

# User Manual Windows

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# Welcome to ScheduleReader™

#### **INTRODUCTION**

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

ScheduleReader<sup>™</sup> 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<sup>™</sup>. These walkthroughs are perfect to learn how to use ScheduleReader<sup>™</sup>.

Watch online

# SUPPORT AND DOCUMENTATION

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

# 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<sup>™</sup> user interface is very **intuitive**, as shown in the figure below.

Default Activities       Default Activity Name       Default Activity Nam	÷	Project Everyt	ning.xer - ScheduleReade	r		Activities _ & ×
Default Activities         Default activitities         Default activities         Defau	File Activities WBS	Projects Resources Assignmen	ts OBS Roles	Reports	Linear Scheduling Project Expenses Progress U	pdate Format 🔨 Style 🕇 🕻
Optimize Activities         Bit Bottom View         Declaims         During Productions         During Productions <thduring productions<="" th=""> <thduring productions<="" t<="" td=""><td></td><td>Gantt</td><td>Resources 🛭 🕏</td><td>Expenses</td><td>FL   🔽 🔽   🕞 🏫 🕹 Go to Activi</td><td></td></thduring></thduring>		Gantt	Resources 🛭 🕏	Expenses	FL   🔽 🔽   🕞 🏫 🕹 Go to Activi	
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Layout         Panes         Table         Outcome         View         Timescale         Find           vity ID         Artidry Name         Start         Finds         Outcome		Details *	rity Successors		Jutline Filter Auto Group Sort	
NY ID     NON ID <td>Layout</td> <td></td> <td></td> <td></td> <td></td> <td>- Intestate</td>	Layout					- Intestate
22-00:19         26-00:19	Activity ID	Activity Name	Start	Finish ^		
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Ailao         Project Mangement         22-Oct:39         07-Nov-19           A1150         Project Start         22-Oct:39         24-Dec           Vision         Project Start         22-Oct:39         05-Docc           A1150         Project Start         22-Oct:39         05-Docc           A1150         Project Start         22-Oct:39         05-Docc           A1000         Grade Stie         22-Oct:34         24-Docc           A1000         Grade Stie         22-Oct:39         24-Docc           A1000         Install Stip Juming         05-Noc:39         05-Docc           A1000         Install Index Start         22-Oct:39         20-Noc:37           A1000         Install Index Start         22-Oct:39         22-Noc:37           A1000         Install Index Start         22-Oct:39         22-Noc:37           A1000         Install Index Start         22-Oct:39         22-Oct:39           <						
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A110     Project Finish     24-Dec-       Grading     22-Oct-19     96-Dec-       Grading     22-Oct-19     96-Dec-       A1000     Survey and mark out site     22-Oct-19     28-Oct-       A1000     Grade site     22-Oct-19     28-Oct-       A1000     Grade site     22-Oct-19     28-Oct-       A1000     Install folds boundation forms     28-Nov-19     06-Nov-19 4       A1000     Install folds boundation forms     28-Nov-19     09-Dec-       A1000     Install folds boundation forms     22-Oct-19     08-Dec-       A1000     Install of share install or shingles     22-Oct-19     08-Dec-       A1000     Install of share install or shingles     22-Oct-19     08-Dec-       A1000     Install of share install or shingles     22-Oct-19     22-Oct-19       A1000     Install or shingles     22-Oct-19     22-Oct-19       A1000     Install or shingles     22-Oct-19     22-Oct-19       A1000     Install or shingle     22-Oct-19     22-Nov-19       A1100     Install or shingle     22-Oct-19     22-Nov-19       A1100     Install or shingle     22-Oct-19     22-Oct-19       A1100     Install or shingle     22-Oct-19     22-Oct-19       A1100     Install HVAC Ducti					Project Start	
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A100         Grade site         29-00:19 A         14-Non- 25-Non-19 A         39-00:19 A         14-Non- 25-Non-19 Residence           A1000         Provide Sibb Scorecte         Get Non-19 A         25-Non-19 A         25-Non-19 A         27-Non-19 Peter Cooper           A1000         Install Stab Jumbing         Get Non-19 A         27-Non-19 A         27-Non-19 Peter Cooper           A1000         Install Sob Buttoric Udding         22-Oct-19 A         22-Non-19 A         27-Non-19 Peter Cooper           A1000         Install OSB Buttoric Udding         22-Oct-19 A         22-Non-19 Peter Cooper         00-Dec-19 D           A1000         Install OSB Buttoric Udding         22-Oct-19 A         22-Non-19 Peter Cooper         00-Dec-19 D           A1000         Install OSB Buttoric Udding         22-Oct-19 A         22-Non-19 Peter Cooper         00-Dec-19 D           A1000         Install Paper and Shingles         28-Oct-19 A         27-Non-19 Peter Cooper         00-Dec-19 D           A1000         Install Paper and Shingles         22-Oct-19 A         27-Non-19 Peter Cooper         00-Dec-19 D           A1000         Install Trasse         22-Oct-19 A         27-Non-19 Peter Cooper         27-Non-19 Peter Cooper           A1100         Install Provide Pater         22-Oct-19 A         30-Oct-19 A         27-Non-19 Peter N		Survey and mark out site			22-Oct-19 A 28-Oct-19 A Lori McNeil	,
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A1300     Install slab plumbling     06-Nov-19 A     27-Nov- 09-Dec 19       A1300     Install of addition forms     28-Nov-19     09-Dec 19       A1300     Erect exterior wall frames     22-Oct-19 A     20-Nov- 19       A1300     Install of addition clading     22-Oct-19 A     20-Nov- 19       A1300     Install rod shingles     22-Oct-19 A     20-Nov- 19       A1100     Install rod shingle     22-Oct-19 A     26-Nov- 19       A1100     Install rod shingle     22-Oct-19 A     26-Nov- 19       A1110     Install rod shingle     22-Oct-19 A     26-Nov- 19       A1110     Install rod shingle     22-Oct-19 A     27-Nov- 19       A1110     Install rod shingle     24-Nov-19     27-Nov- 19       A1110     Install rod shingle     24-Nov-19     24-Nov-19       A1110     Install rod shingle     24-Nov-19     24-Nov-19       A1110     Install rod shingle     24-Nov-19     24-Nov-19       A1110 </td <td></td> <td></td> <td></td> <td></td> <td>05-Nov-19 /</td> <td>26-Nov-19 Ben Frost</td>					05-Nov-19 /	26-Nov-19 Ben Frost
A1340 Install fondation forms 23-Nov-19 09-Dec Foundation 22-Oct-19 03-Dec-19 03-Dec-19 03-Dec-19 A1350 Erect exterior wall frames 22-Oct-19 A 22-Nov- A1360 Erect interior stud walls 23-Oct-19 A 27-Nov- A1360 Erect interior stud walls 23-Oct-19 A 27-Nov- A1360 Erect interior stud walls 23-Oct-19 A 27-Nov- A1360 Install rosses 22-Oct-19 A 25-Nov- A1300 Install rosses 22-Oct-19 A 25-Nov- A1300 Install rosses 22-Oct-19 A 25-Nov- A1300 Install ross 22-Oct-19 A 25-Nov- A1300 Install rosses of the ross and rough wire 14-Nov-19 25-Oct- A1300 Install breaker box and rough wire 14-Nov-19 27-Nov- A1300 Install breaker box and rough wire 14-Nov-19 27-Nov- Activity Type: Task Dependent Duration Type: Fleed Duration & Units Perent Complete Type: Units Perent C					05-Nov-19 A	27-Nov-19 Peter Cooper
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A1550     Erect exterior wall frames     22-Oct-19 A     20-Nov-19       A1570     Install oper and finites     22-Oct-19 A     20-Nov-19       A1000     Install oper and finites     22-Oct-19 A     22-Oct-19 A       A1000     Erect interior stud walls     05-Nov-19 A     27-Nov-19       A1000     Erect interior stud walls     05-Nov-19 A     27-Nov-19       A1000     Install trusses     22-Oct-19 A     28-Nov-       A1000     Install russes     22-Oct-19 A     28-Nov-       A1000     Install russes     22-Oct-19 A     28-Nov-       A1000     Install russes     22-Oct-19 A     28-Nov-       A1100     Install russes     22-Oct-19 A     30-Oct-       Viraning     OH-Nov-19 A     19-Nov-19     26-Nov-       A1110     Install HVAC Ducting     OH-Nov-19 A     19-Nov-19     27-Nov-19       A1110     Install HVAC Ducting     OH-Nov-19 A     19-Nov-19     27-Nov-19     Robert Uncoln       A1110     Install HVAC Ducting     OH-Nov-19 A     19-Nov-19     27-Nov-19     Cindy Lee     20-Dire-19       Activity Name:     Out-Nov-19 A     19-Nov-19     Robert Uncoln     10-Nov-19 - Cindy Lee     20-Dire-19       Activity Name:     Out-Nov-19 A     Activity Name:     Pour and float slab concr					8	03-Dec-19
A1070 Install DSB exterior cladding 22-Oct: 19 A 12-Nov- A1080 Install paper and shingles 28-Oct: 19 A 27-Nov- A1080 Erect interior studies 22-Oct: 19 A 27-Nov- A1090 Install roots sheeting 22-Oct: 19 A 25-Nov- A1000 Install roots sheeting 22-Oct: 19 A 25-Nov- A1100 Install roots sheeting 22-Oct: 19 A 30-Oct. A1100 Install roots sheeting 22-Oct. 19 A 30-Oct. A12-Nov: 19 A 30-Oct. 19 A 40-Oct.		Frect exterior wall frames			22-Oct-19 A	20-Nov-19 Wayne Prescott
A100     Install paper and shingles     22-0ct-19 A     27-Nor- 03-Dect 19 J       A1000     Erect interior stud walls     05-Nov-19 A     27-Nor- 03-Dect 19 J       A1000     Install trustes     22-Oct-19 A     26-Nov- 19 A       A1000     Install trustes     22-Oct-19 A     26-Nov- 19 A       A1000     Install rots hering     22-Oct-19 A     26-Nov- 19 A       A1000     Install rots hering     22-Oct-19 A     30-Oct- 19 A       A1100     Install rots hering     04-Nov-19 Z     26-Dec- 19 Z       A1100     Install rots hering     04-Nov-19 Z     26-Dec- 19 Z       A1100     Install trustes     22-Oct-19 A     26-Dec- 19 Z       A1100     Install trustes     22-Oct-19 A     26-Dec- 19 Z       A1100     Install trustes     04-Nov-19 Z     27-Nov- 22-Dec- 19 Z       A1100     Install trustes     04-Nov-19 Z     04-Nov-19 Z       A1100     Install trustes     04-Nov-19 Z     04-Nov-19 Z       A1100     Install trustes     04-Nov-19 Z     04-Nov-19 Z       A1100					22-Oct-19 A 12-Nov-	19 Frank Chu
A1060     Erect Interior stud walls     05-Nov:19 A     03-Dec- 25-Nov:19 A       Structure     22-Oct:19     22-Nov.19       A1000     Install trusses     22-Oct:19 A       A100     Install trusses     22-Oct:19 A       A100     Install trusses     22-Oct:19 A       A1100     Install trusses     22-Oct:19 A       A1100     Install trusses     22-Oct:19 A       A1100     Install HVAC Ducting     04-Nov:19 A       A1100     Install breaker lox and rough wire     14-Nov:19       A1100     Install breaker lox and rough wire     14-Nov:19       A1100     Install breaker lox and rough wire     14-Nov:19       Activity: A1020     Activity: Name:     Pour and float side concrete       Activity: A1020     Activity: Corporate - Standard Full Time       00-Nov:19 Conduct     WBS: Grading       Responsible Manager:     Entrypice       Percent Complete Type:     Units	A1080	-	28-Oct-19 A	27-Nov-	28-Oct-19 A	27-Nov-19 Gary Marshall
Structure     22-Oct-19     25-Nov- 12500       A1500     Install trustes     22-Oct-19 A     30-Oct-19 A       A1100     Install rod sheeting     22-Oct-19 A     30-Oct-19 A       A1100     Install rod sheeting     04-Nov-19     25-Nov-19       A1100     Install rod sheeting     04-Nov-19     25-Nov-19       A1100     Install rod sheeting     04-Nov-19     25-Nov-19       A1100     Install rod sheeting     04-Nov-19     27-Nov-19       A1100     Install rod sheeting     04-Nov-19     19-Nov-19     Report 10       A1100     Install rod sheeting     04-Nov-19     27-Nov-19     19-Nov-19       A1100     Install rod sheeting     04-Nov-19     19-Nov-19     Report 10       A1100     Install rod sheeting     04-Nov-19     19-Nov-19     Report 10       A1100     Install rod sheeting     04-Nov-19     19-Nov-19     Report 10       A1100     Install rod sheeting     04-Nov-19     19-Nov-19     19-Nov-19       Report 10     Activity: A1020     Activity Name: Pour and float she conc	A1060		05-Nov-19 A	03-Dec-	05-Nov-19 A	03-Dec-19 Judy Billings
Alito     Install root sheeting     22-Oct-19 A     30-Oct-19 A     Harry Shaw       41100     Install root sheeting     02-Oct-19 A     30-Oct-19 A     Harry Shaw       41100     Install root sheeting     04-Nov-19     26-Dec       41100     Install breaker lox and rough wire     14-Nov-19     27-Nov-10       41100     Install breaker lox and rough wire     14-Nov-19     27-Nov-10       41100     Install breaker lox and rough wire     14-Nov-19     27-Nov-10       41100     Install breaker lox and rough wire     14-Nov-19     27-Nov-10       41100     Install breaker lox and rough wire     14-Nov-19     27-Nov-10       41100     Activity:     A1020     Activity: Name:     Poor and float slab concrete       Activity:     A1020     Activity: Calendar:     Corporate Standard Full Time       Sources     Activity:     Frack Dependent     Activity: Calendar:     Corporate Standard Full Time       Sources     International Statility:     Frack Dependent     Activity: Calendar:     Corporate Standard Full Time       Percent Complete Type:     Units     Wits:     Grading       Responsible Manager:     Enterprise       Primary Resource:     Frost B.Ben Frost	✓ Structure		22-Oct-19		2	26-Nov-19
Attain     Attain <td>A1090</td> <td>Install trusses</td> <td>22-Oct-19 A</td> <td>26-Nov-</td> <td>22-Oct-19 A</td> <td>26-Nov-19 Paul Riley</td>	A1090	Install trusses	22-Oct-19 A	26-Nov-	22-Oct-19 A	26-Nov-19 Paul Riley
All10     Install HVAC Ducting     O4-Nov-19     26-Dec (1)       All10     Install HVAC Ducting     O4-Nov-19     A       1130     Install breaker box and rough wire     14-Nov-19     27-Nov- 27-Nov-19     27-Nov- 14-Nov-19       1130     Install breaker box and rough wire     14-Nov-19     27-Nov- 27-Nov- 27-Nov- 27-Nov-19     27-Nov- 14-Nov-19       nerelation     Activity:     A120     Activity Name:     Pourter in the state concrete       nerelation     Activity:     A120     Activity Calendar:     Corporate - Standard Full Time       sources     Duration Type:     Fixed Duration & Units     WBS:     Grading       Percent Complete Type:     Units     Responsible Manager:     Enterprise       Primary Resource:     FrostB.Ben Frost	A1100	Install roof sheeting	22-Oct-19 A	30-Oct-	22-Oct-19 A Harry Shaw 30-Oct-19 A Harry Shaw	
A1110     Install HVAC Ducting     04-Nov-19 A     19-Nov-19 A       A1130     Install breaker box and rough wire     14-Nov-19 I     27-Nov-19 A       Install breaker box and rough wire     14-Nov-19 I     27-Nov-19 A       Install breaker box and rough wire     14-Nov-19 I     27-Nov-19 A       Install breaker box and rough wire     14-Nov-19 I     27-Nov-19 A       Install breaker box and rough wire     14-Nov-19 I     27-Nov-19 A       Install breaker box and rough wire     14-Nov-19 I     27-Nov-19 A       Install breaker box and rough wire     14-Nov-19 I     27-Nov-19 C       Install breaker box and rough wire     14-Nov-19 I     27-Nov-19 C       Install breaker box and rough wire     14-Nov-19 I     27-Nov-19 C       Install breaker box and rough wire     14-Nov-19 I     10-Nov-19 A       Install breaker box and rough wire     14-Nov-19 I     10-Nov-19 C       Install breaker box and rough wire     14-Nov-19 I     10-Nov-19 C       Install breaker box and rough wire     Activity Name: Pour and float slab concrete     Install breaker box and rough wire       Install breaker box and rough wire     Install breaker box and rough wire     Activity Calendar: Corporate - Standard Full Time       Sources     Install breaker box and rough wire     Install breaker box and rough wire     Install breaker box and rough wire       Install breake	✓ Framing				p	26-Dec-19
A1130     Install breaker hox and rough wire     14-Noy-19     27-Noy-10       erral     0     0     0       tus     0     0     0       sources     Activity: A102/     Activity Name: Pour and float slab concrete       Activity: Type: Task Dependent     Activity Calendar: Corporate - Standard Full Time       burston Type: Keed Duration & Units     WBS: Grading       Percent Complete Type: Units     Responsible Manager: Enterprise       Primary Resource: FrostB.Ben Frost		Install HVAC Ducting			04-Nov-19 A	19-Nov-19 Robert Lincoln
Activity:     Al20     Activity Name:     Pour and float slab concrete       nereal     Activity:     Al20     Activity Name:     Pour and float slab concrete       nereal     Activity:     Activity:     Activity Calendar:     Corporate - Standard Full Time       sources     Duration Type:     Fixed Duration & Units     WBS:     Grading       lationships     Percent Complete Type:     Units     Responsible Manager:     Enterprise       des     Primary Resource:     Frost     Primary Resource:     Frost		-			14-Nov-19	27-Nov-19* Cindy Lee
Activity:         Al020         Activity Name:         Pour and float slab concrete           tus         Activity Type:         Task Dependent         Activity Calendar:         Corporate - Standard Full Time           sources         Duration Type:         Fixed Duration & Units         W85:         Grading           lationships         Percent Complete Type:         Units         Responsible Manager:         Enterprise           des         Fixed Duration Activity Type:         Fixed Duration & Units         Percent Complete Type:         Percent Complete Type:		1	04 D 10	04 Dec V		nde-Der-19 - 24-Der-19* Andrea Cacev
Activity Type:     Task Dependent     Activity Calendar:     Corporate - Standard Full Time       sources     Duration Type:     Fixed Duration & Units     WBS:     Grading       lationships     Percent Complete Type:     Units     Responsible Manager:     Enterprise       des     Percent Complete Type:     Units     Primary Resource:     Frost	<			>	<	>
sources Duration Type: Fixed Duration & Units WBS: Grading Percent Complete Type: Units Responsible Manager: Enterprise Jes	General	Activity:	A1020		Activity Name: Pour and float slab concrete	
Istionships Percent Complete Type: Units Responsible Manager: Enterprise Istionships Primary Resource: FrostB.8en Frost	Status	Activity Type:	Task Dependent		Activity Calendar: Corporate - Standard Full Time	
Altionships Primary Resource: Frost B.Ben Frost	Resources					
des	Relationships	Percent Complete Type:	Units			
rebook	Codes					
	Notebook					

