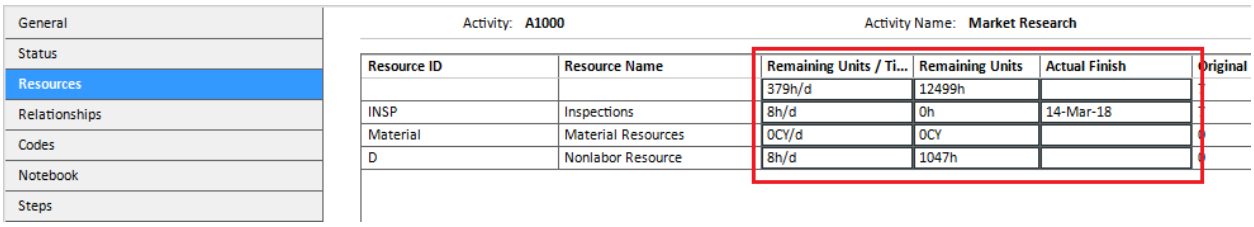
4. To insert the assignment fields in the resource table, like Remaining Units or Units % Complete, click on the "Resources" table in Activity ribbon.



5. Using the dialog insert the required fields in the table.



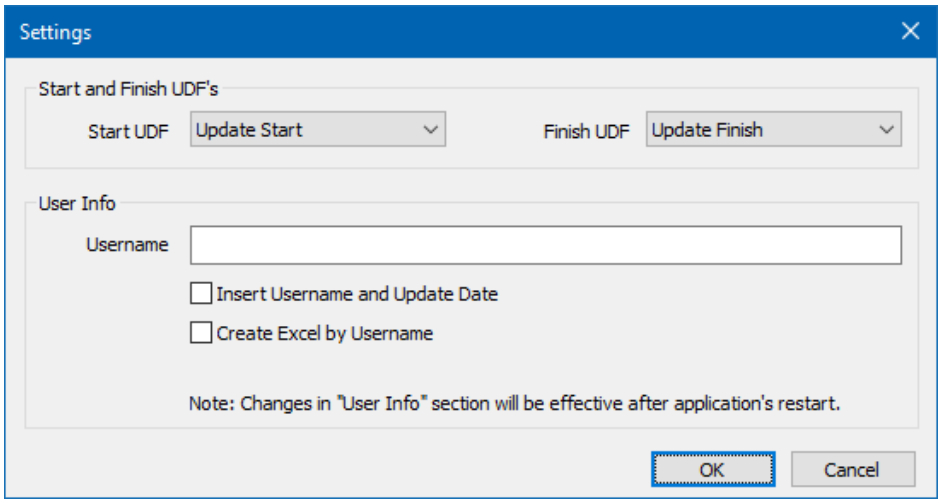
6. Insert the updated.



ADD ACTIVITY IN GANTT CHART

You can use this function if you want to inform your manager that additional effort is undertaken, that is planned with the ongoing version of the project plan. Several settings must be performed in order for the new activities to be visible in the Gantt Chart.

1. Open the  Settings dialog from the Progress Update ribbon;
2. In Start UDF and Finish UDF select the fields that will be used for the updating process.



Note: UDF (User-Defined Fields) are created by the project manager in Primavera P6 and inserted in the XER file. ScheduleReader users only use the fields for various tasks. You cannot create UDF in ScheduleReader.

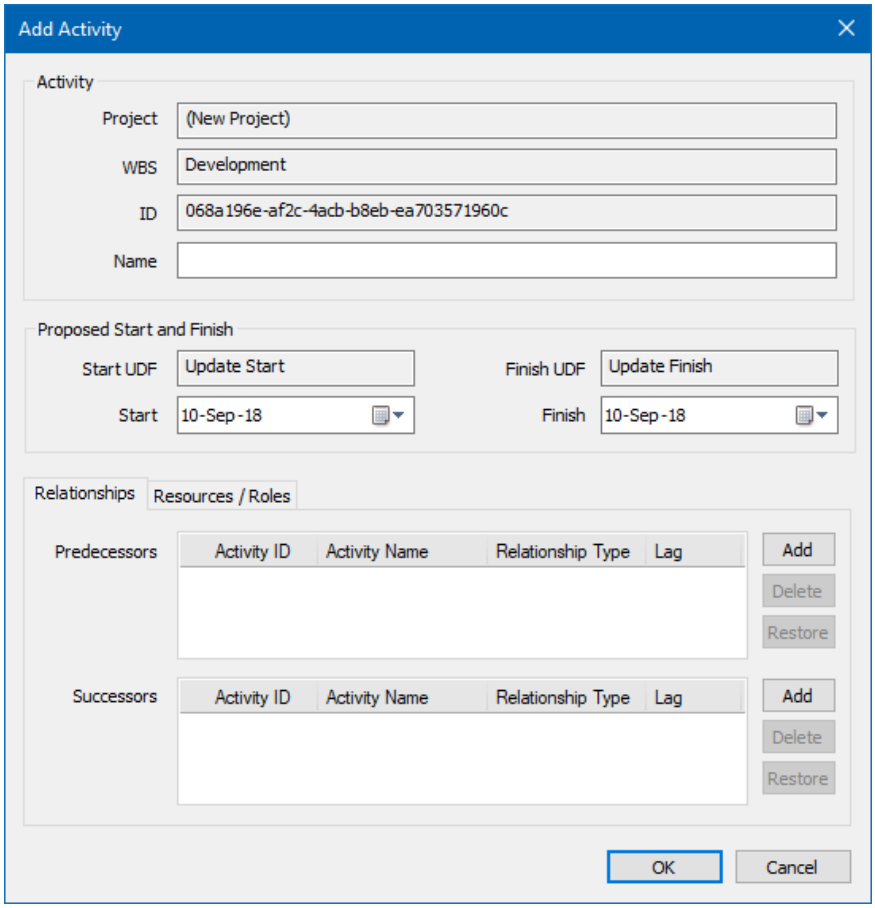
Note: **User info** section is mot obligatory for filling up and its main purpose is to give more detailed information about the updates: who inserted them and when:

- If the *Insert Username and Update Date* check-box is selected, then when any activity is updated, the Username and the Date & Time will be written in the Excel files that are used for data exchange between ScheduleReader and P6;
- If the *Create Excel by Username* check-box is selected, then an Excel file with the inserted user name will be created and will contain only the updates that particular user inserts. This option is useful when the project manager wants to receive separate updates from each person that he/she manages.

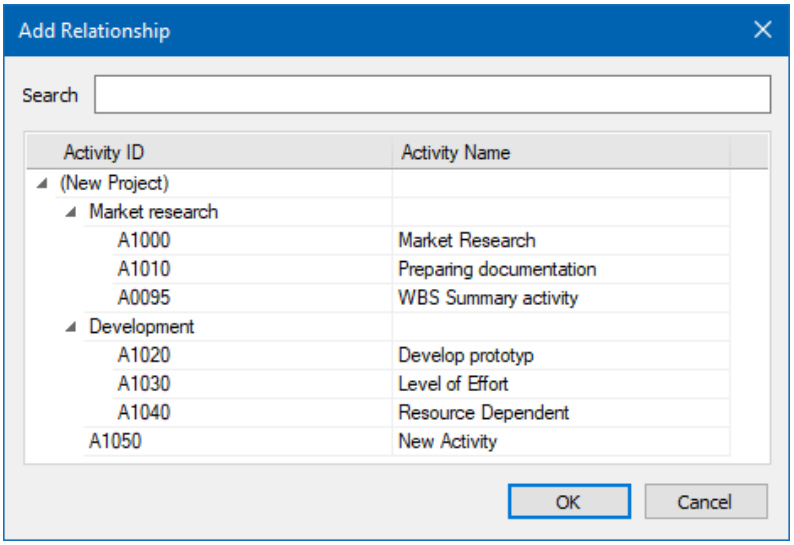
Note: After inserting data in the User Info section, close the project and restart the application.

To insert new activity, perform the following tasks:

1. Select the WBS in which the new activity will be placed.
2. Select the Add Activity feature in the Progress Update ribbon.
3. Insert the Name of the newly inserted activity.

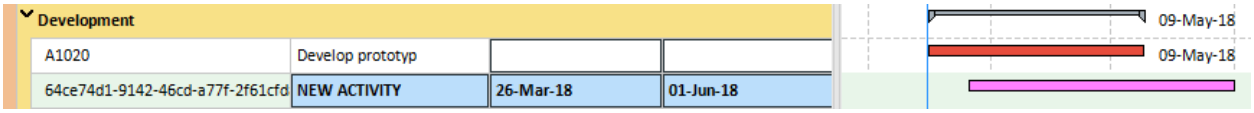


4. Define the Start and Finish dates of the activity.
5. If necessary, insert the activity's predecessor(s) and successor(s).



Once the inserting process is done, the row that contains the new activity will be painted **green**, while the new bar will be painted pink .

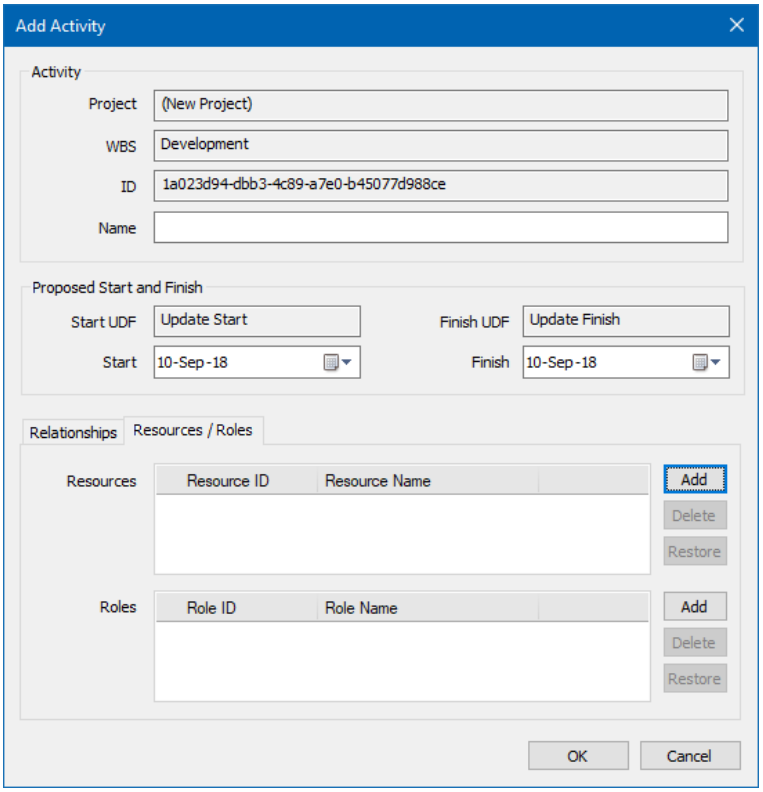
An example of inserting new activity is presented in the image below.