#### 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<sup>™</sup> are given in different **ribbons**:

÷	Project Evenything.xer - ScheduleReader									Activiti	es				-	ø	×					
File	Activities	WBS	Projects	Resources	Assig	Inments	OBS	Roles	Reports	Linea	ir Schedu	ling	Project	Expenses	Progress Update	Format				^	Style	3
💾 Det	fault Activities	Ŧ	Gantt Bottor Details		*	Activity	Predecess	ors	Expenses	Outline	Filter	Auto Filter	Group	€ Sort	Go to Activity Calendar	+++ Month/	Neek	+ Custo	omize Find	)		
	Layout			Panes			Table	2				Data			View		Timescale		Find			

- 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<sup>™</sup> 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.

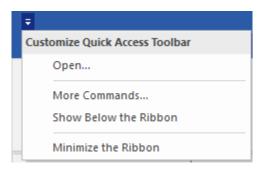
#### DETAILS

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

General	Activity:	EC1090	Activity Name:	Building Pad Including UG Utils
Status	Activity Type:	Task Dependent	Activity Calendar:	Trades - 5 Day Workweek
Resources	Duration Type:	Fixed Duration and Units/Time	WBS:	Structure
	Percent Complete Type:	Physical	Responsible Manager:	E&C
Relationships			Primary Resource:	Concrete-Sub.Concrete Foundation Su
Codes				
Notebook				
Steps				
Feedback				
Expenses				
User Defined Fields				

#### 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

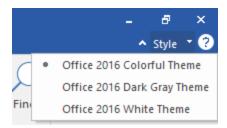
The first tab of the ribbon is the **File** menu which includes the following commands:

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**  $\rightarrow$  **Info**.

# View project

#### **OPEN FILE**

In ScheduleReader<sup>™</sup> you can import project data exported from Oracle<sup>®</sup> Primavera<sup>®</sup> 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<sup>™</sup>.

#### VIEW PROJECT STATISTICS

When you import file in ScheduleReader<sup>™</sup> 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.

÷	Project Everyth	Activities	- 8 ×			
File Activities WBS	Projects Resources Assignment	s OBS Roles Report	s Linear Scheduling Project Expenses	Progress Update Format		∧ Style ▼ ?
Default Activities 🔹	Gantt Bottom View Details		Outline Filter Auto Group Sort	Calendar Financial Periods	+ Customize F Timescale	ind
Layout	Panes	Table	Data	View		ind
Activity ID	Activity Name	Start 🛛 🐺 Finish	A October 2019 05 13 20 27 03	November 2019 10 17 24 01	December 2019 08 15 22 29	January 2 A
✓ Project Costs - Working version		22-Oct-19 26-Dec-	P		q 26-Dec-19	
✓ Project Management		22-Oct-19 26-Dec-	P		26-Dec-19	)
A1140	Project Management	22-Oct-19 A 07-Nov-		07-Nov-19		
A1150	Project Start	22-Oct-19 A	Project Start			
A1160	Project Finish	24-Dec-			Project Finis	'n
✓ Grading		22-Oct-19 09-Dec-	P		09-Dec-19	
A1000	Survey and mark out site	22-Oct-19 A 28-Oct-	22-Oct-19 A	Lori McNeil		
A1010	Grade site	29-Oct-19 A 14-Nov-	29-Oct-19 A	14-Nov-19 Rea Johnson		
A1020	Pour and float slab concrete	06-Nov-19 A 26-Nov-	05-Nov-19 / 🛏	26-Nov-19	Ben Frost	
A1030	Install slab plumbing	06-Nov-19 A 27-Nov-	06-Nov-19 A	27-Nov-19	Peter Cooper	
A1040	Install fondation forms	28-Nov-19 09-Dec-		28-Nov-19	09-Dec-19 Michelle Peterson	
✓ Foundation		22-Oct-19 03-Dec-	p	q 0:	13-Dec-19	
A1050	Erect exterior wall frames	22-Oct-19 A 20-Nov-	22-Oct-19 A	20-Nov-19 Wayne F	Prescott	
A1070	Install OSB exterior cladding	22-Oct-19 A 12-Nov-	22-Oct-19 A	12-Nov-19 Frank Chu		
A1080	Install paper and shingles	28-Oct-19 A 27-Nov-	28-Oct-19 A	27-Nov-19	Gary Marshall	
A1060	Erect interior stud walls	05-Nov-19 A 03-Dec-	05-Nov-19 A		B-Dec-19 Judy Billings	
✓ Structure		22-Oct-19 26-Nov-	P	26-Nov-19		
A1090	Install trusses	22-Oct-19 A 26-Nov-	22-Oct-19 A	26-Nov-19	Paul Riley	
A1100	Install roof sheeting	22-Oct-19 A 30-Oct-	22-Oct-19 A 30-Oct-19	A Harry Shaw		
✓ Framing		04-Nov-19 26-Dec-			26-Dec-19	3
A1110	Install HVAC Ducting	04-Nov-19 A 19-Nov-	04-Nov-19 A	19-Nov-19 Robert Lir	ncoln	
A1130	Install breaker box and rough wire	14-Nov-19 27-Nov-	14-1	Nov-19 27-Nov-19	9* Cindy Lee	
#1120	Install Direction box and rought three	04 D 10 04 D	×	n4-Dec-19	24-Der-19*	Andrea Casev Y
<		>	<			>
General	Activity:	A1020	Activity Name: Pour and float s	slab concrete		^
Status	Activity Type:	Task Dependent	Activity Calendar: Corporate - Star	ndard Full Time		
Resources		Fixed Duration & Units	WBS: Grading			
Relationships	Percent Complete Type:	Units	Responsible Manager: Enterprise Primary Resource: FrostB.Ben Fros	<i>u</i> +		
Codes			Filmary Resource. Flostb.bell Flos	м		
Notebook						· · · ·

## 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.
<b>Relationship Lines</b>	Show/Hide relationships in the Gantt chart view.
Calendar	View details for assigned global, project and resource calendars.
<b>Financial Periods</b>	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.

Percent Completes

Units

Custor

Edit Column

Close

Customize Columns			×
Available Columns		Inserted Columns	
Activity Codes - Global	<b>~</b> ^	Activity ID	
Activity Steps	<b>v</b>	Activity Name	
Costs	<b>v</b>	Start	
Dates	<b>v</b>	Finish Predecessors	
Durations	<b>v</b>	Tredecessors	
Feedback	<b>v</b>	>	
General	<b>v</b>	<	$\sim$
Lists	<b>v</b>		
Multiple Float Paths	•		
Number of Activities	<b>v</b>		

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.

Edit Column		×
Column Parame	ters	ОК
Default Title:	Activity ID	Cancel
New Title:	Activity ID	Reset to default
Width:	200 🔹	
Alignment:	Left 🗸	

#### 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.

Activities notes.
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.
View the feedback from various sources related to the specific activity.
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.