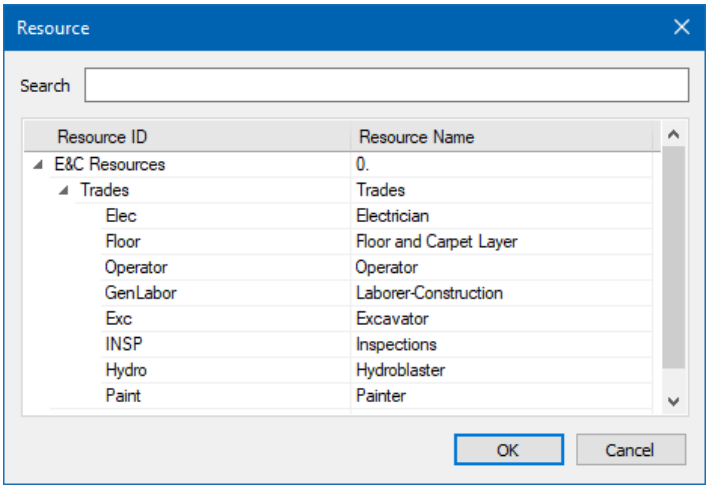
ASSIGN RESOURCES OR ROLES

Once the proposal for the new activity is inserted into the project plan, the user can give a proposal who can work on the newly created activity or which role can best perform the work. The process for inserting resource/role is as follow:

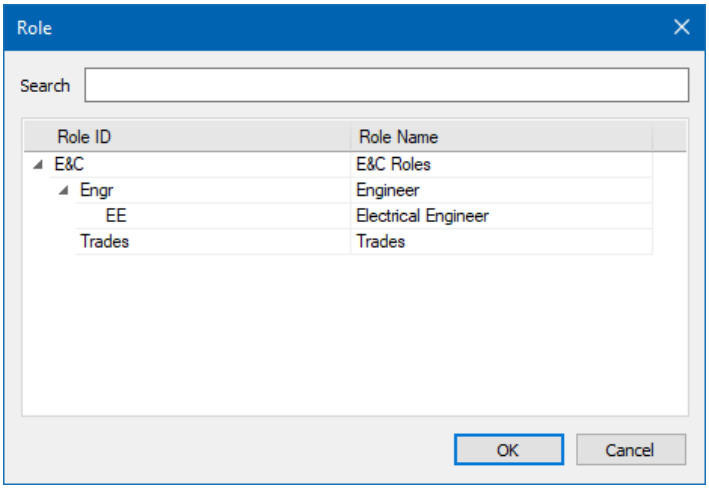
1. Select the activity that is added and click on the *Edit Activity* button in the Progress Update ribbon.
2. In the Add Activity dialog, select the Resource/Role tab.



3. For adding **resources** on the newly created activity, click on the “Add” button for Resources.



4. In the newly opened window, select the appropriate resource for the activity.
5. If you want to assign a **role**, perform the same action as for resources. Instead of resources, you will see the available roles.

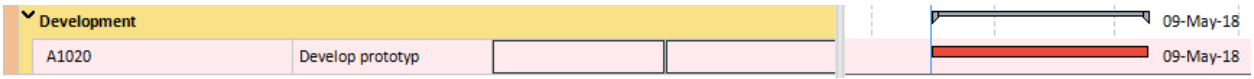


DELETE ACTIVITY FROM GANTT CHART

You can insert a proposal for deleting activity from the Gantt Chart. For that purpose, select the activity that should be deleted from the Gantt Chart and choose the Delete Activity functionality from the Task Update ribbon.

Once the deleting process is done, the row that contains the activity that should be deleted will be painted **red**.

An example of activity deleting from the project plan is presented in the image below.



FILTER, HIGHLIGHT AND LEGEND

Filter

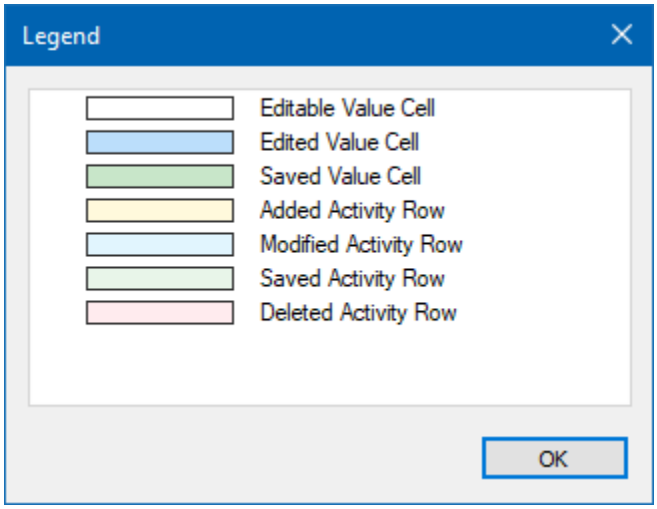
Viewing the updating activities and their parameters can be a very tricky process when the project contains several thousand activities. That is the main resource for implementing the filtering option. Selecting the “Filter” feature from the ribbon will show only those activities whose parameters have been modified.

Highlight

Highlighting functionality gives visual information of the updated activities. Each activity row in the table, depending on the undertaken action, is colored with different colors. See the “Legend” section for a detailed overview of the colors used in the updating process.

Legend

The legend dialog implemented in the Progress Update ribbon gives an explanation for the meaning of the row colors that are used in the activity table during the updating process. The colors that are used in the Progress Update mode are presented in the image below.



WHAT TO EXPECT WHEN WORKING WITH PROGRESS UPDATE

What to expect when updating Actual Start and Actual Finish

The Actual Start field shall always be enabled when working with Progress Update.

When you set the Actual Start, the Activity status "Not Started" is automatically changed to "In Progress" status.

When the activity status is "Completed", the Actual Start can only have a date value lower or equal as the date value for Actual Finish.

The Actual Finish field will always be enabled when working with Progress Update.

When you choose a date for the Actual Finish of the activity, the activity changes the "In Progress" status into "Completed" status.

When you update the Actual Finish date, the status of the activity from "Not Started" changes to "Completed".

What to expect when changing Activity Status

When you change the activity status from "Not Started" to "In Progress", the Actual Start inherits the value for the Start Date.

When you change the activity status from "Not Started" to "Completed", the Actual Start field inherits the value for the Start Date and the Actual Finish inherits the value from the Finish Date.

When you change the activity status from "Completed" to "In Progress", the value for the Actual Finish is deleted.

When you change the activity status from "In Progress" to "Completed" the Actual Finish field inherits the same date as the Finish date.

What to expect when updating Remaining Duration or % Complete

When it comes to updating the Remaining Duration field, it cannot be changed for Completed Activities.

The Remaining Duration and % Complete values are not changed automatically when one of the previously mentioned fields are updated.

This is left to Primavera P6 because it only applies its own calculations for these fields when importing the XLS/XLSX files.

The % Complete field cannot be updated or changed for activities with status set as "Not Started" or "Completed".

If you want to manually change the values for the Remaining duration and the % Complete than you can only do it to one field.

Graphical Reports

Graphical Reports and Dashboards displays the project data using charts and graphics. Compared with the traditional, table-text spreadsheet design, these reports are much easier for understanding, making the business reporting process meaningful. Presented on one page, containing summary information about the project's status, graphical reports allow project managers, project stakeholders and sponsors to quickly receive the information status that is business-critical.

Accepting the *Graphical Reports and Dashboard* functionality as a working tool will improve your business reporting process and information exchange. Among the benefits that your company gains are:

- Suitability – project information is presented in a way that is understandable by every project participants and PMO can help bringing business decisions in a reasonable time, based on the presented information;
- Time-saving – All graphical reports are created with one click of the button. In addition, the user can create more complicated reports and then exported it to the other project participants or team members;
- Comparison Reports – Some graphical reports can compare two or more project parameters from the same category or present the changes for one project parameter through time;
- Less Effort – Usually creation of one report requires a specific role in the organization and can be time-consuming. Changing the report's components can be done quickly, by anyone and every report can be customized with less effort.

PREDEFINED REPORTS AND DASHBOARDS

ScheduleReader has predefined graphical reports that give overall information about the status of the project plan. These reports will help fewer experienced users to create graphical reports and dashboards and present the status of particular project parameters in front of management.

Predefined reports are divided into two groups:

- DCMA 14 Schedule Analysis
  - DCMA 14 Schedule Analysis;
  - Activity Metrics;
  - Relationship Types;
  - Constraint Types.
- Activity Overview
  - Activity Steps;
  - Activity Status;
  - Activity Units;
- WBS Overview
  - WBS Cost;
  - WBS Duration;
  - WBS Units;
- Project Overview
  - Project Cost;

- Project Units;
- Project Duration.

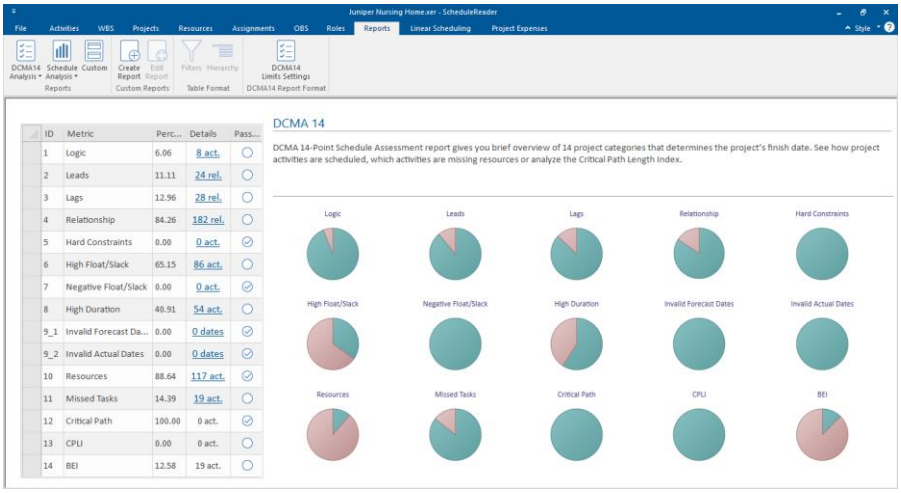
DCMA 14-Point Schedule Assessment

DCMA 14-Point Schedule Assessment report is a guideline created by The Defense Contract Management Agency (DCMA) in order for the Department Defense (DoD) to evaluate the number of schedules received from the defense suppliers. Through the years, DCMA 14-Point Schedule Assessment becomes a universal guideline for project scheduling and incorporated into various numbers of software.

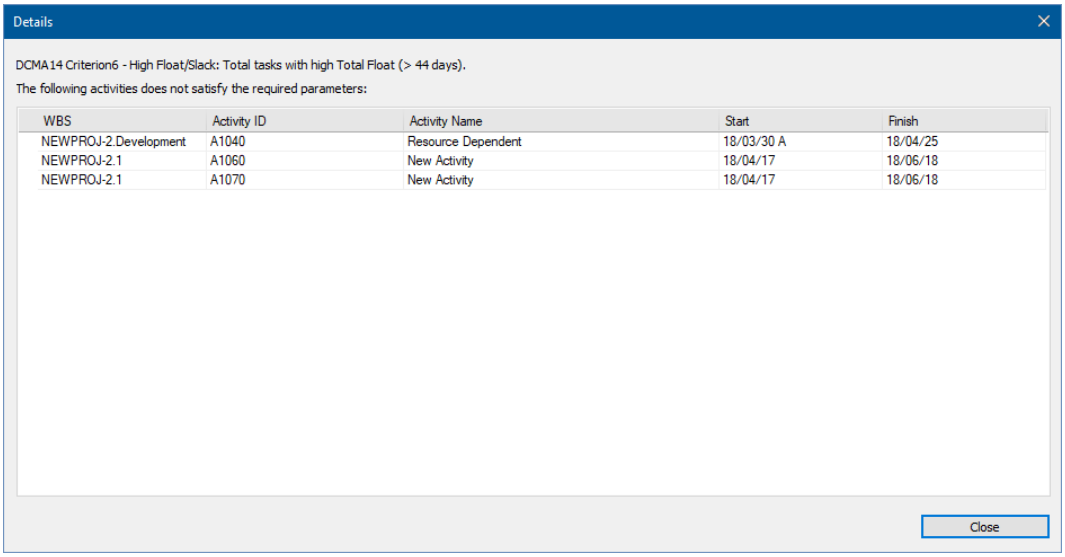
The following project's parameters are tested:

1. Logic – search the activities that are missing predecessors or successors;
2. Leads – search the activities that have relationships with lag duration less than 0;
3. Lags - search the activities that have relationships with a lag duration greater than 0;
4. Relationship Types – examines the relationships in the project. Majority of the relationships should be Finis-to-Start (FS);
5. Hard Constraints – examines the inserted constraint in the project plan. Hard constraints should be a minority in the project plan;
6. High Float – search for activities with a Total Float greater than 352 hours;
7. Negative Float – search for activities with a Total Float less than 0;
8. High Duration – search for activities that have Remaining Duration greater than 352 hours;
9. Invalid Dates – search for activities that have invalid actuals or remaining;
10. Resources – search for activities with duration of at least one day that don't have resources assign;
11. Missed Tasks – search for activities whose actual finish date is later than their earlier planned finish date;
12. Critical Path Test – on identified activity from critical chain grossly extend its remaining duration, and project completion date should be extended correspondently;
13. Critical Path Length Index (CPLI) – measures the ratio of the project critical path length plus the project total float to the project critical path length;
14. Baseline Execution Index (BEI) – calculates the ratio of all of the tasks that have been completed versus the tasks that 'should have been completed' in the period between the Baseline Schedule and the current schedule.