	Project Everyth	ng.xer - ScheduleReade				Activiti		- 8
le Activities WBS	Projects Resources Assignment	OBS Roles	Reports	Linear Scheduling	Project Expenses	Progress Update	Format	▲ Style
Default Activities 🔷	Gantt Bottom View Trace Logic		Expenses	Outline Tilter	Group Sort	Go to Activity Calendar	+++ Month/Wee	+ Customize Find Timescale
Layout	Panes	Table		Data		View		Timescale Find
vity ID	Activity Name	Start	🗸 Finish	Actual Start	^ <u>02</u>	Q3 Q4	20 01 02	10 2011 Q3 Q4 Q1 Q2 Q3 Q4
EC1090	Building Pad Including UG Utils	01-Sep-10 A	23-Nov-10	A 01-Sep-10		40 44	01-Sep-	10 A23-Nov-10 A Concrete Foundation Subco
EC1140	First Floor Masonry Structure	24-Nov-10 A	13-Dec-10	A 24-Nov-10				24-Nov-10 A 13-Dec-10 A Laborer-Construction
EC1170	Second Floor Slab & Collar Beam	15-Dec-10 A	31-Jan-11	A 15-Dec-10				15-Dec-10 A 31-Jan-11 A Laborer-Constructio
EC1190	Second Floor Masonry Structure	26-Jan-11 A	22-Feb-11					26-Jan-11 A 22-Feb-11 A Laborer-Construc
EC1210	Third Floor Slab & Collar Beam	23-Feb-11 A	07-Apr-11	A 23-Feb-11				23-Feb-11 A 07-Apr-11 A Laborer-Con
EC1240	Third Floor Masonry Structure	12-Apr-11 A	05-May-11					12-Apr-11 A
EC1250	Fourth Floor Slab & Collar Beam	05-May-11	17-Jun-11					05-May-11, 17-Jun-11 Labor
EC1300	Fourth Floor Masonry Structure	17-Jun-11	11-Jul-11					17-Jun 11, 👝 11-Jul-11 Lab
EC1310	Roof Slab	11-Jul-11	22-Aug-11					11-Jul-11 22-Aug-11
EC1340	Stair and Elevator Masonry Structure	22-Aug-11	30-Aug-11					22-Aug-11-30-Aug-1
EC1350	Roof Slab/Collar Beam	30-Aug-11	21-Sep-11					30-Aug-11 _ 21-Sep
Roof		21-Sep-11	25-Jan-12					
EC1390	Place Roof Trusses and Sheathing	21-Sep-11	02-Nov-11					21-Sep 11, 02
EC1400	Place Mechanical Equipment Supports	21-Sep-11	02-Nov-11					21-Sep-11
EC1530	Built-Up Asphalt Roofing	02-Nov-11	04-Jan-12		~			02-Nøv-11
EC1340 Stair and Elevat Structure	tor Masonry	Collar Beam		EC1390 Floce Roof Trusses and Sheathing		EC1540 Felt and Tile Roof	ing	EC1780 Roof Complete EC1550 Unit Finishes Building North - Floor 1 EC080 Pool & Deck

#### 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.

÷				Project E	Everything	g.xer - ScheduleR	eader	r				Activiti	ies			. 8 ×
File	Activities WBS	Proje	cts Resources	Assig	Inments	OBS Rol	es	Reports	Line	ar Scheduling	Project Expenses	Progress Update	Format			🔺 Style 🔹 ?
E Default	Activities	- [	Gantt Bottom View source Usage Profile Panes	÷	Activity	Resources  Predecessors  Successors  Table		Expenses	Outline	Filter Auto Filte Data	r	Go to Activity Calendar Financial Periods View	# Month/Week	+ Cus	tomize escale Find	
		1	Original Duration			Finish	•	3. 2010		0000		Otr 4, 2010			Otr 1, 2011	^
	Activity Name		Original Duration	Start		Finish 24-3ep-14		Aug		Sep	Oct	Nov	Dec	Jan	Feb	Ma
	comprete building .		268	01-Sep	-10	21-Sep-11			-							
	Fourth Floor Slab &			05-May		17-Jun-11			ſ							
	Fourth Floor Mason			17-Jun-		11-Jul-11										
	Roof Slab		30	11-Jul-1		22-Aug-11										
	Stair and Elevator N	Masonry	6	22-Aug		30-Aug-11										
	Roof Slab/Collar Be	am	15	30-Aug	-11	21-Sep-11										
	Third Floor Masonn	y Structi	15	12-Apr-	-11 A	05-May-1	1									
	Building Pad Includi	ing UG	60	01-Sep	-10 A	23-Nov-10	14				1	<b>4</b> 23-	Nov-10 A			
	First Floor Masonry	/ Structu	15	24-Nov	-10 A	13-Dec-10	Α					5	13-Dec-10 A			
	Second Floor Slab 8	& Collar	30	15-Dec-	-10 A	31-Jan-11	Α						<b>ب</b>		31-Jan-11 A	
	Second Floor Masor	nry Stru	15	26-Jan-	-11 A	22-Feb-11	A								2	2-Feb-11 A
	Third Floor Slab & C	Collar Be	30	23-Feb	-11 A	07-Apr-11	Α								5	
			87	21-Sep	-11	25-Jan-12										
	Place Roof Trusses		30	21-Sep		02-Nov-11										~
<				01.0	**		× .	<								>
Role ID		Ro	e Name		Inte	rnal Rate										
✓ E&C		E&	C Roles					\$17,500								
Mana	ge	Ma	nagement													
Trades	s	Tra	des					\$14,000								
							- 1									
								\$10,500								
								\$7,000.0								
								<sup>-\$3,500.0</sup>								
								Aug		Sep	Oct	Nov	Dec	Jan	Feb	Mar
								3, 2010				Qtr 4, 2010			Qtr 1, 2011	
								<								>

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.

Options		
Time Units	Units Format	
Date Format	Unit of Time	Decimals
Timescale	Day 🗸	1 ~
Language	Day Hour	
Table Format	Month Week	
Display Codes	Year	

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 scurves 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).

Resource Usage Profile Options			×
Display			
<ul> <li>Units</li> </ul>			
◯ Cost			
Show Bars/Curves	Du Data	Cumulative	
Budgeted	By Date		
Actual			
Remaining Early			
Remaining Late			
Additional Data Options			
Show Limit	Show Overtime		
Show Overallocation	Show Legend		
		OK Cancel	

		Project Everything	J.xer - Scheo	duleRead	ler								Activit												8 )
File Activities WBS	Projects Resources	Assignments	OBS	Roles	Reports	: Line	ear Schedu	ling	Project	Expense	es P	rogress l	Update		Format									^ s	tyle 🔹
Default Activities	Gantt Gantt Bottom View Resource Usage Profile	Activity	Resour	essors	Expenses	Outline	Filter	Auto Filter	Group	Î. Sort	Ca	o to Activ alendar nancial F			Mont	h/Week	:		•	Custo	D mize	Fir	nd		
Layout	Panes			ble				Data				View					Time	scale		miles	care	Fir	nd		
Activity ID	1	Start	Ei 1		2010		2	011			2012		1	2	013		1		2014		<b>_</b>		20	15	
	Activity Name	Start	EI '	21	Q2 Q3	Q4 (	01 02		Q4 (	Q1 (	2 Q3	Q4	Q1	Q2		Q4	Q1			Q	4 Q	1	Q2	Q3	Q4
EC1300	Fourth Floor Masonry St	truc 17-Jun-11	1:				- F	11-Jul-	11																
EC1310	Roof Slab	11-Jul-11	2:				0	22-	Aug-11																
EC1340	Stair and Elevator Maso	nry 22-Aug-11	3(					54 30	Aug-11																
EC1350	Roof Slab/Collar Beam	30-Aug-11	2:				-1-1-1-	- <b>F</b> a 2	1-Sep-1	1															
EC1240	Third Floor Masonry Str	ucti 12-Apr-11 A	0!				<b>H</b>	5-May-11																	
EC1090	Building Pad Including L	JG ( 01-Sep-10 A	2:			423-1	NOV-10 A																		
EC1140	First Floor Masonry Stru	ctu 24-Nov-10 A	1			5 13	-Dec-10 A																		
EC1170	Second Floor Slab & Col	lar 15-Dec-10 A	3:			G L	31-Jan-11	A																	
EC1190	Second Floor Masonry S	true 26-Jan-11 A	2:		1-1-1-1-1-	-	22-Feb-	11 A																	
EC1210	Third Floor Slab & Colla	r Be 23-Feb-11 A	0. *	<			► 07-1	Aprill A																	>
							1 1 1 1 1																		
esource ID	Resource Name	Prir	nary Role 🖌	<b>`</b>																					
	Resource Name E&C Resources	Prir	nary Role 1																						
		Prir	nary Role	Ì																					3000.
E&C Resources	E&C Resources	Prir Tra	_																						3000
E&C Resources Trades	E&C Resources Trades		des																						
E&C Resources Trades Elec	E&C Resources Trades Electrician	Tra	des des	•																					
E&C Resources Trades Elec Paint	E&C Resources Trades Electrician Painter	Trai Trai	des des des																						
E&C Resources Trades Elec Paint Floor	E&C Resources Trades Electrician Painter Floor and Carpet Layer	Tra Tra Tra	des des des des																						2400
E&C Resources ✓ Trades Elec Paint Floor GenLabor	E&C Resources Trades Electrician Painter Floor and Carpet Layer Laborer-Construction	Tra Tra Tra Tra Tra	des des des des des des																						3000 2400 1800
E&C Resources ✓ Trades Elec Paint Floor GenLabor Plumb	E&C Resources Trades Electrician Painter Floor and Carpet Layer Laborer-Construction Plumber	Tra Tra Tra Tra Tra	des des des des des des des	•											/										2400
E&C Resources Trades Elec Paint Floor GenLabor Plumb RCarp	E&C Resources Trades Electrician Painter Floor and Carpet Layer Laborer-Construction Plumber Rough Carpenter	Trai Tra Tra Tra Tra Tra Tra Tra Tra	des des des des des des des	• • • •									/		/										2400
E&C Resources ▼ Trades Elec Paint Floor GenLabor Plumb RCarp FCarp	E&C Resources Trades Electrician Painter Floor and Carpet Layer Laborer-Construction Piumber Rough Carpenter Finish Carpenter	Trai Tra Tra Tra Tra Tra Tra Tra Tra	des des des des des des des des	• • • •									/												2400
E&C Resources ✓ Trades Elec Paint Floor GenLabor Plumb R Carp FCarp ✓ Engineering	E&C Resources Trades Electrician Painter Floor and Carpet Layer Laborer-Construction Plumber Rough Carpenter Finish Carpenter Engineering Departmen	Trai Trai Trai Trai Trai Trai Trai Trai	des des des des des des des des	• • • •																					2400
E&C Resources ▼ Trades Elec Paint Floor GenLabor Plumb RCarp FCarp FCarp KCarp HVAC	E&C Resources Trades Electrician Painter Floor and Carpet Layer Laborer-Construction Plumber Rough Carpenter Finish Carpenter Engineering Departmen HVAC	Tra Tra Tra Tra Tra Tra Tra Tra Tra Tra	des des des des des des des des	• • • • •																					2400 1800 1200
E&C Resources ✓ Trades Elec Paint Floor GenLabor Plumb RCarp FCarp FCarp ✓ Engineering HVAC ✓ Management	E&C Resources Trades Electrician Painter Floor and Carpet Layer Laborer-Construction Plumber Rough Carpenter Flinish Carpenter Engineering Departmen HVAC Management	Tra Tra Tra Tra Tra Tra Tra Tra Tra Tra	des des des des des des des des	• • • • • • •			/																		2400 1800 1200
E&C Resources     Trades     Elec     Paint     Floor     GenLabor     Plumb     RCarp     FCarp     FCarp     Carp     HVAC     Management     PMS	E&C Resources Trades Electrician Painter Floor and Carpet Layer Laborer-Construction Plumber Rough Carpenter Engineering Departmen HVAC Management Project Managers	Trai Tra Tra Tra Tra Tra Tra t Tra t Ma	des des des des des des des des	• 			/																		2400 1800 1200
Elec Paint Floor GenLabor Plumb RCarp FCarp FCarp HVAC Management PMS Subcontractors	E&C Resources Trades Electrician Painter Floor and Carpet Layer Laborer-Construction Plumber Rough Carpenter Flinish Carpenter Engineering Departmen HVAC Management Project Managers Subcontractor	Tra Tra Tra Tra Tra Tra Tra Tra Tra Tra	des des des des des des des des		02 9	3 04		22 03	04	01	02	03 0	4 C		02	Q3	Q4	<b>01</b>	02	Q3	04	01		Σ	2400

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;

Resource Usage Profile Options			×
Display O At Completion Units			
Show No cumulative curve Individual cumulative curves Total cumulative curve			
Select Pattern/Color			
Filter/Group Name	Pattern	Color	
			< >
Add Delete			
		ОК	Cancel

- 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.

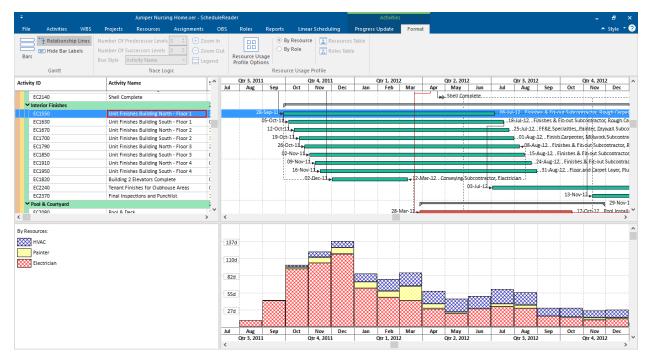
Filter						×
Filter Name	HVAC					OK
						Cancel
Display	all rows	Parameter	ls	Value	High Value	
		(All of the following)				Add
And		Resource Name	equals	HVAC		Add
						Delete

- 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.