The look of the DCMA 14-Point Schedule Assessment report is presented in the image below.



The table within DCMA 14 report gives tabular information for each metric i.e. details and percentage of completeness and a graphical indicator whether the metrics are fulfilled or not. If the user clicks on the outcome in the "Details" column, presented as a hyperlink, a new window will pop up with detailed information for the activities that do not meet the specified requirement.



Note: Using the "Ctrl" + "C" functionality, you can copy the repot's details into MS Excel. Supported versions for this functionality are MS Excel 2010/2013/2016/2019.

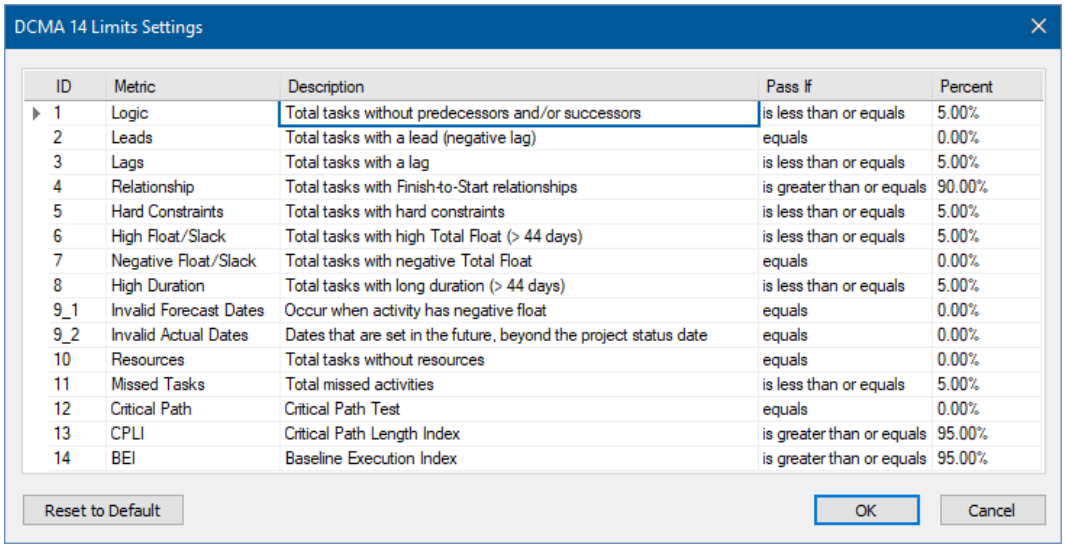
Dynamic criteria limits for DCMA 14-Point Schedule Assessment report

DCMA 14-Point Schedule Assessment report is created by predefined parameters. However, in some cases, ScheduleReader users will need to modify these settings and to insert their own, project-specific criteria. Thus, using the formatting functionality, they can change the criteria for all fourteen metrics, calculated in the report.

The following steps should be performed for changing the report's metrics:

1. Create the DCMA 14-Schedule Assessment report;
2. Select the DCMA 14 Limits Settings, located in the "Reports" ribbon.

3. From the “Pass If” columns for each metric, select the operator that will be used for validating the project data.
4. Define the value that will be used to determining whether the metric is fulfilled or not.



ID	Metric	Description	Pass If	Percent
1	Logic	Total tasks without predecessors and/or successors	is less than or equals	5.00%
2	Leads	Total tasks with a lead (negative lag)	equals	0.00%
3	Lags	Total tasks with a lag	is less than or equals	5.00%
4	Relationship	Total tasks with Finish-to-Start relationships	is greater than or equals	90.00%
5	Hard Constraints	Total tasks with hard constraints	is less than or equals	5.00%
6	High Float/Slack	Total tasks with high Total Float (> 44 days)	is less than or equals	5.00%
7	Negative Float/Slack	Total tasks with negative Total Float	equals	0.00%
8	High Duration	Total tasks with long duration (> 44 days)	is less than or equals	5.00%
9_1	Invalid Forecast Dates	Occur when activity has negative float	equals	0.00%
9_2	Invalid Actual Dates	Dates that are set in the future, beyond the project status date	equals	0.00%
10	Resources	Total tasks without resources	equals	0.00%
11	Missed Tasks	Total missed activities	is less than or equals	5.00%
12	Critical Path	Critical Path Test	equals	0.00%
13	CPLI	Critical Path Length Index	is greater than or equals	95.00%
14	BEI	Baseline Execution Index	is greater than or equals	95.00%

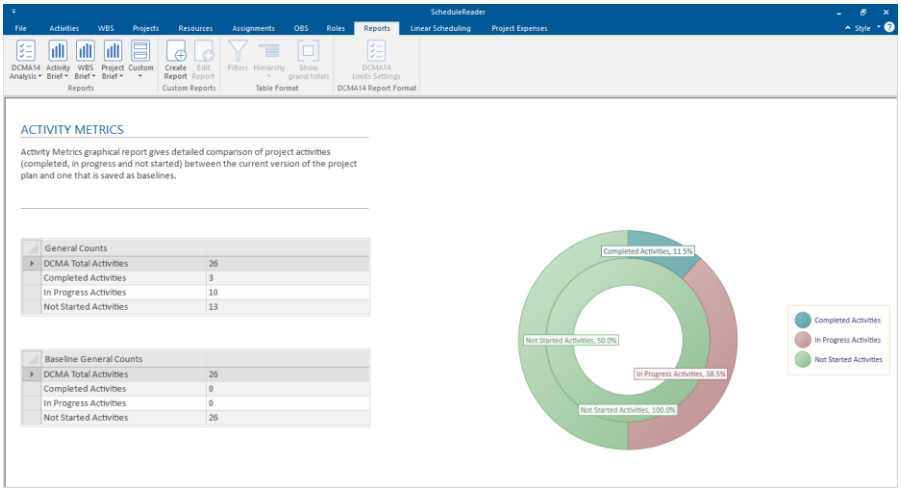
“Reset to Default” will bring the initial state of the report’s metrics.

Activity Metrics

Activity Metrics graphical report gives a detailed comparison between the current version of the project plan and one of the saved baselines. The activities status from the current project (completed, in progress and not started) are compared with the baseline version that is imported in ScheduleReader and the result is presented graphically, with the “Doughnut” chart.

This report type is very useful for the project participants because everyone can see how the project is progressing between two consecutive baselines.

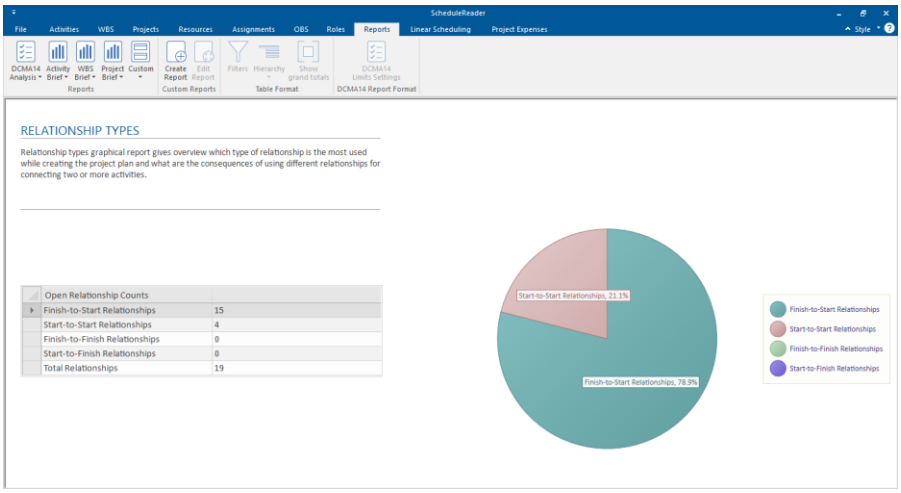
The look of the Activity Metrics graphical report is presented in the image below.



Relationship Types report

According to DCMA 14 Point Schedule Assessment, at least 90% of all total predecessors' relationship in the project plan should be Finish-to-Start relationship type. This graphical report gives project managers an overview of which type of relationship is the most used while creating the project plan and what are the consequences of using different relationships for connecting two or more activities.

The look of the Relationship Types report is presented in the image below.



Constraint Types report

Usually, the constraints are divided into two groups: Hard and Soft constraints. The difference between these two groups is about respecting the relationship logic. Hard constraints override the relationship logic that is inserted by the project scheduler and they will be not rescheduled according to the logic that exists in the project plan.

The following constraints are considered as Soft Constraints:

- As Late As Possible
- Start On
- Start On or Before
- Start On or After
- Finish On
- Finish On or Before
- Finish On or After

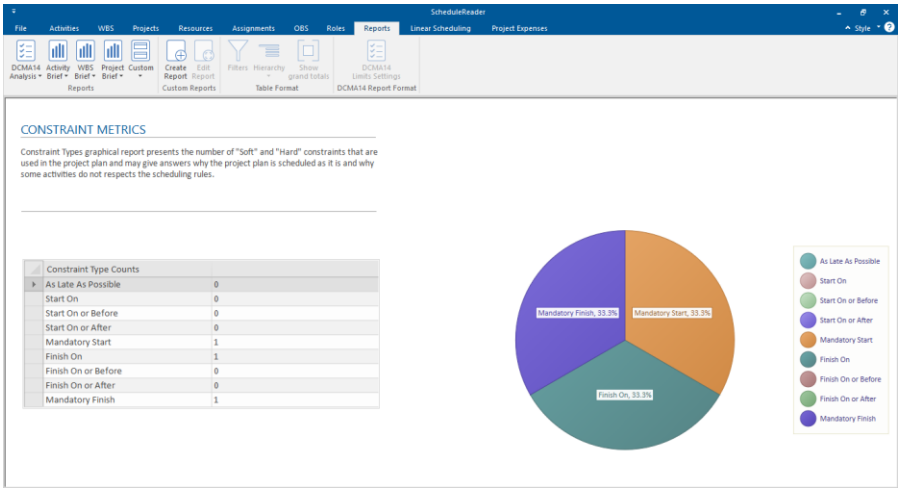
while

- Mandatory Start
- Mandatory Finish

are considered as Hard Constraints.

Constraint Types' graphical report may give answers to the project managers why the project plan is scheduled as it is and why some activities do not respects the scheduling rules.

The look of the Constraint Types graphical report is presented in the image below.



Activity Steps

Activity steps are used to divide the activity into smaller pieces of work (phases), without adding additional sub-tasks in the Gantt Chart. Usually, they are named after the phases that the activity is consisted of, informing the project viewer to be precisely informed about the activity stage.

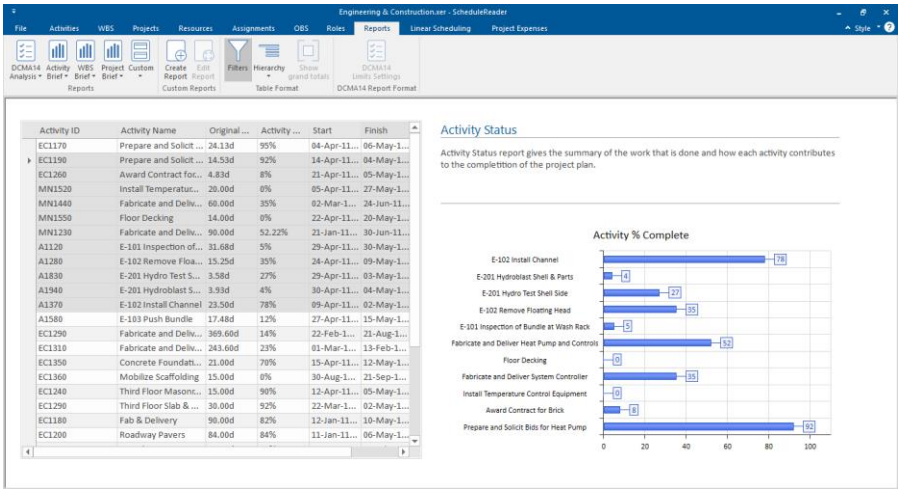
In the Activity Steps report, the user is able to view the status of the steps (not started, in progress or completed) that are assigned to the activities.

Activity Status

Activity status is probably the most used report in the application. As the name said, the user will be able to view the status for all activities in the project and their contribution to the completion of the project plan.

Users can use the “Filter” functionality for viewing specifying activity’s aspect, along with the activity status or present the project hierarchy in the status report.

The look of the Activity Status report is presented in the image below.

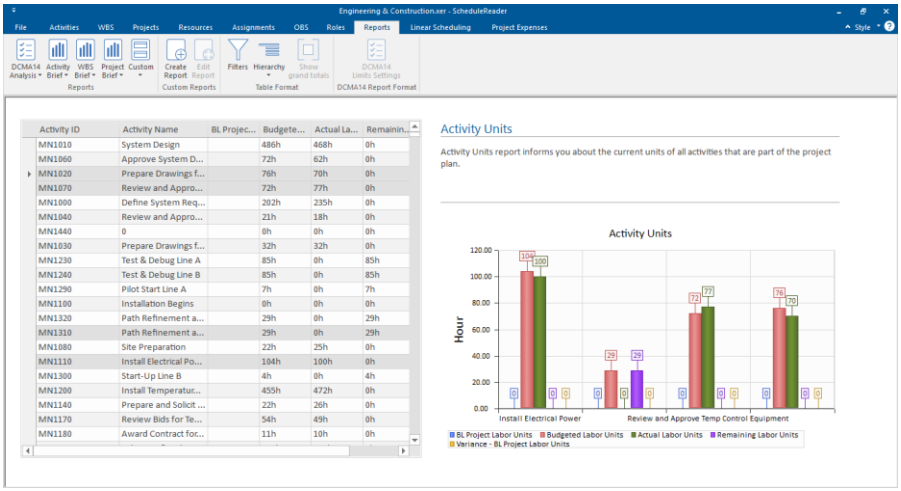


Activity Units

Activity Units report informs you about the current units of all activities that are part of the project plan. In the table, information for the budgeted, actual and remaining units, as well as baselines, project total units and unit variance.

Using the default filters or customized ones, users can observe activity units and analyze whether they are aligned according to the project budget or not.

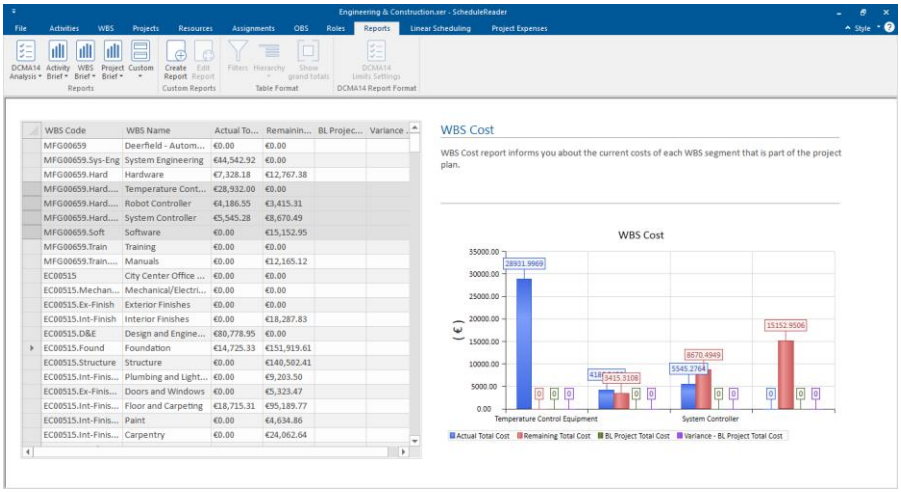
The look of the Activity Units report is presented in the image below.



WBS Costs

WBS Costs report informs you about the current costs of each WBS segment that is part of the project plan. The table part of the report gives information about the actual and remaining costs as well as baselines project total costs and costs variance. Presented values are on the WBS level.

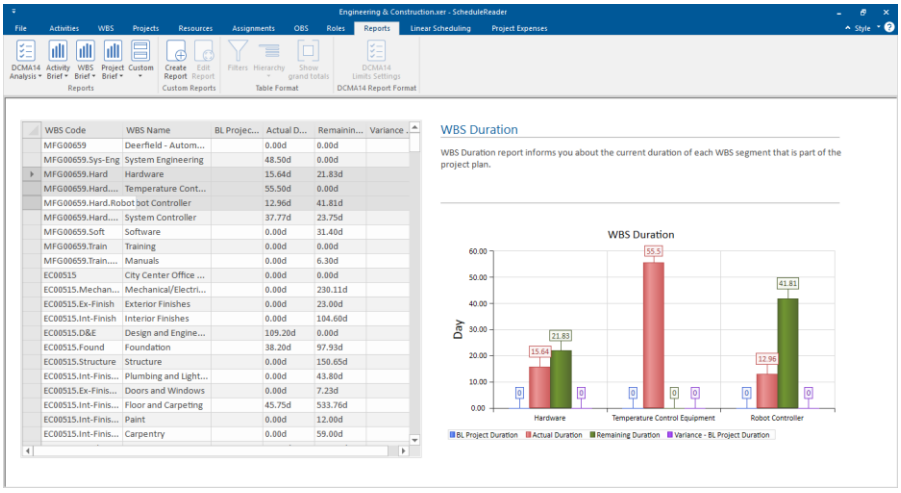
The look of the WBS Cost report is presented in the image below.



WBS Duration

WBS Duration report informs you about the current duration of each WBS segment that is part of the project plan. The table part of the report gives information about the actual and remaining duration as well as baselines project total duration and duration variance. Presented values are on the WBS level.

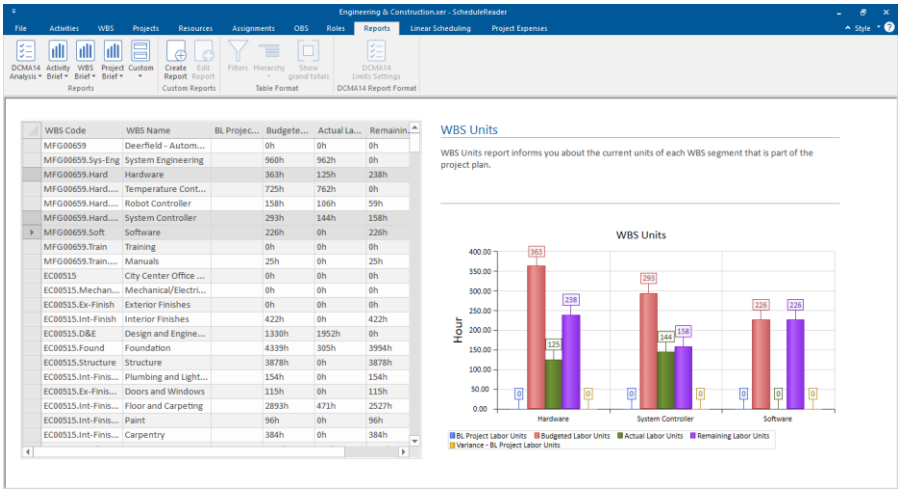
The look of the WBS Duration report is presented in the image below.



WBS Units

WBS Units report informs you about the current units of all WBSs' that are part of the project plan. In the table, information for the budgeted, actual and remaining units, as well as baselines, project total units and unit variance.

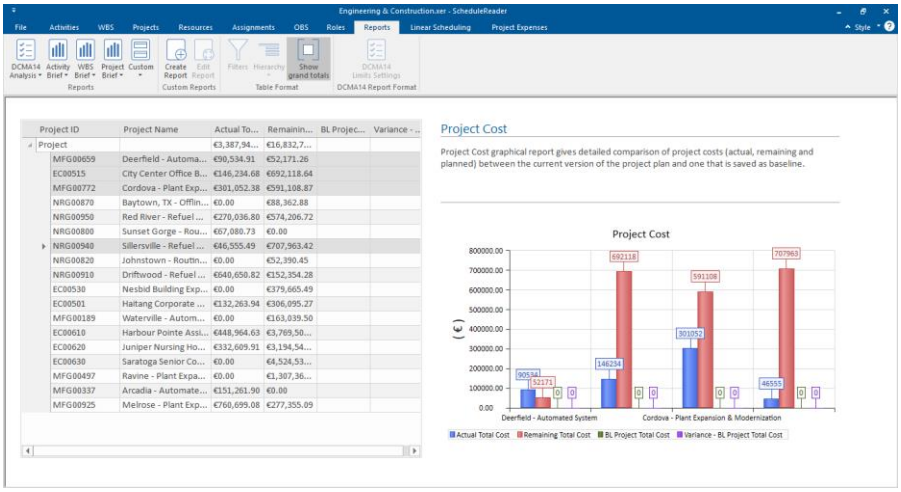
The look of the WBS Units report is presented in the image below.



Project Cost

Project Costs report informs you about the current costs of the project plan or in case of a master project, for each project that is exported in the XER file. The table part of the report gives information about the actual total and remaining total costs as well as baselines project total costs and costs variance. Presented values are on the project level.

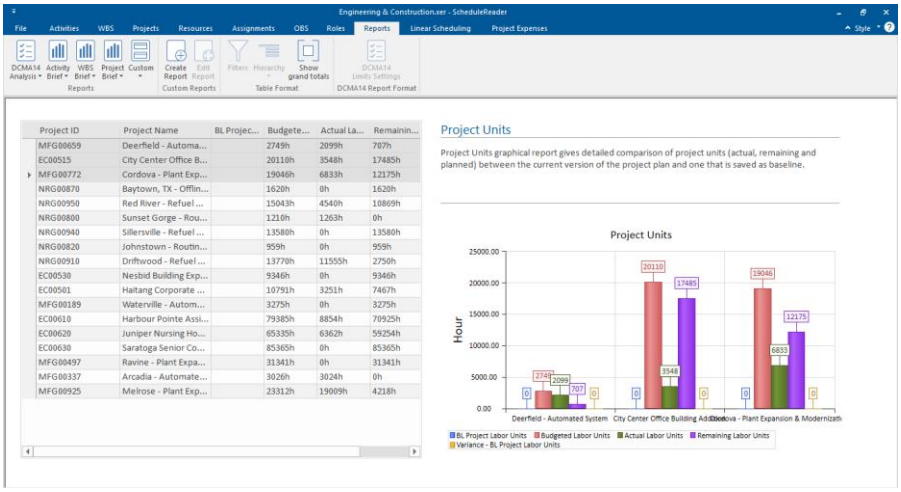
The look of the WBS Cost report is presented in the image below.



Project Units

Project Units report informs you about the current units of projects that are exported in the .xer file. In the table, information for the budgeted, actual and remaining units, as well as baselines, project total units and unit variance.

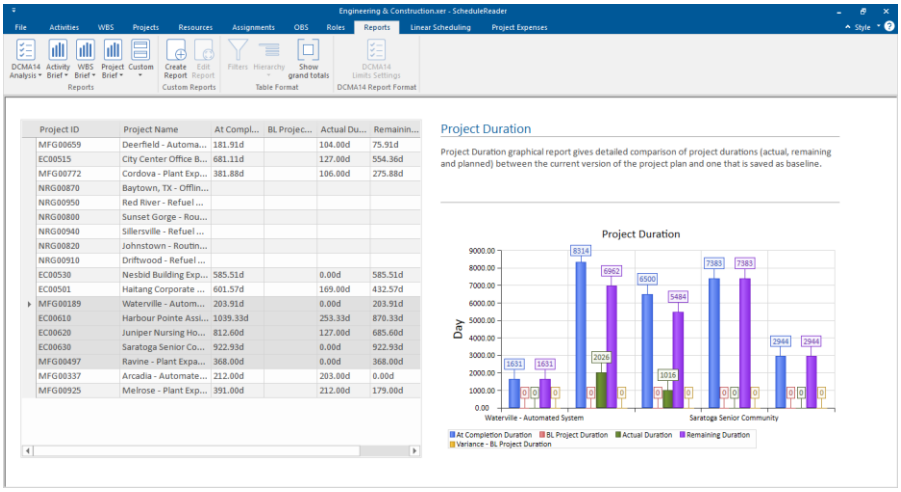
The look of the Project Units report is presented in the image below.