Visplay			
O At Completion Units			
<ul> <li>At Completion Cost</li> </ul>			
how			
○ No cumulative curve			
<ul> <li>Individual cumulative curves</li> </ul>			
<u> </u>			
O Total cumulative curve			
○ Total cumulative curve			
-			
-	Pattern	Color	
elect Pattern/Color Filter/Group Name V THVAC	******	***	
elect Pattern/Color Filter/Group Name THVAC Painter			
elect Pattern/Color Filter/Group Name V THVAC	******		
elect Pattern/Color Filter/Group Name THVAC Painter			
elect Pattern/Color Filter/Group Name THVAC Painter			~
elect Pattern/Color Filter/Group Name THVAC Painter			^ ~
elect Pattern/Color Filter/Group Name THVAC Painter			· ·

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.

-	arbour Pointe Assisted Livi	ing Center.xer - Sche	duleReader					Activ	ties											-	6
File Activities WBS	Projects Resources Assignments	OBS Roles	Reports Lin	ear Schedulin	g Proj	ect Exper	ises Prog	ress Updat	e Format												▲ Style ▼
	Gantt	Resource	s 🚯 Expenses	EL '	$\bigtriangledown$	7 6	_] <u>î</u> [	诸 Go to	Activity	🗰 Quarte	w/Mont	'h		00	C						
Default Activities	<ul> <li>Bottom View</li> </ul>	Predeces			U L		-1 14	🕕 Calen	dar	TP durine				00							
	Activity Usage Profile	Activity 🐽 Successo	rs	Outline	Filter Au Filt		oup Sort	🗯 Finani	ial Periods				- +	Customiz Timescale							
Layout	Panes	Table			Da	ta		Vi	ew			Timescal	2		Find						
ctivity ID	Activity Name	Start ^	Qtr 2, 201	Jun Jul	Qtr 3, 201 Aug	0 Sep	Qtr 4, 2 Oct Nov		Qtr 1, 2 Jan Feb	011 Mar	Apr	Qtr 2, 2011 May	Jun J	Qtr 3, 1	011 Sep		Qtr 4, 2011 Nov D	c Jar	Qtr 1, 2012 Feb		Qtr 2, 2 Apr May
Harbour Pointe Assisted Living	gCenter	01-Sep-																			
EC1010	Building Pad Delivered by Owner	01-Sep-				Buildin	g Pad Delivere	ed by Own	er					_				_			
EC2430	Substantial Completion - All TCO																				
<ul> <li>Building 1</li> </ul>		01-Sep-				_	_		_	-	_		_	_	-	_			-	_	
EC2440	Complete Building 1																				
✓ Structure		01-Sep-														21-Sep-	11				
EC1090	Building Pad Including UG Utils	01-Sep-		01-	Sep-10 A				0 A Concret												
EC1140	First Floor Masonry Structure	24-Nov-					24-Nov-10 🗛		Dec-10 A Lat												
EC1170	Second Floor Slab & Collar Beam	15-Dec-					15-Dec-1		31-J	lan-11 A L											
EC1190	Second Floor Masonry Structure	26-Jan-1										borer-Con									
EC1210	Third Floor Slab & Collar Beam	23-Feb-							23-Feb-11 A	12-Apr-11 A		r		instruction							
EC1240	Third Floor Masonry Structure	12-Apr-:									May-11			n-11 Lab		truction					
EC1250	Fourth Floor Slab & Collar Beam	05-May-								03-1	way-11	17-Jun-11		11-Jul-11							
EC1300	Fourth Floor Masonry Structure	17-Jun-1											-Jul-11	11-30-11			prer-Constru	tion			
EC1310	Roof Slab	11-Jul-1												Aug.11			borer-Consti				
EC1340 EC1350	Stair and Elevator Masonry Structur Roof Slab/Collar Beam													30-Aug-11			11 Laborer-I		00		
≥ Roof	Root Slab/Collar Beam	30-Aug-																	g 25-Jan-1	2	
EC1390	Place Roof Trusses and Sheathing	21-Sep- 21-Sep-												21-9	ep-11		02-Nov-1		Subcontra		alty Metal
EC1390	Place Mechanical Equipment Suppo														ep-11				Subcontra		
EC1400	Built-Up Asphalt Roofing	02-Nov-														-Nov-11			Jan-12 Ro		ontractor
CC1540	Colt and Tile Deefing	02 Mov													02	-Nov-11			25-Jan-1	2 Roofing	2 Subcontr
		>	<																		>
Il Activities			562.50d																		
nected Activity			502.500																ludgeted La Actual Labor		
			450.00d																	-	-
			337.50d																		
			225.00d																		
			112.50d																		
			Apr May	Jun Jul	Aug	Sep	Oct Nov	Dec	Jan Feb		Apr	May	Jun J	ul Aug	Sep	Oct	Nov D	ec Jar			Apr Ma
			Qtr 2, 201	)	Qtr 3, 201	0	Qtr 4, 2	010	Qtr 1, 2	011	0	Qtr 2, 2011		Qtr 3, 2	011		Qtr 4, 2011		Qtr 1, 2012	2	Qtr 2,

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;

Activity Usage Profile Options			×
Display			
OUnits			
Cost			
Show Bars/Curves	By Date	Cumulative	
Baseline			
Budgeted			
Actual			
Remaining Early			
Remaining Late			
Additional Data Options			
Show Legend			
		ОК	Cancel

- 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.

Options		
Time Units	Units Format	
Date Format	Unit of Time	Decimals
Timescale	Day 🗸	1 ~
Language	Day Hour	
Table Format	Month Week	
Display Codes	Year	

#### 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.

÷		Red Riv	ver - Refu	l Outage.xer	ScheduleReader								-	8
File Activities WBS Pr	ojects Resources Assignme	nts OBS Roles R	Reports	Linear Sch	duling Project Exp	enses								Style 👻
Layout	Gantt Details WBS Outline Fanes Table Dat	Financial Pe	1	Uuarter/M	+ (	Timescale	Find							
WBS Code	WBS Name	Start	Fin ^	4, 2010 Nov Dec	Qtr 1, 2011 Jan Feb	Mar Ap	Qtr 2, 201 May	1 Jun	Jul	Qtr 3, 2011 Aug	Sep Or	Qtr 4, 20: t Nov	Dec	Jan
▼ EC00515	City Center Office Building Addition	01-Nov-10 A	03-	NOV Dec	Jan Feb	Mar Api	мау	Jun	Jui	Aug	Sep O		Dec	Jan
EC00515.D&E	Design and Engineering	01-Nov-10 A	06-			06	Apr-11 A							
EC00515.Found	Foundation	23-Feb-11 A	19-		23-Feb-11 A						19-Sep	11		
EC00515.Structure	Structure	19-Sep-11	20-							19-Sep-	11			_
<ul> <li>EC00515.Mechanicals</li> </ul>	Mechanical/Electrical Systems	14-Apr-11 A	26-		1	4-Apr-11 A 💼							i i	_
EC00515.Mechanicals.Lifts	Elevator	04-Apr-12	12-											
EC00515.Mechanicals.HVAC	HVAC	14-Apr-11 A	26-		1	4-Apr-11 A 💼								_
EC00515.Mechanicals.Systems	Plumbing and Electrical	20-Jan-12	23-										20-Jan	-12
EC00515.Ex-Finish	Exterior Finishes	17-Feb-11 A	19-		17-Feb-11 A									_
EC00515.Ex-Finish.Brick	Brick	17-Feb-11 A	15-		17-Feb-11 A								i i	_
EC00515.Ex-Finish.Roof	Roof	15-May-12	19-											
EC00515.Ex-Finish.Win	Doors and Windows	27-Apr-12	08-											
<ul> <li>EC00515.Int-Finish</li> </ul>	Interior Finishes	25-Feb-11 A	03-		25-Feb-11 A								i i	_
EC00515.Int-Finish.Fixtures	Plumbing and Lighting Fixtures	08-Apr-13	10-											
EC00515.Int-Finish.Coverings	Floor and Carpeting	25-Feb-11 A	04-		25-Feb-11 A 💼								i i	_
EC00515.Int-Finish.Carp	Carpentry	27-Mar-13	19-											
EC00515.Int-Finish.Paint	Paint	14-Feb-13	04-											
<ul> <li>MFG00772</li> </ul>	Cordova - Plant Expansion & Moden	ni 01-Dec-10 A	30-	·10 A p										
<ul> <li>MFG00772.Auto</li> </ul>	Automated System	01-Dec-10 A	08-	·10 A				i i					08-Dec	-11
MFG00772.Auto.DesEng	Design Engineering	01-Dec-10 A	14-	·10 A		eb-11 A								
<ul> <li>MFG00772.Auto.SysEng</li> </ul>	System Engineering	14-Feb-11 A	26-		14-Feb-11 A						26-5	p-11		
MFG00772.Auto.SysEng.TempCtl	Temperature Control Equipment	15-Feb-11 A	27-		15-Feb-11 A			27-May-1	1					
MFG00772.Auto.SysEng.RobotCti	Robot Controller	16-Feb-11 A	26-		16-Feb-11 A						26-S	p-11		
MFG00772.Auto.SysEng.SysCtl	System Controller	15-Feb-11 A	08-		15-Feb-11 A						08-Sep-11			
MFG00772.Auto.SoftEng	Software Engineering	22-Sep-11	08-							22-Sep	-11		08-Dec	
MFG00772.Auto.Train	Training	25-Nov-11	07-										07-Dec	
MFG00772.Auto.Train.Manual	Manuals	25-Nov-11	07-									25-Nov-11	-	-11
MFG00772.Bldg	Office Building Addition	01-Dec-10 A	17-	-10 A		_	-				_	1	7-Nov-11	
MFG00772.Bldg.DesEng	Design and Engineering	01-Dec-10 A	12-	-10 A	12-Jan-11 A									
MFG00772.Bldg.Found	Foundation	24-Dec-10 A	25- 🗸	24-Dec-10 A		25-Ma	r-11 A							
<			>	<										>

#### 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.

Customize Columns X
Available Columns   Budget   Costs   Dates   Durations   General   Number of Activities   Summary   Units

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.

Edit Column		×
Column Parame	ters	ОК
Default Title:	Activity ID	Cancel
New Title:	Activity ID	Reset to default
Width:	200 🗘	
Alignment:	Left v	

#### 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 o	defined	View the WBS UDF assignments for the selected WBS.
fields		

#### Projects view

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

							Sch	edule	leader								8 >
File Activities	WBS Projects	Resources	Assignment	OBS	Roles	Reports	Linear Schedul	ing	Project Expens	es							▲ Style ▼ (
All Projects	Gantt	Project	Outline Filte	Auto Filter Data	Group	Sort E	So to Project Calendar Financial Periods View	<b>₩</b> Мс	nth/Week	cale	+ Custom Timesci	ize Find					
-	1	10010				1	2010	I		011			2012		1	2013	
Project ID	Project Name			Start		Finish		24	01 02	03	Q4	01	02 03	04	Q1 Q2	03	Q4 (
EC00501	Haitang Corporate Par	k		01-Sep-1	0	11-Jan-13	l-Sep-10					-			11-Jan-13	-	
EC00515	City Center Office Build	ding Addition		01-Nov-1	10	03-Jul-13	01-Nov-10						_			03-Jul-13	
EC00530	Nesbid Building Expan	sion		01-Jul-11	L	17-Oct-13			01-Jul-11				_				17-Oct-13
C00610	Harbour Pointe Assiste	d Living Cent	er	01-Sep-1	0	24-Sep-14	l-Sep-10										
C00620	Juniper Nursing Home			01-Nov-1	10	08-Jan-14	01-Nov-10										08
C00630	Saratoga Senior Comn	nunity		01-Jun-1	1	05-Jan-15			01-Jun-11 💼								
MFG00189	Waterville - Automate	d System		03-Oct-1	1	19-Jul-12			0	03-Oct-11			19	Jul-12			
MFG00337	Arcadia - Automated S	ystem		01-Jul-10	)	02-May-11	.0			May-11							
MFG00497	Ravine - Plant Expansi	on & Moderni	zation	01-Sep-1	1	11-Feb-13			01-S	ep-11 💼					11-Feb-13		
MFG00659	Deerfield - Automated	System		01-Dec-1	0	17-Aug-11	01-Dec-10			1	7-Aug-11						
VFG00772	Cordova - Plant Expans	ion & Moderr	nization	01-Dec-1	0	30-May-12	01-Dec-10						30-May-	12			
VFG00925	Melrose - Plant Expans	ion & Modern	nization	01-Jul-10	)	13-Jan-12	.0					13-Jan-1	2				
RG00800	Sunset Gorge - Routin	e Maintenanc	e Work	01-Nov-1	10	31-Dec-10	01-Nov-10		31-Dec-10								
RG00820	Johnstown - Routine N			18-May-	11	12-Jul-11			18-May-11	12-Jul							
RG00870	Baytown, TX - Offline I		Work	01-Aug-1		15-Sep-11			01-Aug-		15-Sep-11						
RG00910	Driftwood - Refuel Out			01-Dec-1		16-Jun-11	01-Dec-10	' 💻		16-Jun-1	.1						
IRG00940	Sillersville - Refuel Ou			03-Oct-1		24-Jan-12				03-Oct-11		24-Jan-	12				
NRG00950	Red River - Refuel Out	age		01-Mar-1	11	27-Aug-11		D1-Ma	-11		27-Aug-11						

## 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.
<b>Financial Periods</b>	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.