Project Duration

Project Duration report informs you about the current duration of each WBS segment that is part of the project plan. The table part of the report gives information about the actual and remaining duration as well as baselines project total duration, at completion duration and duration variance. Presented values are on the project level.

The look of the Project Duration report is presented in the image below.



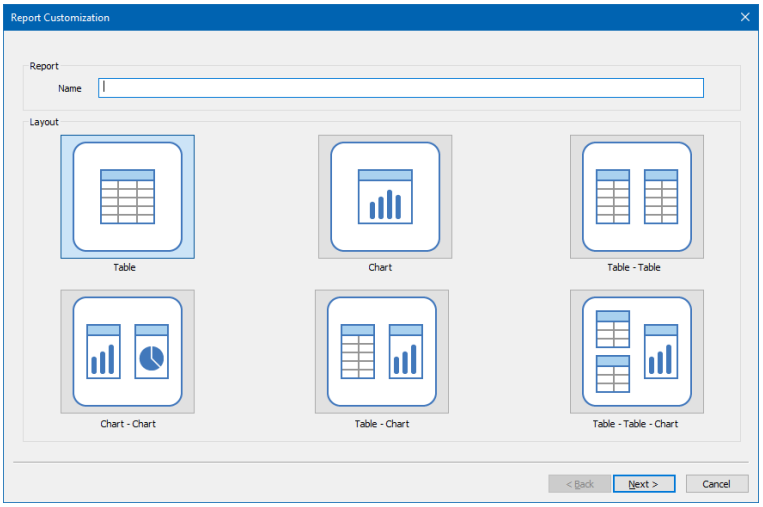
CREATE CUSTOM GRAPHICAL REPORTS

Predefined graphical reports give a brief overview of the different aspects of the project plan and sometimes they do not satisfy user's needs. In that case, the user can create their own, custom reports that will fulfill their requirements.

Create a custom report

Creation of customized report in ScheduleReader can be done in several steps:

1. Click on the Create Report feature, within Reports ribbon;
2. Name the new report;
3. Select the layout that is most appropriate for you;



4. Customize the table(s)/charts.

The first three steps are in common for any type of report. Whether the user will customize the table, chart or both will depend on the selected layout.

Table layout

Table layout will create a report that is consists of only one table. User should perform the following steps:

1. Choose the columns from the “Available Columns” table the will be presented in the report;
2. With  and  buttons arrange the order of the columns in the table;
3. If necessary, apply some of the available filters;
4. Select the “Hierarchy” type, if you like to see the project hierarchy in the table.
5. Click on the Finish layout.

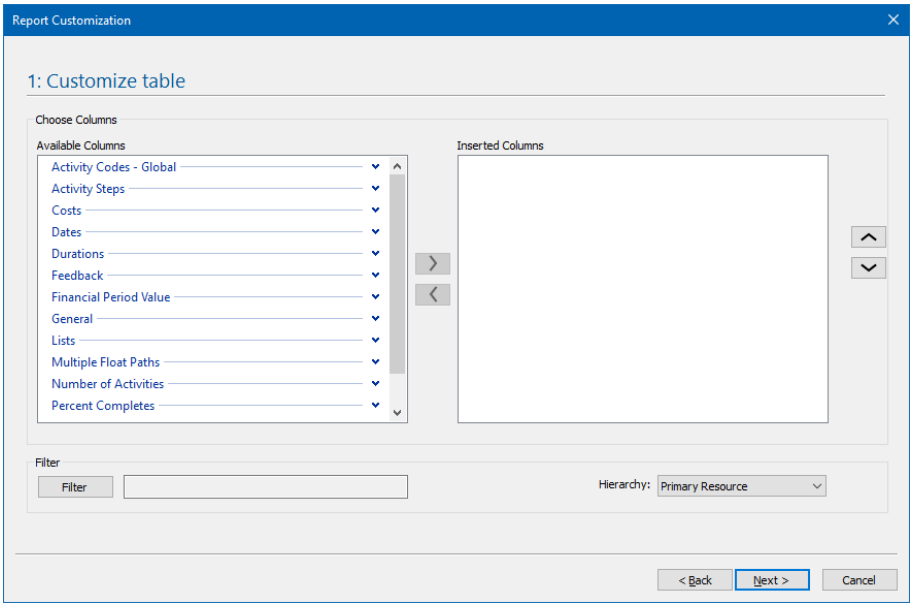


Chart layout

Chart layout will create a report that is consists of only one chart. User should perform the following steps:

1. Choose the columns from the “Available Columns” table the will be presented in the report;
2. With  and  buttons arrange the order of the columns in the table;
3. If necessary, apply some of the available filters;
4. From the “Chart category” drop-down list selects the chart type that will present graphically the selected columns values.
5. Click on the Finish layout.

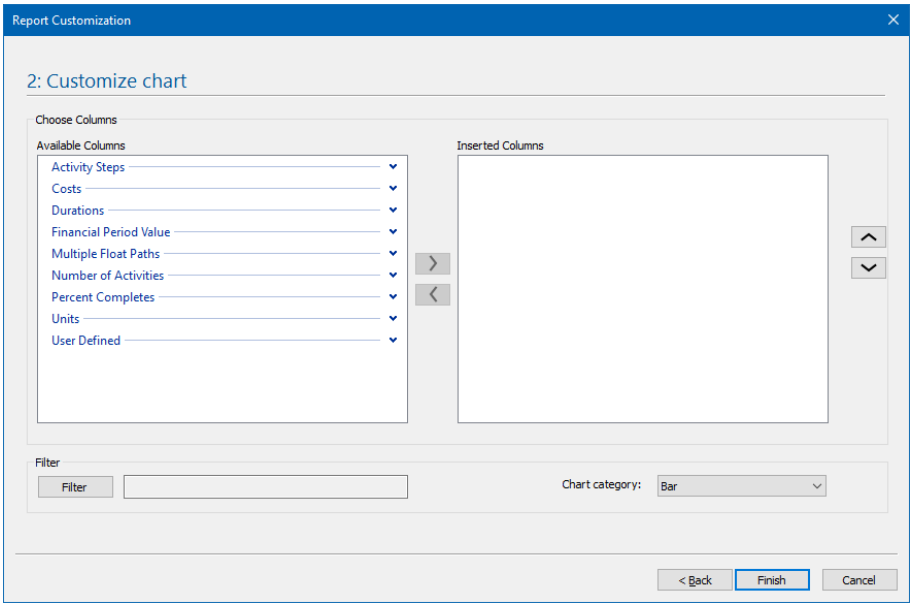


Table-Table layout

The table-table layout will create reports that contain two tables. Users must customize both tables in two different dialogs in order for the report to be created successfully. User should perform the following steps:

1. Choose the columns from the “Available Columns” table the will be presented in the report;
2. With  and  buttons arrange the order of the columns for the **First** table;
3. If necessary, apply some of the available filters;
4. Select the “Hierarchy” check-box if you like to see the project hierarchy in the **First** table.
5. Click on the Next button;
6. Repeat the steps from 1 to 4 for the **Second** table;
7. Click on the Finish layout.

Chart-Chart layout

Chart-Chart layout will create reports that contain two graphical charts. Users must customize both charts in two different dialogs in order for the report to be created successfully. User should perform the following steps:

1. Choose the columns from the “Available Columns” table the will be presented in the report;
2. With  and  buttons arrange the order of the columns in the table for the **First** chart;
3. If necessary, apply some of the available filters;
4. From the “Chart category” drop-down list select the chart type that will present graphically the selected columns values;
5. Click on the Next button;
6. Repeat the steps from 1 to 4 for the **Second** chart;
7. Click on the Finish layout.

Table-Chart layout

The Table-Chart layout will create a report that will contain a table and graphical chart. Two-step customization (table and chart) must be done in order for the graphical report to be successfully created. This layout will be the most used one while creating reports in ScheduleReader.

User should perform the following steps for creating a table-chart report:

1. Choose the columns from the “Available Columns” table the will be presented in the report;
2. With  and  buttons arrange the order of the columns for the in the **table**;
3. If necessary, apply some of the available filters;
4. Select the “Hierarchy” check-box if you like to see the project hierarchy in the **table**.
5. Click on the *Next* button;
6. Choose the columns from the “Available Columns” table the will be presented in the report;
7. With  and  buttons arrange the order of the columns in the table for the **chart**;
8. If necessary, apply some of the available filters;
9. From the “Chart category” drop-down list select the chart type that will present graphically the selected columns values;

10. Click on the Finish button;

Table-Table-Chart layout

The last layout, but not least is the table-table-chart type of layout. It contains three main elements: two tables and one chart. It is a very useful chart because each of these elements can contain different information from the project plan. A very useful chart for presenting project plan parameters in one chart.

User should perform the following steps for creating a table-table-chart report:

1. Choose the columns from the “Available Columns” table the will be presented in the report;
2. With  and  buttons arrange the order of the columns for the in the **first table**;
3. If necessary, apply some of the available filters;
4. Select the “Hierarchy” check-box if you like to see the project hierarchy in the **first table**.
5. Click on the *Next* button;
6. Choose the columns from the “Available Columns” table the will be presented in the report;
7. With  and  buttons arrange the order of the columns for the in the **second table**;
8. If necessary, apply some of the available filters;
9. Select the “Hierarchy” check-box if you like to see the project hierarchy in the **second table**.
10. Choose the columns from the “Available Columns” table the will be presented in the report;
11. With  and  buttons arrange the order of the columns in the table for the **chart**;
12. If necessary, apply some of the available filters;
13. From the “Chart category” drop-down list select the chart type that will present graphically the selected columns values;
14. Click on the Finish button.

Edit custom report

After the user finishes with the creation of the graphical report, it is possible to modify some parts of the report. Using the *Edit Report* functionality, the user can change the inserted columns in the table/chart or change the chart type.

Steps for editing report are:

1. Select the report that will be modified;
2. Select the Edit report feature;
3. Choose the layout that you want to have in the modified report;
4. Depending on the selected layout modify the table content and the chart
5. Click on the Finish button.

Manage Reports

If the user-defined report meets the particular aspects of the project plan and gives the required information, the user can export the report’s parameters into a file and share it with the other team members. In case other project participants create reports that are suitable for some teams, these users will import the previously created report and work instantly.
There are several ways to manage reports in ScheduleReader™:

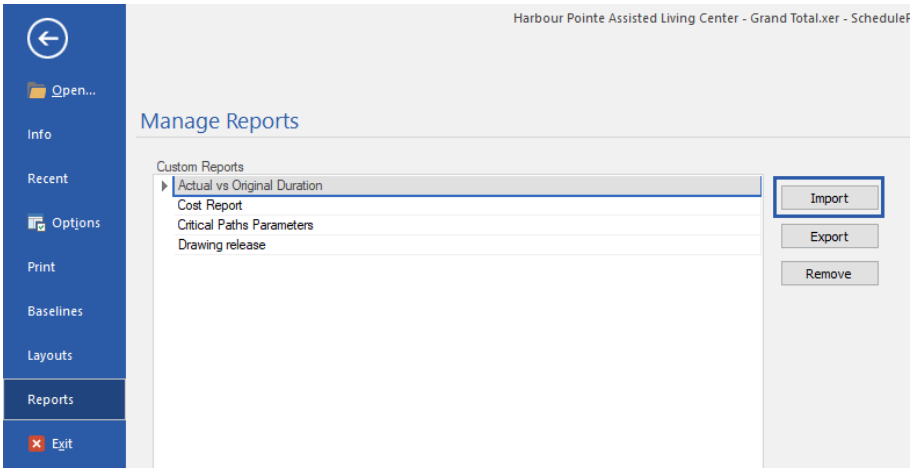
- Import report
- Export report
- Remove a Report

Import Custom reports

In ScheduleReader™ you can use custom made reports made by other project participants, by importing **.xml file** format, where all report's settings are saved.

To **import custom report** follow these steps:

1. From **File** Menu, click on the Reports Submenu**;**
2. Click on the **Import** Option.



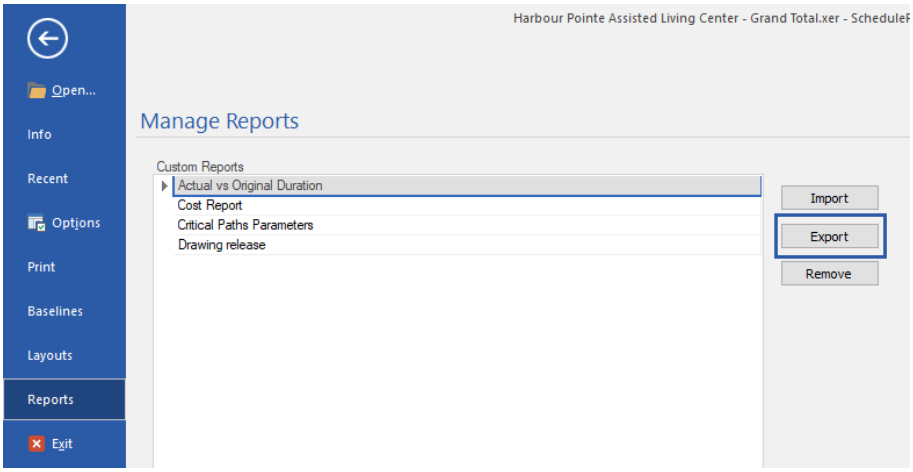
3. Choose an XML file from the desired location, that contains reports parameters.
4. Click on the **Open** button to import the report.

Export Custom report

In ScheduleReader™ you can export the reports that you have made, by saving the report's settings into .xml file format.

To **export** a custom report follow these steps:

1. From **File** Menu, click on the Layouts Submenu**;**
2. Click on the **Export** Option.



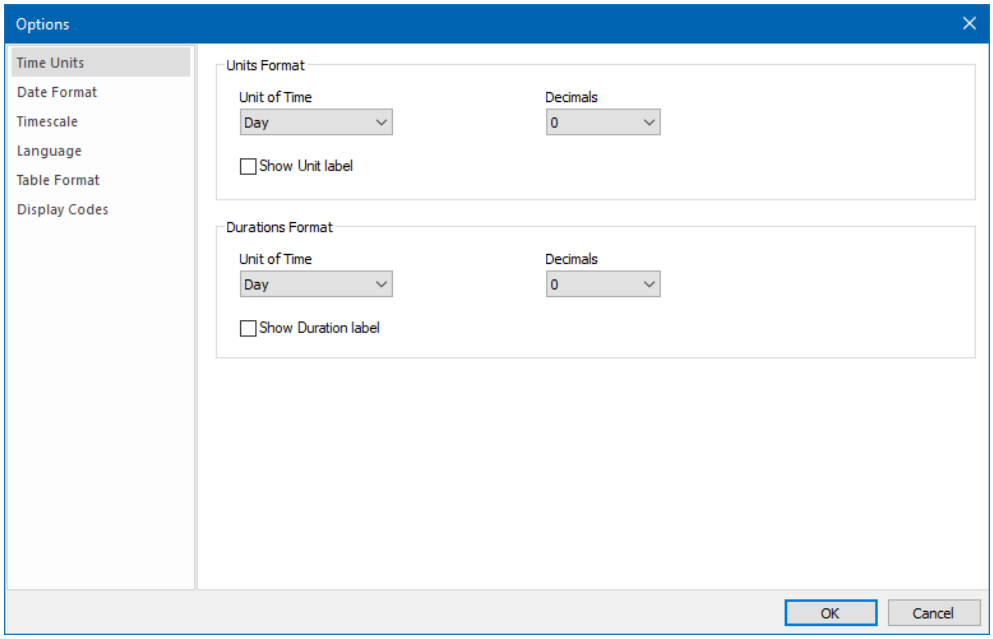
3. Choose the desired location where the file will be saved.

4. Click on the **Save** button to export the layout as an **XML** file.

User Preferences

OPTIONS

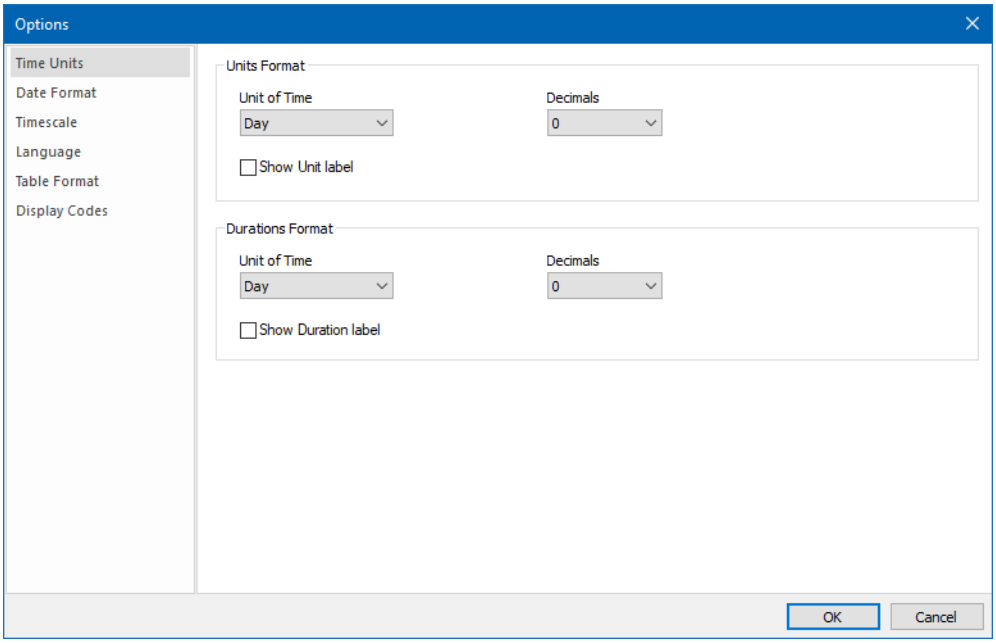
Use the Options dialog box to specify your **preferences,** which includes how to display time units, layouts, and gridlines. To **open Options** dialog box go to **File** and select **Options**. The following dialog will be shown on the screen:



Time Units

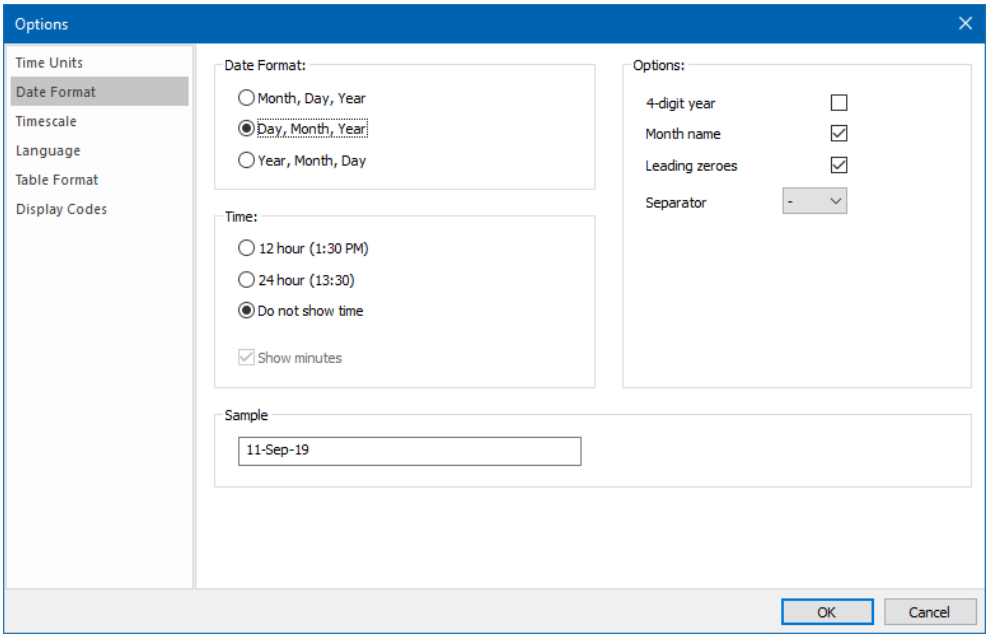
Time Units define a **unit of time,** hour, day, week, month or year, to display values in unit and duration fields. Define how many place values to be shown for a decimal number (0, 1, or 2). Choose to show a **duration label** right next to the value as shown in the image below.

Note: For .xls file this option is disabled. Time units are retrieved from the file because there is no information for the assigned calendar to be used to convert values.



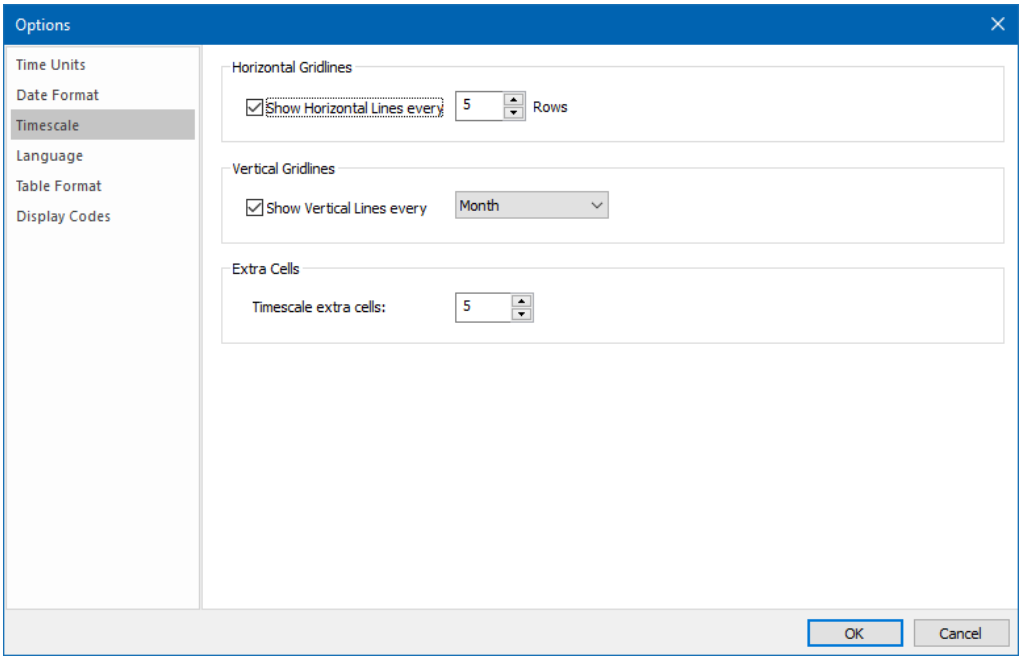
Date Formats

Under Date Format, you can select different options to define how the dates to be displayed in the application. Specify the order of days, months and years in dates, choose the time format and show minutes, etc.



Timescale

Gridlines define the period of time for vertical and horizontal **faint lines** to appear in the Gantt chart view.



Language

From the Language drop-down list, you can choose the language on which ScheduleReader will work. The following languages are available: German, French, Spanish, Russian and Chinese (Simplified).

The **encoding** standard helps the program determine how to represent the text (alphabetical characters, numbers, and other symbols). When you share XER files with people who work in other languages, or other computer systems, you may need to choose an encoding standard so when you open the file it would be readable.