Customize Columns	×
Available Columns         Baseline       •         Budget       •         Costs       •         Dates       •         Durations       •         General       •         Number of Activities       •         Project Codes       •         Summary       •         Units       •	Inserted Columns          Project ID         Project Name         Start         Finish         Data Date
	Edit Column Close

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.

Edit Column	×
Column Parameters OK	
Default Title: Activity ID Cancel	
New Title: Activity ID Reset to defa	ult
Width: 200	
Alignment: Left 🗸	

#### 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.

÷									Schedule	Reader
File Activities	WBS	Projects	Resourc	tes As	ignments	OBS	Roles	Reports	Linear Scheduling	Project Expens
Default Resources	Ŧ	Details Panes	Resource Table	Outline Data			Find Find			
Resource ID	Resourc	e Name		Resource Ty	pe	Primary Role	e		E-Mail Address	
SMng	Site Mar			Labor		Site Manage	er	1/d	manager@ec.com	
Siding		ontractor		Labor				1/d		
Surveyor	Land Su			Labor				1/d		
Roof	Roofing			Labor				1/d		
Eng	HVAC Er			Labor		Engineer		1/d		
<ul> <li>E&amp;C Resources</li> </ul>	E&C Res	sources		Labor				1/d		
<ul> <li>Subcontractors</li> </ul>	Subcont			Labor				1/d		
Drywall		Subcontrac	tors	Labor				1/d		
<ul> <li>Trades</li> </ul>	Trades			Labor				1/d		
FCarp	Finish C			Labor		Trades		1/d		
RCarp	Rough C			Labor		Trades		1/d		
Plumb	Plumber	r		Labor		Trades		1/d		
GenLabor		-Constructo		Labor		Trades		1/d		
Operator	Operato	r		Labor		Trades		1/d		
Elec	Electrici			Labor		Trades		1/d		
✓ Dev	Develop			Labor		Developmen		1/d		
Jun	Junior D			Labor		Developmen		1/d		_
Sen		Developer		Labor		Developmen		1/d		
QA	QA			Labor		Developmen		1/d		_
Proj Man	Project I	Manager		Labor		Managemer	nt	1/d		
General				Reso	urce ID: Ele	c			Resource Nar	me: Electrician
Codes			Roc	ource Notes						
Notes			res	ource notes						

#### 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.				
<b>Details</b> 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.				
<b>Collapse All</b> Collapses all expanded items in a hierarchical table view.					
Calendar	View details for assigned global, project and resource calendars.				
<b>Resource Shifts</b> 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.

Customize Columns		×
Available Columns General Resource Codes	Passursa Nama	<
	Edit Column	Close

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.

Edit Column		×
Column Parame	ters	OK
Default Title:	Activity ID	Cancel
New Title:	Activity ID	Reset to default
Width:	200 🔹	
Alignment:	Left 🗸	

#### 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	View the resource UDF assignments for the selected resource
fields		

#### 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.

÷		Pro	oject Everything.xe	r - ScheduleReader					Assi	Inments						-	₽ ×
File Activities WBS	Projects Re	sources	Assignments	OBS Roles	Reports	Linear Sche	duling Project Exp	enses	Progre	s Update						^	Style 🔹 ?
Default Resource Assignmen 👻	Details		Table	Outline	Auto Filter Data	Group Sort	Go to Activity Calendar Financial Periods	++++ Mor	nth/Wee	Timescale	+						
						•				Mar	05						Mar 12
Activity Name	Start	Finish	Original Duration						М	T W		F	S	S	М	Т	W
✓ Site Manager	08-Mar-17	04-May-17		0		Budgeted Uni				0	0	0			0	0	0
Project Management	08-Mar-17	04-May-17		0	_	Budgeted Uni				0	0	0			0	0	0
✓ Siding Contractor	08-Mar-17	10-Mar-17		0	_	Budgeted Uni				2	2	2					
Install sidings	08-Mar-17	10-Mar-17		0	_	Budgeted Uni				2	2	2					
✓ Land Surveyor	08-Mar-17	09-Mar-17		0		Budgeted Uni				3	3						
Survey and mark out size	08-Mar-17	09-Mar-17		0		Budgeted Uni				3	3						_
✓ Roofing	08-Mar-17	09-Mar-17		0		Budgeted Uni				3	3						
Install paper and shingles	08-Mar-17	09-Mar-17		0		Budgeted Uni				3	3						
✓ HVAC Engineer	08-Mar-17	09-Mar-17	2	0		Budgeted Uni	ts			8	3						
Install HVAC Ducting	08-Mar-17	09-Mar-17	2	0		Budgeted Uni	ts			3	3						
Install HVAC Unit	08-Mar-17	08-Mar-17	1	0		Budgeted Uni	ts			5							
Drywall Subcontractors	08-Mar-17	15-Mar-17	6	0		Budgeted Uni	ts			3	3	3			1	1	1
Rock walls and ceilings	08-Mar-17	10-Mar-17	3	0		Budgeted Uni	ts			2	2	2					
Tape and mud walls and ceilings	08-Mar-17	15-Mar-17	6	0		Budgeted Uni	ts			1	1	1			1	1	1
✓ Finish Carpenter	08-Mar-17	14-Mar-17	5	0		Budgeted Uni	ts			8	8	3			1	1	
Instal doors	08-Mar-17	09-Mar-17	2	0		Budgeted Uni	ts			3	3						
Install kitchen cabinets	08-Mar-17	14-Mar-17	5	0		Budgeted Uni	ts			1	1	1			1	1	
Door casing and baseboards	08-Mar-17	10-Mar-17	3	0		Budgeted Uni	ts			2	2	2					
Install windows	08-Mar-17	09-Mar-17	2	0		Budgeted Uni	ts			3	3						
✓ Rough Carpenter	08-Mar-17	15-Mar-17	6	0		Budgeted Uni	ts			15	10	2			2	1	1
Install foundations forms	08-Mar-17	09-Mar-17	2	0	_	Budgeted Uni	ts			3	3						
Erect exterior wall frames	08-Mar-17	15-Mar-17	6	0		Budgeted Uni	ts			1	1	1			1	1	1
Erect interior stud walls	08-Mar-17	13-Mar-17	4	0		Budgeted Uni	ts			1	1	1			1		
Install OBS exterior cladding	08-Mar-17	09-Mar-17	2	0		Budgeted Uni	ts			3	3						
Install trussess	08-Mar-17	09-Mar-17	2	0		Budgeted Uni	ts			3	3						
Install roof sheeting	08-Mar-17	08-Mar-17	1	0		Budgeted Uni	ts			5							
✓ Plumber	08-Mar-17	13-Mar-17	4	0		Budgeted Uni				6	1	1			1		(and a second se
Install slab plumbing	08-Mar-17	08-Mar-17	1	0		Budgeted Uni				5							
Install rough plumbing lines	08-Mar-17		4	0		Budgeted Uni				1	1	1			1		
V Laborer Constructor	09 Mar 17	00 Mar 17	2	0		Rudrated Lini				13	9						
<					>	٢											>

#### 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.

Customize Columns	×
Available Columns       Inserted Columns         Costs       •         Dates       •         Durations       •         General       •         Percent Completes       •         Units       • <b>C</b> •         Edit Columns       •	mn Close

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.

Edit Column		×
Column Parame	eters	ОК
Default Title:	Activity ID	Cancel
New Title:	Activity ID	Reset to default
Width:	200 🚖	
Alignment:	Left v	

#### 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.

Customize Columns			×
Available Columns         Cumulative - Costs <ul> <li>Cumulative - Units</li> <li>Time Interval - Costs</li> <li>Time Interval - Units</li> </ul>	> <	Inserted Columns Budgeted Units	×
			lose

## 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 fields	defined	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.

÷		ScheduleReader	- 8 ×
File Activities WBS Projects Reso	ources Assignments OBS Roles Report	Linear Scheduling Project Expenses	▲ Style ▼ ?
Details Outline			
Panes Data Calendar OBS Name			
V Enterprise		_	
Devision A Manager			
✓ Level A1 Manager			
<ul> <li>Level A2 Manager</li> </ul>			
Team Leader			
<ul> <li>Devision B Manager</li> </ul>			
✓ Level B1 Manager			
Level B1.1 Manager			
<ul> <li>Devision C Manager</li> <li>Level C1 Manager</li> </ul>			
Level CI Manager			
General	OBS Name: Level B1.1 Manager	OBS Description:	
Responsibility	Project ID / WBS Code	Project Name / WBS Name	
E		Plumbing	

## OBS tab

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

Details	cails Show on bottom project information details for selected OBS element.							
<b>Expand All</b> Expands all collapsed items in a hierarchical table view.								
Collapse AllCollapses 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.

÷						Schedu	leReader		- 8	×
File Activities	WBS Proj	ects Resources	Assignments	OBS Roles	Reports	Linear Scheduling	Project Expenses		▲ Styl	- ?
	Calendar Financial Perioc	5								
Role ID	Caleriuar	Role	Name			1				
✓ E&C			Roles							
Trades		Trade								
ENG			neer							
SMNG		Site	Manager							
General			Role ID: EN	G		Role N	ame: Engineer			
Resources		Rate Typ	De .	Price / U	nit					
		Price / U		\$1,000.0						
Limits		Price / U		\$1,200.0						
		Price / U		\$1,500.0						
		Price / U		\$2,000.0						
		Price / U	Init5	\$2,500.0	0/h					

#### 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.							
<b>Expand All</b> 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.

#### ScheduleReader™

Ŧ					Project Everything.xer - Scl	eduleReader _ & ×
File Activities	WPC Decisete	Deseurces Assisten	ents OBS Roles	Departs Linear	cheduling Project Expenses	∧ Style ▼
Default Project Exp		Project Table	ents Obs Koles	Reports Linear 3	eneouing Project expenses	∽ siye ∙
Expense Item	Expense Category	WBS	Cost Account	Vendor		
A1	Software	PC0011-1.PM.1	00100			
A2	Materials	PC0011-1.PM.1	00200			
A3	Facilities	PC0011-1.PM.1	00400			
(New Expense Item)	Training	PC0011-1.PM.1				
121	Travel	PC0011-1.PM.1				
81	Equipment	PC0011-1.PM.2	00800			
(New Expense Item)	Software	PC0011-1.PM.2	00700			
B3		PC0011-1.PM.2				
B4		PC0011-1.PM.2				
C1		PC0011-1.PM.3				
C2		PC0011-1.PM.3				
D1		PC0011-1.PM.4			-	
EF		PC0011-1.PM.4.1				
DS		PC0011-1.PM.4.1				
(New Expense Item)		PC0011-1.PM.4.1			_	
(New Expense Item)		PC0011-1.PM.4.1.2			-	
DSA		PC0011-1.PM.4.1.2			-	
Q2		PC0011-1.PM.4.1.2				
(New Expense Item)		PC0011-1.PM.4.1.1			-	
(New Expense Item)		PC0011-1.PM.4.1.1				
(New Expense Item)		PC0011-1.PM.4.3			-	
General		Exper	nse item: B1		Expense Description:	
Activity			ed Units: 1.00		Actual Units:	
Costs			ce / Unit: \$397.00		Remaining Units:	
Description			ted Cost: \$397.00		At Completion Units: Unit of Measure:	1.01
User Defined Fields			Remaining Cost: \$0.00			
		At Complet	ion Cost: \$400.00			

# 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.

Customize Columns					×
Available Columns Costs General Units	* *	▲	Inserted Columns Activity ID Activity Name Actual Cost	Edit Column	► ►
					in the second se

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.