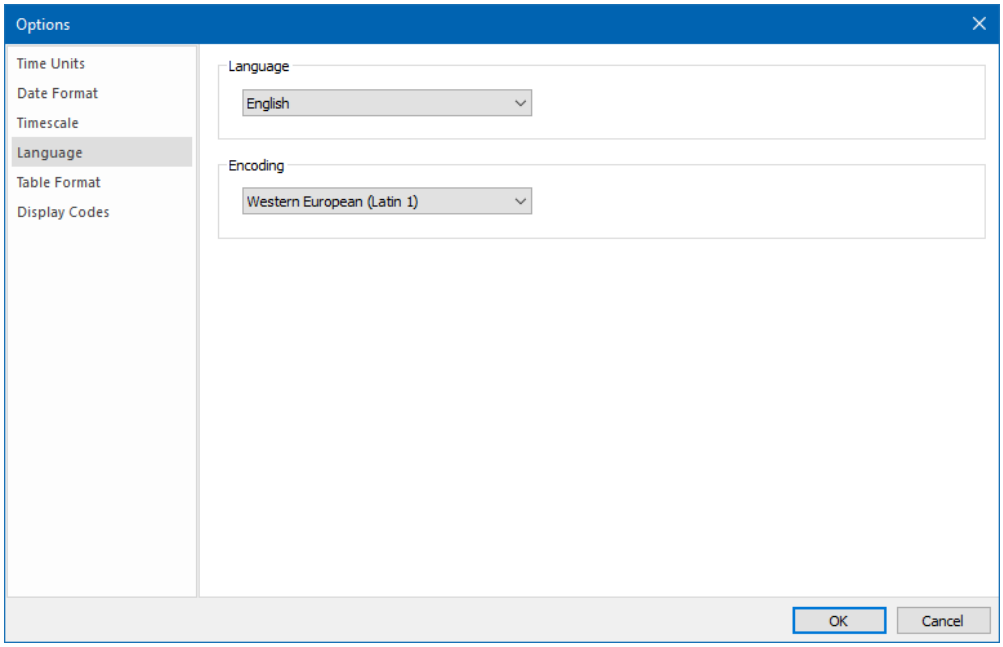
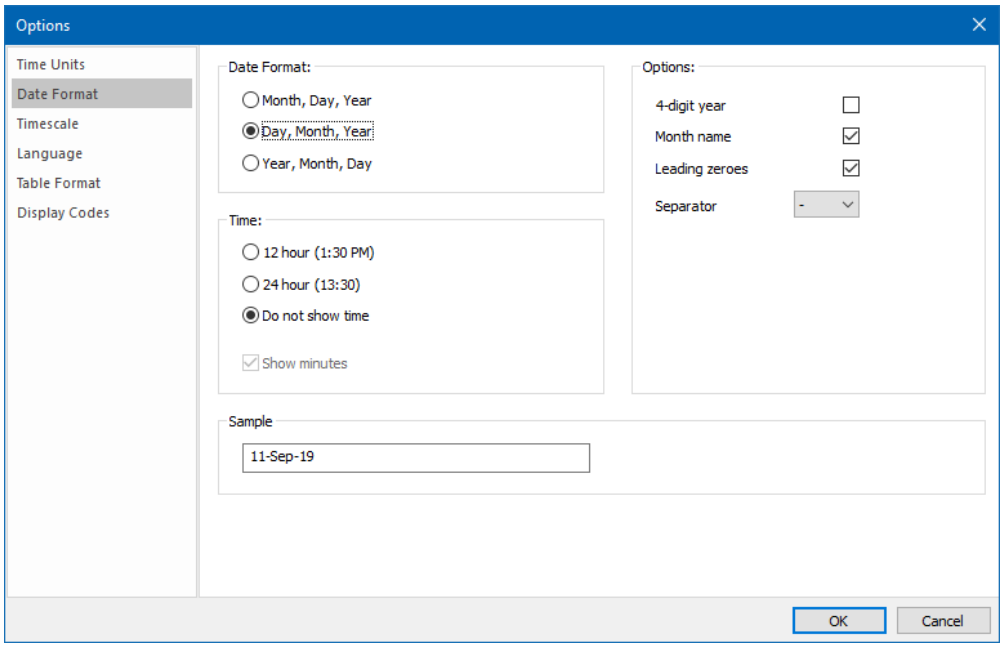


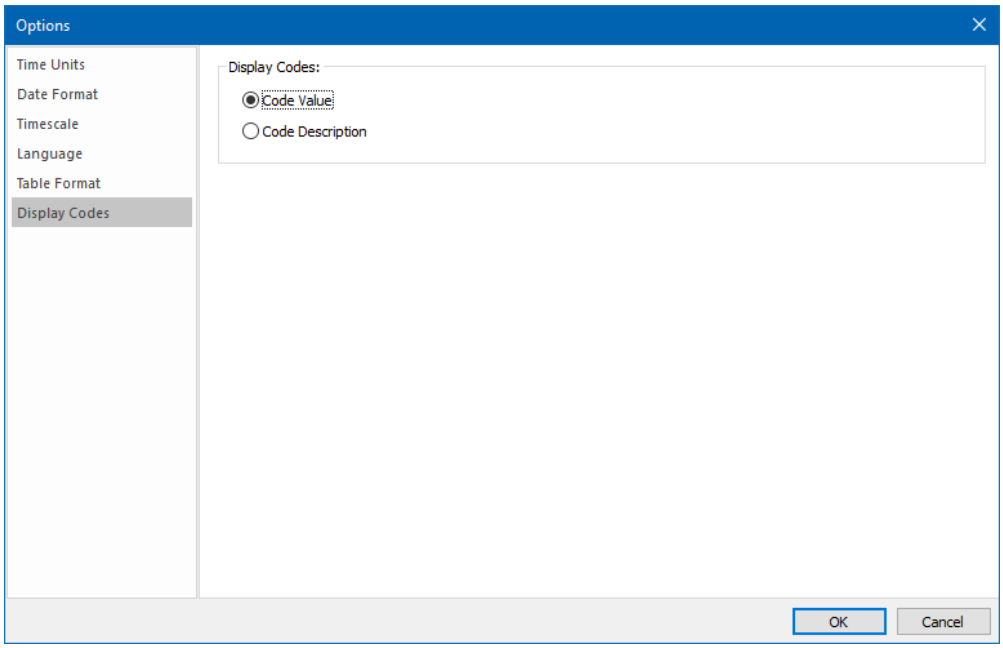
Table Format

Table format sub-menu allows you to format the row's height in application tables (view table and details table).



Display codes

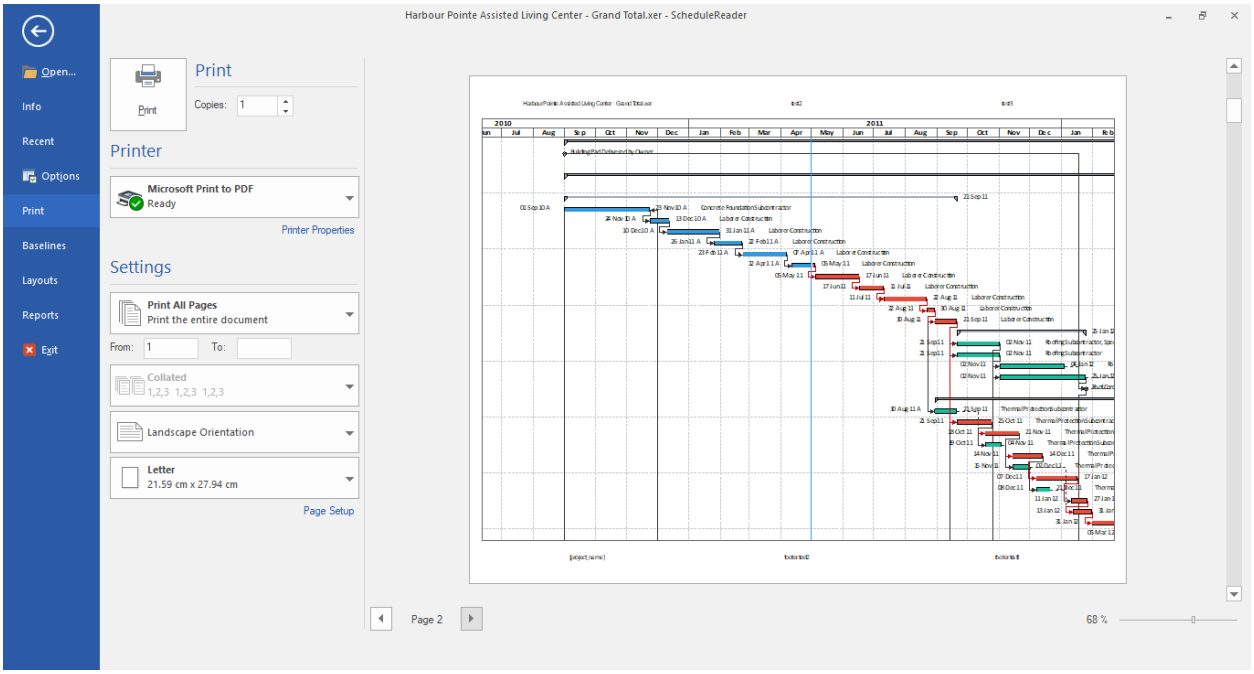
Display codes options allow you to choose whether the code values or code descriptions will be presented in view's table. It is applicable to all types of codes.



Print

PRINT PREVIEW

From *File* → *Print* open the **Print Preview** to see the print output of the current view. In this window, you can define pages, print settings and printer properties.



PAGE SETTINGS

Under **Settings,** you can specify which project pages to be printed out. You can select to print the **entire project**, the **current page** or **range of pages from/to**.

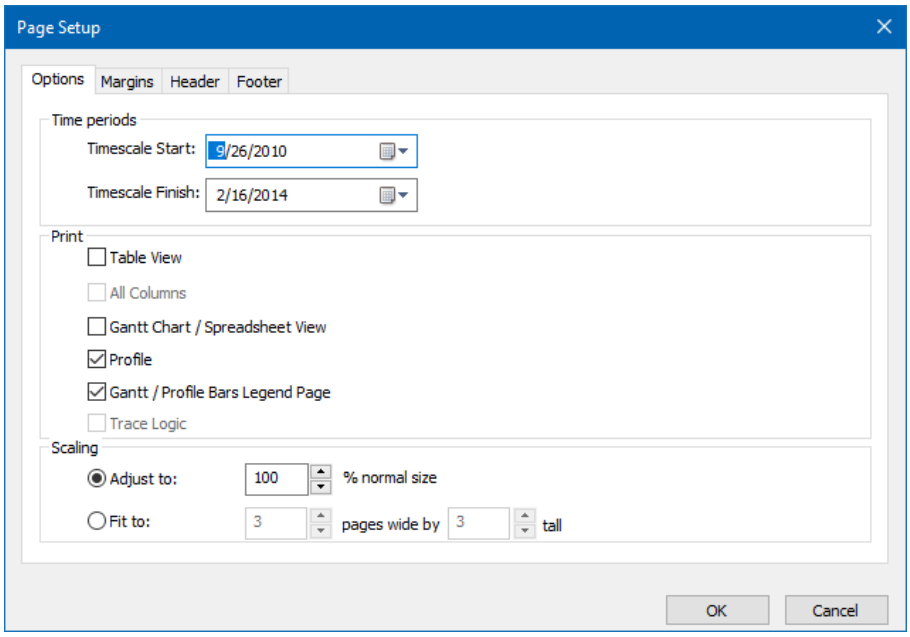
To sort your multiple copies select **collated** to print pages in order 1,2..1,2 or **uncollated** to print pages in order 1,1..2,2. Change the **page orientation** to portrait or landscape. Select a **page size** (A3, A4, A5, Letter, etc.) that best suits your needs.

PAGE SETUP

In the Page Setup dialog box, you can define time periods, scaling, margins, and page header and footer.

Once the "Time Periods" are set (Timescale Start and Timescale Finish), the values for the time-scale periods will be saved. Next time when the project plan is opened, these values will be loaded and the user can print the project plan without the need for inserting the time-periods once again.