Edit Column		×
Column Parame	ters	ОК
Default Title:	Activity ID	Cancel
New Title:	Activity ID	Reset to default
Width:	200	
Alignment:	Left ~	

#### 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.

Ŧ										CN	C45-LS	.xer - ScheduleRea	der _ Ə ×
File	e A	ctivities	WBS	Projects	Reso	urces	Assignmer	nts OBS	Role	s Repo	rts	Linear Schedulin	ig Project Expenses * Style * ?
C Custo	ustomize Codes omize Coo			Default Layo ayout	ut *		1					2011	2012
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr Ma	ay	Jun Jul	Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Au
8							PP-101 Ac	tivity Num. 6					
130						PP-101		•					
<b>195</b>		PP-101 A	ctivity Num	. 35					<b></b>				PP-101 Activity Num. 27
260						PP-101 #	•	•	<b></b>				
325						PP.							PP-101 Activity Num. 28
300													PP-101 Activity Num. 29
^ 455						PP			<b></b>				, · · · · · · · · · · · · · · · · · · ·

# 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.

						ScheduleReader		- 8	
Acti	ivities WBS Proje	cts Re	esources	Assignme	ents OBS Roles Report	s Linear Scheduling Proj	ect Expenses		▲ Style ▼
14 Activ s ▼ Brief	rity WBS Project Custon	Report	Edit Report n Reports	U Filters Hie	Show grand totals ble Format	ings			
ID	Metric	Boro	Details	Pass	DCMA 14				
1	Logic	6.06	8 act.	0			ef overview of 14 project categ ces or analyze the Critical Path	ories that determines the project	's finish date. See how project
2	Leads	11.11	<u>24 rel.</u>	0	activities are scheduled, which	in activities are missing resour	ces of analyze the childar Path	Length muex.	
3	Lags	12.96	<u>28 rel.</u>	0					
4	Relationship	84.26	<u>182 rel.</u>	0	Logic	Leads	Lags	Relationship	Hard Constraints
5	Hard Constraints	0.00	<u>0 act.</u>	$\odot$					
6	High Float/Slack	65.15	<u>86 act.</u>	0					
7	Negative Float/Slack	0.00	<u>0 act.</u>	$\oslash$					
8	High Duration	40.91	<u>54 act.</u>	0	High Float/Slack	Negative Float/Slack	High Duration	Invalid Forecast Dates	Invalid Actual Dates
9_1	Invalid Forecast Da	0.00	<u>0 dates</u>	$\odot$					
9_2	Invalid Actual Dates	0.00	<u>0 dates</u>	$\odot$					
10	Resources	88.64	<u>117 act.</u>	$\odot$					
11	Missed Tasks	14.39	<u>19 act.</u>	0	Resources	Missed Tasks	Critical Path	CPLI	BEI
12	Critical Path	100.00	0 act.	$\oslash$					
13	CPLI	0.00	0 act.	0					
14	BEI	12.58	19 act.	0					

# 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 o 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.					

User Manual

# Progress Update

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

	Harbour Pointe Assisted Living	Center - Grand Total.x	er - ScheduleReader					Acti	<i>v</i> ities				- 8	
File Activities	WBS Projects Res	ources Assignmen	nts OBS Role	Reports	Line	ar Scheduling	Project Expenses	Progress Upda	te Format				▲ Style	le 🔭
Progress pdate Mode			Delete Restore Er ty Activity Activity Act		ighlight									
tivity ID	Activity Name	Activity Status	Activity % Complete	Start	^	March 2010	5 20 27	April 2 03 10	016	01	May 2016 08 15	22	29 05	_
Home Construction				21-Mar-16		00 15	20 2/	05 10	1/ 24	UI	08 15		29 05 6 Home Co	-
A1010	Project Management	In Progress	0%	21-Mar-16 A		21-Mar-16 A						23-May-1	6 Site Mana	ager
A1000	Project Start	Completed	100%	21-Mar-16 A		-	Project Start							
A1020	Project Complete	In Progress	0%	1							≪ <del>n ((rpj</del>	ect Complete		
Grading				21-Mar-16			P	07-Apr-16	Grading					
A1030	Survey and mark out site	Completed	100%	21-Mar-16 A		1	» <sup>[</sup>	07-Apr-16	Land Surveyor					
A1040	Grade site	Completed	100%	23-Mar-16 A			▶ <mark>□ 25</mark> Mar-16	A Operator						
Foundation				30-Mar-16			P		4	26-Apr-16 Found	ation			
A1050	Install fondation forms	Completed	100%	30-Mar-16 A			L L			26-Apr-16 A Rou	gh Carpenter, Lai	borer-Constru	tion	
A1060	Install slab plumbing	In Progress	0%	01-Apr-16 A			01-Apr-16 A		4-Apr-16 Plum	ber				
A1070	Pour and float slab concrete	In Progress	0%	04-Apr-16 A			04-Apr-16 A	12-/	pr-16 Laborer-	Construction				
Structure				14-Apr-16				P			1	23-May-:	6 Structure	-
Structure Framing				14-Apr-16 14-Apr-16				p p			<b>1</b> 1-May-16	23-May- Framing	6 Structure	-
	Erect exterior wall frames	In Progress	0%					14-Apr-16 A		03-May	11-May-16 -16 Rough Carp	Framing	.6 Structure	-
✓ Framing	Erect exterior wall frames Erect interior stud walls	In Progress In Progress	0%	14-Apr-16					r-16 A	03-May	-16 Rough Carp	Framing		-
Framing A1080		In Progress	1	14-Apr-16 14-Apr-16 A				22-Ap	r-16 A		-16 Rough Carp	Framing enter Rough Carper		
Framing A1080 A1090	Erect interior stud walls	In Progress	0%	<b>14-Apr-16</b> 14-Apr-16 A 22-Apr-16 A				22-Ap		05-N	-16 Rough Carp 11-May-16	Framing enter Rough Carper arpenter		
Framing A1080 A1090 A1100	Erect interior stud walls	In Progress	0%	14-Apr-16 14-Apr-16 A 22-Apr-16 A 22-Apr-16 A				22-Ap 22-Ap		05-M	-16 Rough Carp 11-May-16 Iay-16 Rough Ci	Framing enter Rough Carper arpenter		
Framing A1080 A1090 A1100 Roof	Erect interior stud walls Install OSB exterior cladding	In Progress In Progress	0% 0%	14-Apr-16 14-Apr-16 A 22-Apr-16 A 22-Apr-16 A 22-Apr-16				22-Ap 22-Ap 22-Ap	r-16 A •	05-M	-16 Rough Carp 11-May-16 May-16 Rough C 09-May-16 Ro	Framing enter Rough Carper arpenter lof arpenter		
<ul> <li>▶ Framing</li> <li>A1080</li> <li>A1090</li> <li>A1100</li> <li>▶ Roof</li> <li>A1110</li> <li>A1120</li> <li>A1130</li> </ul>	Erect interior stud walls Install OSB exterior cladding Install trusses	In Progress In Progress In Progress	0% 0%	14-Apr-16 14-Apr-15 A 22-Apr-16 A 22-Apr-16 A 22-Apr-16 A 22-Apr-16 A				22-Ap 22-Ap 22-Ap	r-16 A <b>*</b>	05-M	-16 Rough Carp 11-May-15 Iay-16 Rough C 09-May-16 Ro Iay-16 Rough C	Framing enter Rough Carper arpenter of arpenter enter		
<ul> <li>▶ Framing</li> <li>A1080</li> <li>A1090</li> <li>A1000</li> <li>▼ Roof</li> <li>A1110</li> <li>A1120</li> </ul>	Erect interior stud walls Install OSB exterior cladding Install trusses Install roof sheeting	In Progress In Progress In Progress In Progress In Progress	0% 0% 0% 0%	14-Apr-16 A 14-Apr-16 A 22-Apr-16 A 22-Apr-16 A 22-Apr-16 A 22-Apr-16 A				22-Ap 22-Ap 22-Ap	r-16 A >	05-M	-16 Rough Carp 11-May-16 Iay-16 Rough C 09-May-16 Ro Iay-16 Rough C 16 Rough Carp	Framing enter Rough Carper arpenter of arpenter enter ofing		

# 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.
<b>Delete Activity</b>	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.

	Harbour Pointe Assisted Living	Center - Grand Total	er - ScheduleReader																ð i
File Activities	WBS Projects Re	ources Assignme	nts OBS Ri	oles Reports	Linear 9	Scheduling	Pro	oject Expe	nses	Progre	ss Update	Form	at					<b>^</b> :	Style 📍
Relation:	ship Lines Number Of Predece	ssor Levels 2 🗘 🤤	Zoom In		Resource	Resou	urces Tab	le											
🔲 🖃 Hide Bar	Labels Number Of Success	ors Levels 2 💲 🧲	Zoom Out	💷 🔿 Ву	Role	Roles	Table												
Bars	Box Style Activity		Reso	urce Usage ile Options															
Gantt		Trace Logic	gregend proti		ce Usage Pr	ofile													
		-			lary 2016	onne			March 201	6			April	2016			Ma	y 2016	
tivity ID	Activity Name	Activity Status	Activity % Complet	te Start	14	21	28	06	13	20	27	03	10	17	24	01	08	15	22
Iome Construction				21-Mar-16						· —									<b>Q</b> 23
A1010	Project Management	In Progress	0%	21-Mar-16				21	-Mar-16 A	•									23
A1000	Project Start	Completed	100%	21-Mar-16						🔶 Proj	ect Start								
A1020	Project Complete	Not Started	0%															<b>⇔</b> ¶re	<del>ject</del> Co
Grading				21-Mar-16								۹ (	7-Apr-16	Grading				]	
	Survey and mark out site	Completed		21-Mar-16						•			7-Apr-16	A Land S	urveyor				
A1040	Grade site	Completed	100%	23-Mar-16						⊾	⊢ <del>25</del> Mar-1	6 A Opera	ator						
Foundation				30-Mar-16							P				<b>1</b> 26-	Apr-16 Fou	indation		
A1050	Install fondation forms	Completed	100%	30-Mar-16							_ l≠⊫				26-	Apr-16 A R	ough Carp	enter, L	borer-
A1060	Install slab plumbing	In Progress	0%	01-Apr-16 /						01-A	Apr-16 A 🛏			14-Apr-16	Plumber			- 1	
A1070	Pour and float slab concrete	In Progress	0%	04-Apr-16							04-Apr-16	•	12-	Apr-16 L	aborer-Con	struction			
Structure				14-Apr-16									p=			-			2
✓ Framing				14-Apr-16									p=			-	11-	May-16	Frami
A1080	Erect exterior wall frames	In Progress	0%	14-Apr-16								14-Apr-	16 A D			03-M	ay-16 Ro	ough Car	penter
A1090	Erect interior stud walls	In Progress	0%	22-Apr-16									22-A	or-16 🗚			11-	May-16	Rough
A1100	Install OSB exterior cladding	In Progress	0%	22-Apr-16									22-A	or-16 A +C		05	-May-16	Rough	arpent
✓ Roof		_		22-Apr-16										P		_	= 09-Ma	y-16 R	oof
A1110	Install trusses	In Progress	0%	22-Apr-16									22-A	or-16 A 🖊		05	-May-16	Rough	arpenti
A1120	Install roof sheeting	In Progress	0%	26-Apr-16 / V										26-Apr-16	5 A+	03-M	ay-16 Ro	ough Can	enter
				>	<														,
	1000	A1030			A1040					A1050					A1060				
F	Project Start	Survey	and mark out site		Grade sit	e				Install f	fondation fo	orms			Install sl	ab plumbing			
1				· · · · ·			1			1									
( 2	1-Mar-16	21-Mar	-16 22-Mar-16		23-Mar-1	6 27-M	ar-16			30-Mar	-16 31-	Mar-16			01-Apr-1	6 01-A	or-16		
(°			10 12 110 10	·	(20 1101 2	27 111	01 10			(Se mai	10 01	11101 20	·		(or opt a	0 01 0	. 10		
_																			

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
<b>Relationship lines</b>	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.

<b>Resource Table</b>	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.

Trace Logic Box	Legend		×
Planned Dates			~
	Activity ID		
	Activity Name		-
	Planned Start	Planned Finish	_
		OK	Cancel

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.

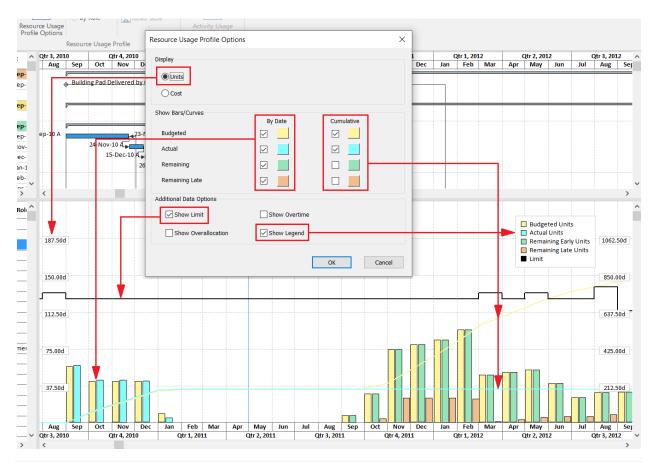


Once the color is changed, it will be applied both on the bar and curve.

#### 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;

#### ScheduleReader™



# 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	Opens a dialog in which the user can select whether units or costs will be
Profile options	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.

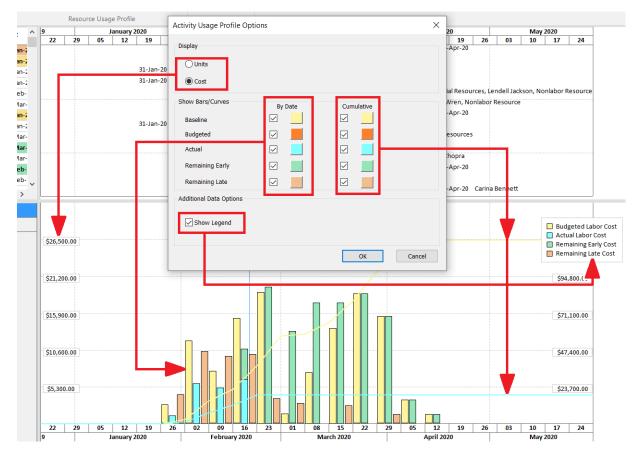
To change the bar's color, you have to click on the colored box next to the feature's name. In the newly opened dialog, you can choose one from the default colors or to create your own, custom color.



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.