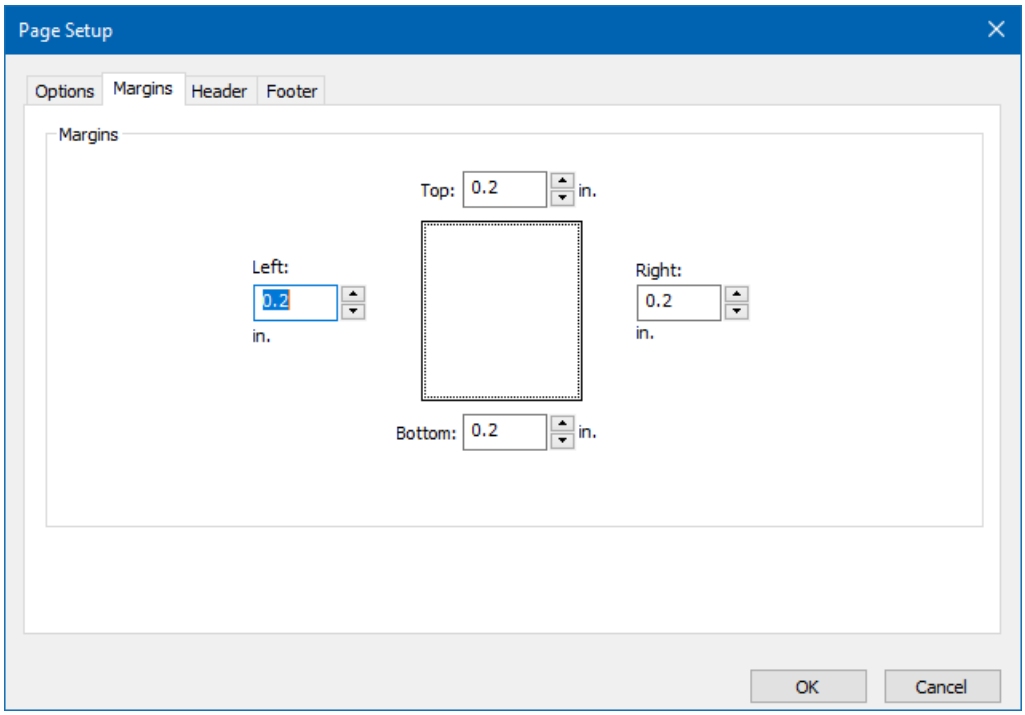
The other printing settings that is saved, after the fine tuning is performed, is the zoom functionality.



In the **Options** tab you can find the following settings for time periods, print view and scale:

Timescale Start	From the start date.
Timescale Finish	To end date.
Table View	Print only the visible columns in the active table view.
All Columns	All columns in the active table.
Gantt chart view/Spreadsheet view	Print only the Gantt chart or Spreadsheet for Resource Assignments.
Profile	Print only the Resource Usage Profile view, Activity Usage Profile view or Stacked Histogram, depending on the selected view.
Gantt/Profile Bars Legend Page	Print the Legend page for the Gantt Chart/Resource Usage Profile views
Trace Logic	Print the Trace Logic view
Adjust	Magnify or reduce a print by an exact percentage.
Fit to	Small pages up and large pages down to fit the paper.

In the **Margins** tab, define the empty space to be left from top, down, left and right in inches.

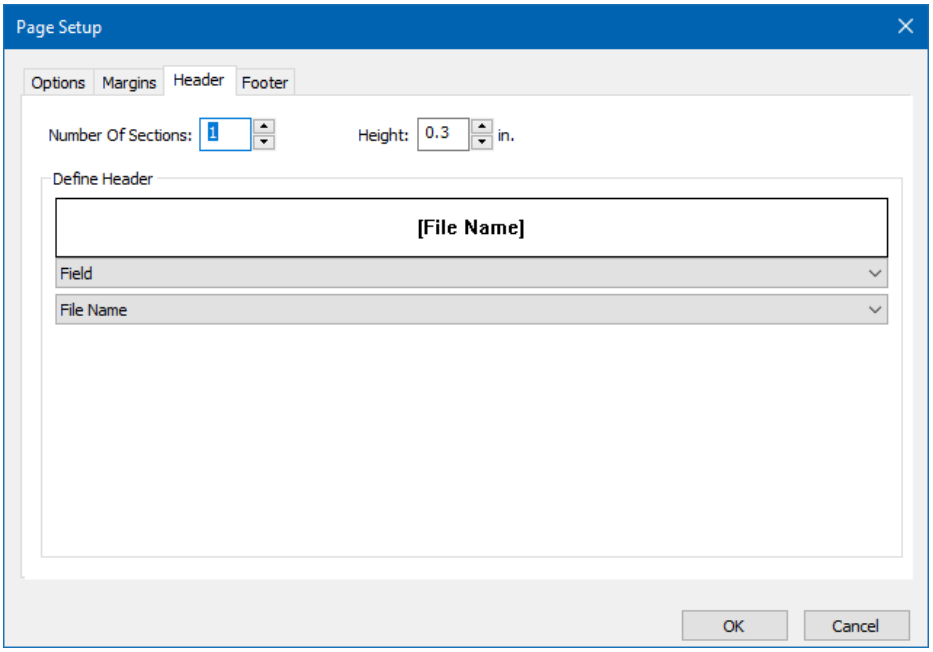


Under the **Header tab, you have the following options**:

- **Number of sections** – you can choose in how many sections or columns, the Header area will be divided
- **Height** – **the height of the Header row**
- **Type** of data – Text, Image or Field

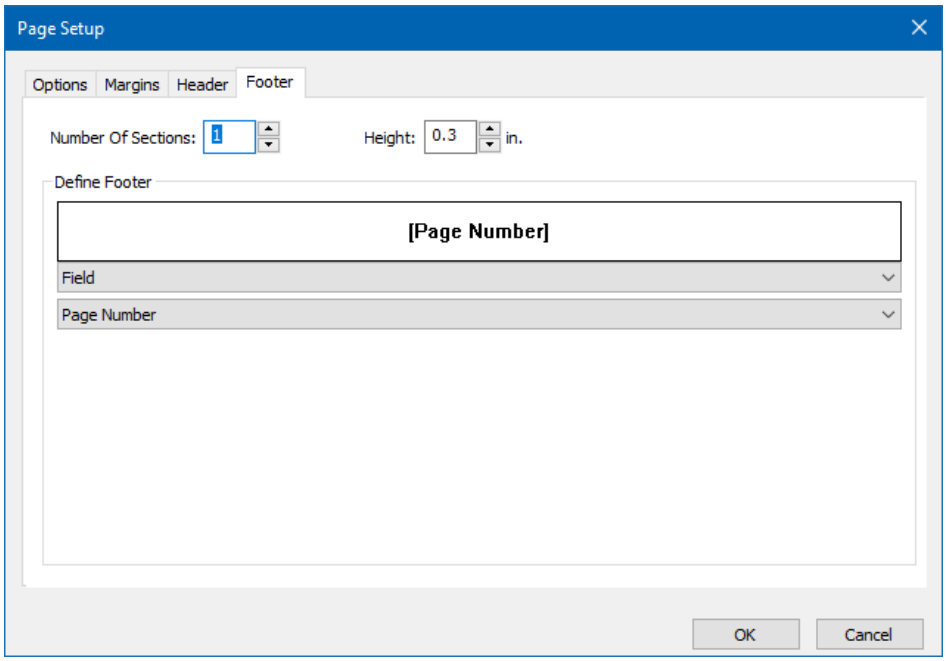
Supported Field data types:

Current Date	Page Number
Current Date Time	Project Finish
Current Month	Project ID
Current Week	Project Name
Date/Date	Project Start
File Name	



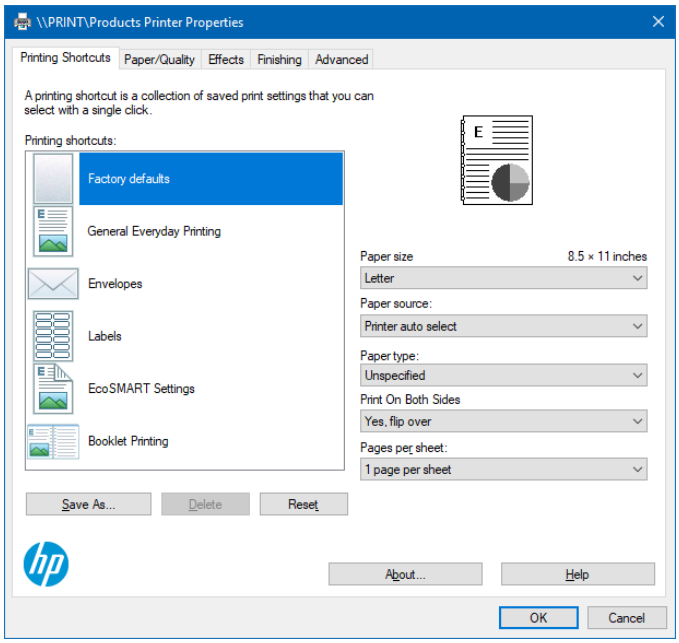
Under the **Footer tab, you can do the following options**:

- **Number of sections** – you can choose in how many sections or columns, the Header area will be divided
- **Height** – the height of the Header row
- Type of data that will be inserted in the defined number of sections with a specific value



PRINTER PROPERTIES

Open the Printer properties dialog box to define layout and paper/quality. The following options are available:

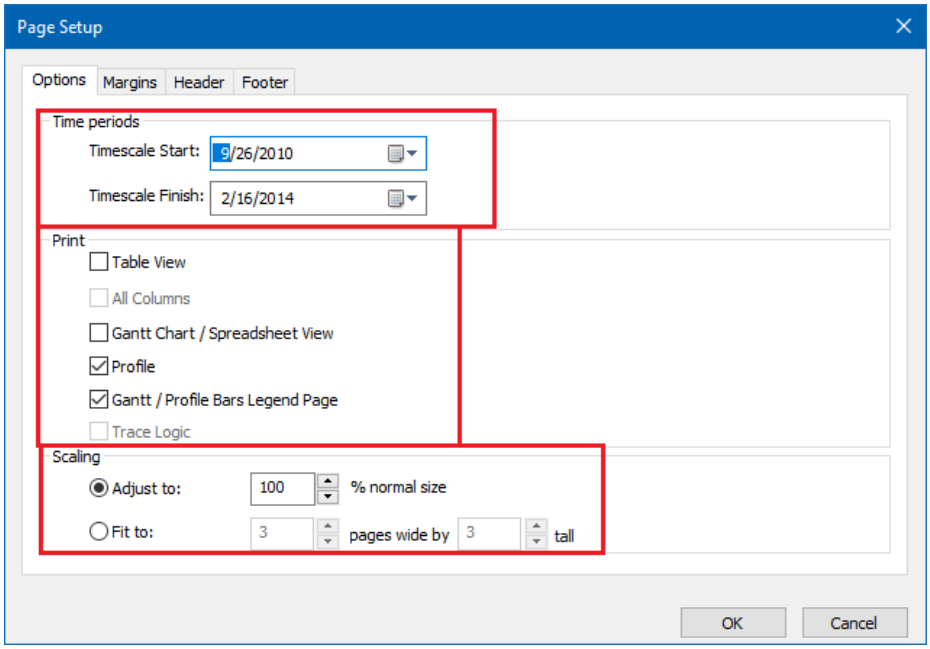


Orientation	Landscape, portrait or rotated landscape.
Page order	Front to back or Back to front order of pages in the document.
Pages per sheet	How many pages to be printed on a page.
Paper source	Automatically select tray or only one tray.
Color	Black and white or color.
Advanced...	Advanced document settings.

SAVE PRINT PREFERENCES

After the printing parameters are set up for a nice print layout, the following settings will be saved:

- Page Setup dialog:
  - Options tab (all available features)
  - Margin tab (all available features)
  - Header tab (all available features)
  - Footer tab (all available features)
- Orientation (Portrait, Landscape)
- Paper Size (A4, A3…)



Note 1: The saved process is automatic.

Note 2: The print settings are saved per layout.

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