Dis	splay	Name	Timescale	Start Date	End Date	Filter	Preview	
	$\checkmark$	Remaining Level of Effort	Remaining Bar	Remaining Early	Remaining Early	Level of Effort		_
	~	(New Bar)	Current Bar	Start	Finish	All Activities		
	$\checkmark$	Actual Level of Effort	Actual Bar	Actual Start	Actual Progress	Level of Effort		
	$\checkmark$	Project Baseline	Project Baseline	BL Project Start	<b>BL Project Finish</b>	Normal		
	$\checkmark$	Primary Baseline	Primary Baseline	BL1 Start	BL1 Finish	Normal		_
	$\checkmark$	Second Baseline	Secondary Bas	BL2 Start	BL2 Finish	Normal		_
	$\checkmark$	Third Baseline	Tertiary Baselin	BL3 Start	BL3 Finish	Normal		
	$\checkmark$	Actual Work	Actual Bar	Actual Start	Actual Progress	Normal		
	$\checkmark$	Remaining Work	Remaining Bar	Remaining Early	Remaining Early	Normal		
	$\checkmark$	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		$\Box$
	$\checkmark$	Baseline Milestone	Primary Baseline	BL1 Start	BL1 Finish	Milestone	•	
	$\checkmark$	Project Baseline Milestone	Project Baseline	BL Project Start	<b>BL Project Finish</b>	Milestone	٥	0

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 <i>User Dates</i> option from Timescale's drop-down list is selected.
End Date	The finishing point of the bar. This field is editable only if the <i>User Dates</i> option from Timescale's drop-down list is selected.

<b>Preview</b> The visual look of the har	Filter	Apply the filtering criteria for presenting the bars in the Gantt Chart.
rieview me visual look of the bal.	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.

Bar Style Shape Color Bar Labels		Row 1	Show bar for grouping bands
Position Right	Label 2010-09-01: Eamed Value Cost		
Add Label Remov	ve Label		

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.

	Name	Timescale	Start Date	End Date	Filter	Preview	^	Add
~	Remaining Level of Effort	Remaining Bar	Remaining Early	Remaining Early	Level of Effort	-		
$\checkmark$	Actual Level of Effort	Actual Bar	Actual Start	Actual Progress	Level of Effort		_	Delete
$\checkmark$	Project Baseline	Project Baseline	BL Project Start	BL Project Finish	Normal			Move Up
$\checkmark$	Primary Baseline	Primary Baselin	BL1 Start	BL1 Finish	Normal		_	nove op
$\checkmark$	Second Baseline	Secondary Bas	BL2 Start	BL2 Finish	Normal		_	Move Down
$\checkmark$	Third Baseline	Tertiary Baselin	BL3 Start	BL3 Finish	Normal		_	
$\checkmark$	Actual Work	Actual Bar	Actual Start	Actual Progress	Normal			
$\checkmark$	Remaining Work	Remaining Bar	Remaining Early	Remaining Early	Normal and Non-criti			Reset To Defaul
$\checkmark$	Critical Remaining Work	Remaining Bar	Remaining Early	Remaining Early	Normal and Critical			
	Start Constraint	Remaining Bar	Remaining Early	Remaining Early	Has Start Constraint			
	Finish Constraint	Remaining Bar	Remaining Early	Remaining Early	Has Finish Constraint			
$\checkmark$	Baseline Milestone	Primary Baselin	BL1 Start	BL1 Finish	Milestone	•	•	
$\checkmark$	Project Baseline Milestone	Project Baseline	BL Project Start	<b>BL Project Finish</b>	Milestone	<b>♦</b>	<b>♦</b>	
$\checkmark$	Secondary Baseline Milestone	Secondary Bas	BL2 Start	BL2 Finish	Milestone	٠	♦ ♥	
Shape			~ R	ow 1 💌	Show bar fo		5	
Color ar Labels								
	on Labe	4						

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:

-	ars	Tr 7- St 4	orporate ades - 5 Day Wor andard 5 - 10hr Da	Day Wor kweek Day Wor ys Work	'kweek 'kweek week	ne	×
Calendar	Name	С	orporate	- Standa	rd Full Tir		
<			April 201	7		>	Work hours
Sun	Mon	Tue	Wed	Thr	Fri	Sat	00-:30 :30-:60
						1	
2	3	4	5	6	7	8	
9	10	11	12	13	14	15	6
16	17	18	19	20	21	22	8 9 10
23	24	25	26	27	28	29	
30							14 15
Stand		[ nd excep	Nonwo			xception	16       17       18       19       20       21       22       23
Time Pe	riods	Workw	eek				ОК

- 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.

Time Periods			×
Hours per Time Period Hours/Day 8.0	Hours/Week	Hours/Month 172.0	Hours/Year 2000.0
			ОК

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

Workweek				×
Calendar Weekly Hours				
Day of the Week		Work h :00-:30	ours :30-:60	]
Sunday Monday Tuesday Wednesday Thursday Friday Saturday	0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 9 20 21 22 23			
			ОК	

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.

Customize Timescale	×
Timescale Options Labels	
Timescale Start PS - E	Earliest Project Start
Date Format	
Show Primary Dates	
Туре	Calendar ~
Date Interval	Calendar Week of Year
Show Ordinal Dates	
Ordinal Start	PS - Earliest Project Start
Ordinal Date Interval	Year 🗸
	OK Cancel

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:

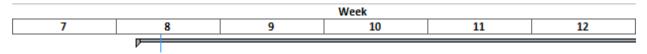
• Show Primary dates ("Calendar" Type) - Changing the date interval in the timescale, the user will be able to view different activity information.

		N	1ar	20					N	lar 2	27					A	\pr (	3					A	pr 1	0					A	pr 1	7
S	M	Τ	W	Τ	F	S	S	Μ	Τ	W	Τ	F	S	S	Μ	Τ	W	Τ	F	S	S	Μ	Τ	W	Τ	F	S	S	Μ	Τ	W	Τ
	P					_		-					_		-					_		-					_		_			

• 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.

Novem	ber 2010			De	cember 20	10			January	2011		
W45	W46	W47	W48	W49	W50	W51	W52	W1	W2	W3	W4	W5

• 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.

Customize Timescale	×
Timescale Options Labels	
Timescale Labels	
Year Label:	(1, 2, 3,) ~
Quarter Label:	1, 2, 3, 🗸
Month Label:	1, 2, 3, 🗸
Week Label:	1, 2, 3, ∨
	OK Cancel

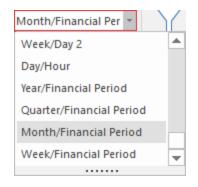
#### PRESENT FINANCIAL PERIODS

"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.

So to Activity Hide Empty Groups	🔛 Calendar 🗳 Financial Periods	₩ Month/Financial Per ▼ +	Filter Auto Filter	ロ Group îl Sort
View	Calendar	Timescale	Filter	Group
mber 2017		mber 2017	Januar	y 2018
	WEEK 1 WEE		-Dec-17	
01-De	c-17 A	28-1	Dec-17 Concrete F	inisher
01-De	c-17 A	29	-Dec-17 Operator	

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.

WEEK 1         12/1/2017         12/7/2017           WEEK 2         12/8/2017         12/14/2017	Name	Start Date	End Date
WEEK 2 12/0/2017 12/14/2017			
	WEENZ	12/0/201/	12/14/2017

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.

Customize Columns		×
Available Columns          Financial Period Value         WEEK 1: Actual Expense Cost         WEEK 1: Actual Material Cost         WEEK 1: Actual Nonlabor Cost         WEEK 1: Actual Nonlabor Units         WEEK 1: Earned Value Cost         WEEK 1: Earned Value Labor Units         WEEK 1: Planned Value Labor Units         WEEK 1: Planned Value Labor Units         WEEK 2: Actual Expense Cost         WEEK 2: Actual Material Cost         WEEK 2: Actual Nonlabor Cost         WEEK 2: Actual Nonlabor Units         WEEK 2: Actual Nonlabor Cost         WEEK 2: Actual Nonlabor Cost         WEEK 2: Actual Nonlabor Cost         WEEK 2: Actual Nonlabor Units         WEEK 2: Actual Nonlabor Cost         WEEK 2: Actual Nonlabor Cost         WEEK 2: Actual Nonlabor Cost         WEEK 2: Actual Nonlabor Units         WEEK 2: Earned Value Cost	<ul> <li>Inserted Columns</li> <li>Activity Name         WEEK 1: Actual Labor Cost         WEEK 2: Actual Labor Units         WEEK 2: Actual Labor Units     </li> </ul>	✓

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.

÷		Expe	enses.xer - Schedule	eReader					Activitie	s			-	- Ø	×
File Activities WBS	Projects R	esources Assigr	nments OBS	Roles Rep	orts Linear	Scheduling	Project Expe	nses P	Progress Update	Format				▲ Style	- ?
Default Activities	Gantt Bottom Vi Details	ew •	Activity Activity	cessors	ses Outline	Filter Au Fil	to Group S	U 🗐	Go to Activity Calendar Financial Periods View	+++ Quarter	/Month Timescale	+ Customize Timescale	Find Find		
Activity Name	WEE WEE	K 1: Actual Labor Cost	t WEEK 1: Act	ual Labor Units	WEEK 2: Actua	I Labor Cost	WEEK 2: Actual L	abor Units	lovember 2017	,		ember 2017			Janu
✓ Financial Period Project											WEEK 1 WE	EK 2	<b>1</b> 29	-Dec-17	
Building PAD include UG Units	€110	,008.90	344		€96,807.84		303			01-Dec-17 A			28-	Dec-17 (	Concrete
First Floor Masonry Structure	€91,0	041.85	275		€91,041.85		275			01-Dec-17 A			29	-Dec-17	Operato
General		Acti	ivity: A1010			Activity !	lame: First Floo	r Masonry S	< structure						>
Status		Resource Name	Rema	ining Units / Ti	Original Lag	Budget	ed Units	Actual Units	Actual Reg	zular Units F	Remaining Units	Actual Cost			٦
Resources		Operator	16/d		0	1238		550	550		88	€182,083.70			
Relationships															
Codes															
Notebook															
Steps															
Feedback															
Expenses															

# 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.

				Project Every	thing.xer - S	cheduleRea	der							Ac	tivities	5									Ð
File	Activities WBS	Projects	Resources	Assignme	nts OB	S Roles	Reports	Li	near Schedu	ling	Project E	xpenses	Pr	ogress Upo	date	Form	at							^ s	tyle 🔻
	Default Activities -	Gant	t om View		🖶 📻 Pre	decessors	Expenses	Gutlin	Filter	Auto		Ĵ↓ Sort	_	) to Activity lendar		₩ Mor	ith/Week	k		¥	Cust		Find		
	Default Activities	)etails		* AC	tivity 🔤 Su	cessors		Jutin	ie Filter	Filter	Group	SOIL	💲 Fir	nancial Peri	ods		}			- +		scale	Find		
	Grouped by Finish Monthly		Panes			Table				Data				View				Tim	escale				Find		
i۱	Grouped by Finish Weekly	ctivity	Vame		Start		<b>V</b> Finish	^	Octobe	er 2019				November	2019				Dece	ember 2	2019				Jan
2	Grouped by Primary Resource								06 1	13 2	) :	27	03	10	17	24	01		08	15	;	22	29 -Dec-19	05	
	Grouped by Start Monthly				22-Oct		26-Dec-			P=													-Dec-19		
					22-Oct 22-Oct		26-Dec-		22-00	ct-19 A		i i	07	-Nov-19								-1 20	000 15		
п.	Grouped by Start Weekly	roject N roject S	lanagement		22-0ct		07-Nov-		22.00		Project St	tart		1107 15											
	Grouped by WBS path	roject S			22-00	-19 A	24-Dec-			7	, roject of											Proje	ct Finish		
	Project Schedule	roject r	mish		22-Oct	10	09-Dec-												1 09-D	ec-19	f				
1	Activity Dates	10.01.01	nd mark out site		22-0ct		28-Oct-		22-00	ct-19 A		28-Oct-19	A Lor	i McNeil											
	Costs - Actuals	irade sit			22-0ct		14-Nov-				-19 A				Nov-19	Rea Jo	hnson								
			e float slab concret		25-0ct		26-Nov-					Nov-19 A	-1				5-Nov-19	Ben	Frost						
	Costs - At Completition		ab plumbing		06-Nov		27-Nov-					Nov-19 A					27-Nov-1	9 Pet	ter Coo	per					
	Costs - Budgeted		ndation forms		28-Nov		09-Dec-								28-N	lov-19			09-D	ec-19	Michel	le Peter	on		
	Deadlines	Stanro			22-Oct		03-Dec-			n=						-	(	03-Dec	-19						
	Expenses	rect ext	erior wall frames		22-0ct		20-Nov-		22-00	ct-19 A 📕		1			2	0-Nov-19	Wayne	Presc	ott						
	Percent Complete		B exterior claddi		22-Oct		12-Nov-		22-00	ct-19 A 🗖		1		12-No	v-19 I	Frank Chu									
			per and shingles		28-Oct		27-Nov-			28-Oct-	19 A 🖌		-				27-Nov-1	9 Ga	ry Mar	shall					
	Progress Update		erior stud walls		05-Nov		03-Dec-				05-N	ov-19 A 🙀					(	03-Dec	-19 J	udy Bill	ings				
v	Structure				22-Oct		26-Nov-			P			_			2	5-Nov-19								
	A1090	install tru	ISSES		22-Oct		26-Nov-		22-00	ct-19 A						2	5-Nov-19	Paul	Riley						
	A1100		of sheeting		22-Oct		30-Oct-		22-00	ct-19 A		30-Oct	t-19 A	Harry Shaw	1										
~	Framing				04-Nov	-19	26-Dec-					P	_								_	26	-Dec-19		
	A1110	Install HV	/AC Ducting		04-Nov		19-Nov-				04-Nov	/-19 A 💼	_		19	-Nov-19	Robert L	incoln							
	A1130		eaker box and rou	gh wire	14-Nov	-19	27-Nov-	~					14-Nov	-19	<u> </u>		27-Nov-1	.9• Ci	indy Le	e					
							>	<																	
en	eral			Activity	A1140				Act	tivity Nam	e: Projec	t Manage	ement												
ati	us			Activity Type	Level of E	fort			Activi	ity Calenda	r: Corpo	rate - Sta	ndard F	ull Time											
	ources		1 1	Duration Type			5			· · · · ·		t Manage													
-			Percent Co	omplete Type	Units				Responsib	ie Manage	r: Enter	prise													
-	tionships								Prima	ry Resource	8														
ode	5																								
ote	ebook																								

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**.

Group By	Indent	To Level	Group Interval	OK
Remaining Duration			5	
Critical				Cancel
				Delete

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**.

	Pro	ject Everythin	g.xer - ScheduleF	leader			Activi	ties			- 8	
File Activities WBS	Projects Resources	Assignments	OBS Ro	les Reports	Linear Scheduling	Project Expenses	Progress Update	Format			▲ Style	- ?
Default Activities	Gantt Destrom View		Resources	S Expenses	$ \mathbf{F}  \mathbf{Y} \mathbf{Y}$		🔁 Go to Activity	🗰 Month/Week	• 88	$\mathcal{Q}$		
	Details	<ul> <li>Activity</li> </ul>	Successors		Outline Filter Auto	Group Sort	S Financial Periods		+ Customize Timescale	Find		
Layout	Panes		Table		Data		View		imescale	Find		
Activity ID	Activity Name		Start	Finish	Resources		<b>v</b>		26			_ '
♥ 0 to 5			01-Sep-10	24-Sep-14	4				20			=
∼ No			01-Sep-10	01-Aug-1	3							-
EC1090	Building Pad Including UG Uti	ls	01-Sep-10 A	23-Nov-1	0 A Concrete Fou	ndation Subcontracto	r i					
EC1150	Building Slab Incl. UG Utils		29-Sep-10 A	27-Dec-10	0 A Concrete Fou	ndation Subcontracto	r, Proj ·		*			
EC1030	Shop Drawings, Review and A	pproval	01-Sep-10 A	12-Jan-11	LA Concrete Fou	ndation Subcontracto	r, Proj I					
EC1110	Site Electrical Work & Temp P	ower	01-Sep-10 A	21-Sep-10	0 A Electrician			trician				
EC1040	Electric to Building 4 Power V	ault	01-Sep-10 A	10-Jan-11	LA Electrician							
EC1050	Electric to Building 3 Power V	ault	01-Sep-10 A	30-Dec-10	0 A Electrician							
EC1140	First Floor Masonry Structure		24-Nov-10 A	13-Dec-10	0 A Laborer-Cons	truction						
EC1170	Second Floor Slab & Collar Be	am	15-Dec-10 A	31-Jan-11	LA Laborer-Cons	truction						
EC1190	Second Floor Masonry Structu	ire	26-Jan-11 A	22-Feb-11	1 A Laborer-Cons	truction						
EC1210	Third Floor Slab & Collar Bear	n	23-Feb-11 A	07-Apr-11	LA Laborer-Cons	truction						
EC1220	First Floor Masonry Structure		22-Dec-10 A	18-Jan-11	LA Laborer-Cons	truction						
EC1230	Second Floor Slab & Collar Be	am	12-Jan-11 A	25-Feb-11	1 A Laborer-Cons	truction						
EC1260	Second Floor Masonry Structu	re	23-Feb-11 A	22-Mar-1	1 A Laborer-Cons	truction						
EC1290	Third Floor Slab & Collar Bear	n	22-Mar-11 A	03-May-1	1 Laborer-Cons	truction						
EC1200	Roadway Pavers		11-Jan-11 A	09-May-1	1 Landscaping	Subcontractor						
EC1130	Walkways		15-Sep-10 A	04-Feb-11	1 A Landscaping	Subcontractor						
EC1000	Curbing		01-Sep-10 A	30-Dec-10	0 A Paving & Roa	dways Subcontractor						-
EC1100	Storm Drainage Site Work		01-Sep-10 A	29-Dec-10								-
EC1010	Building Pad Delivered by Ow	ner	01-Sep-10 A									
EC2140	Shell Complete			03-Aug-1	2							
EC1780	Roof Complete			25-Jan-12								
EC1420	Start Garage		27-Jun-11									
EC2400	Complete Garage			29-Apr-13	3							
EC2390	Complete Garage 1			29-Apr-13								
EC2420	Complete Building 2			01-Aug-1								
EC2020	Roof Complete			28-Feb-11								
EC2320	Shell Complete			28-Dec-12								
EC1020	Start Garage		01-Sep-10 A		-							
501020	Complete Carago			26 San 11			~	<				>

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.

ctivity ID	Activity Name	Act	tivity ID	Activity Name
Harbour Pointe Assisted Livi	ng Center	۷ŀ	larbour Pointe Assisted	Living Center
EC2430	Substantial Completic		EC2430	Substantial Co
✓ Building 1		~	Building 1	
EC2440	Complete Building 1		EC2440	Complete Buil
✓ Structure			✓ Structure	
EC1240	Third Floor Masonry S		EC1240	Third Floor Ma
EC1250	Fourth Floor Slab & Co		EC1250	Fourth Floor S
EC1300	Fourth Floor Masonry		EC1300	Fourth Floor N
EC1310	Roof Slab		EC1310	Roof Slab
EC1340	Stair and Elevator Ma		EC1340	Stair and Eleva
EC1350	Roof Slab/Collar Bean		EC1350	Roof Slab/Coll
Ƴ Envelope			Roof	
EC1410	Install Exterior Windo		✓ Envelope	
EC1470	Install Exterior Windo		EC1410	Install Exterior
EC1500	Install Exterior Windo		EC1470	Install Exterior
FC1520	Install Exterior Windo		FC1500	Install Exterior

#### 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.

Activity ID	- Activity ID
CC00610 Harbour Pointe Assisted Livin	➤ Harbour Pointe Assisted Living Cente
EC1010	EC1010
EC2430	EC2430
Y EC00610.1 Building 1	Y Building 1
EC2440	EC2440
> EC00610.1.1 Structure	> Structure
✓ EC00610.1.2 Roof	✓ Roof
EC1390	EC1390
EC1400	EC1400
EC1530	EC1530
EC1540	EC1540
EC1780	EC1780
✓ EC00610.1.3 Envelope	✓ Envelope
EC1360	EC1360
EC1410	EC1410
EC1470	EC1470
ID / Code	ID / Code

#### 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**.

Priority  20 Actual Cost	Canc
Actual Cost <none></none>	
	Dolo
	Dolo
	Dele

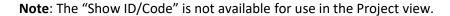
After grouping the projects by different criterias, the Project table and the Gantt chart will look like the image below.

Ŧ					M	ultiple Pro	jects.xer - S	ScheduleR	Reader															-	8	×
	VBS Projects Resources	s Assignments		Reports Linear Se	theduling	Proje	ect Expenses																		∧ Sty	yle 🔹 🤇
All Projects	Gantt     Gantt     Details     Proje	ect Outline Filter	r Auto Filter Jota	Sort Sort	r I Periods	🗰 Yea	r/Month	Timesca		Customize Timescale	e Find															
Project ID		▼ Start	Finish	Data Date					2019					-							020					
✓ 1 Mandatory		-			Feb	Mar	Apr M	May J	un Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
¥ \$166,884.63		14-Feb-11 A	14-Jan-13																							
IT00783-2	ERP COST XML	14-Feb-11 A	14-Jan-13	01-Jun-11																						
¥ \$2,246,979.52		01-Jul-10*	31-Jul-12																							
NRG00910-1	Plant CNC 45 - LS	01-Jul-10*	31-Jul-12	30-Apr-11																						
✓ 2 High																										
¥ \$0.00		31-Jan-20	12-Mar-20*														-									
TE5002	Backup - TEST Project	31-Jan-20	12-Mar-20*	31-Jan-20										31-	an-20		12-	Mar-20	e i							
¥ \$12,297.74	becap restricted	31-Jan-20 A	20-Apr-20													_		<u> </u>								
TE5001	TEST Project	31-Jan-20 A	20-Apr-20	21-Feb-20										31-Jar	1-20 A		_	-	20-Apr-2	0						
¥ \$31,996.17		30-Jan-20 A	14-Apr-20															-								
TES001-1	TEST Project	30-Jan-20 A	14-Apr-20	01-Apr-20										30-Jan	-20 A			1	4-Apr-20							
V No Priority																										
¥ \$0.00		29-Feb-20	23-Jul-20														_	_		_	_					
DifCal-01	Activites with diff calendars		23-Jul-20	25-Mar-20											29-F	eb-20		_	-	-	-	23-Jul-2	0			
NEWPROJ	Added Date	04-May-20	08-May-20	04-May-20													04-1	May-20	08-	May-20						
TF001	Total Float	03-Mar-20	09-Mar-20	03-Mar-20											03-N	Aar-20	09-1	Mar-20	-							
¥ \$4,780.00		04-Mar-20	29-Jun-20														_		-	_						
PRU001	Primary Units	04-Mar-20	29-Jun-20	18-Mar-20											04-6	Mar-20	·				29-Jur	-20				
					<																					
General		Project I	D:			P	roject Name	e:																		
Schedule Options		Statu	15:			Responsit	ole Manage	r:																		
Codes																										
User Defined Fields																										
User Defined Fields																										

## 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.

1	\cti	vity ID	Activity Name	Act	ivity ID	Activity Name
`	' Ha	arbour Pointe Assisted Living Cent	er	ЧΗ	arbour Pointe Assist	ed Living Center
	E	C2430	Substantial Completion		EC2430	Substantial Con
	Y	Building 1		×	Building 1	
		EC2440	Complete Building 1		EC2440	Complete Build
	ŀ	✓ Structure			✓ Structure	
		EC1240	Third Floor Masonry S		EC1240	Third Floor Mas
		EC1250	Fourth Floor Slab & Co		EC1250	Fourth Floor Sla
		EC1300	Fourth Floor Masonry		EC1300	Fourth Floor M
		EC1310	Roof Slab		EC1310	Roof Slab
		EC1340	Stair and Elevator Ma		EC1340	Stair and Elevat
		EC1350	Roof Slab/Collar Bean		EC1350	Roof Slab/Colla
	•	✓ Envelope			Roof	
		EC1410	Install Exterior Windo		✓ Envelope	
		EC1470	Install Exterior Windo		EC1410	Install Exterior
		EC1500	Install Exterior Windo		EC1470	Install Exterior
		FC1520	Install Exterior Windo		FC1500	Install Exterior
		✓ Hide if em	pty			]Hide if empty



#### 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**.

	Group By	Indent	To Level	Group Inte	ОК
Role Name					Cancel
Activity Nan	ne				
					Delete
				_	
				×	

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

					heduleReader				Assi	ignment																6	
File Activities WBS Pro	ojects Resource	es Assignm	ients OB	S Roles	Reports	eduling	Project	Expenses	Progre	ess Upda																	tyle 🔻
Default Resource Assignments 🔻	Spreadsheet	Assignment	Spreadsheet	Outline	Filter Auto	1 Sort	Go to A		₩ Yei	ar/Mont	h		•														
Layout	Panes	Tab	ole	Ť	Data	_	Vie			т	imescale																
ctivity Name	Start	Finish ^						2010							1 .					011							
No Role Name	01-Sep-10	24-Sep-14	Budgeted	Units		Apr	May 1	Jun Jul	Aug	Sep 159	Oct 190	Nov 192	Dec 188	Jan 109	Feb 64	Mar 83	Apr 84	May 147	Jun 180	Jul 176	Aug 160	Sep 185	Oct 280	Nov 520	Dec 475	Jan 441	425
Building 1 Elevators Complete	28-Feb-12	29-Jun-12	Budgeted																								1
Building 1 Elevators Complete	28-Feb-12	29-Jun-12	Budgeted																								1
Building 1 Elevators Complete	28-Feb-12	29-Jun-12	Budgeted																								1
Building 2 Elevators Complete	25-Jan-12	25-May-12	Budgeted																							6	29
Building 2 Elevators Complete	25-Jan-12	25-May-12	Budgeted	Units																						3	15
Building 2 Elevators Complete	25-Jan-12	25-May-12	Budgeted																							3	15
Building Pad Including UG Utils	01-Sep-10	23-Nov-10	Budgeted							21	21	18															
Building Pad Including UG Utils	01-Sep-10	23-Nov-10	Budgeted	Units						21	21	18															Т
✓ Building Slab Incl. UG Utils	29-Sep-10	27-Dec-10	Budgeted	Units						4	42	42	32														
Building Slab Incl. UG Utils	29-Sep-10	27-Dec-10	Budgeted	Units						2	21	21	16														т
Building Slab Incl. UG Utils	29-Sep-10	27-Dec-10	Budgeted	Units						2	21	21	16														
<ul> <li>Built-Up Asphalt Roofing</li> </ul>	02-Nov-11	07-Feb-12	Budgeted	Units																				20	37	22	5
Built-Up Asphalt Roofing	02-Nov-11	04-Jan-12	Budgeted	Units																				20	21	1	
Built-Up Asphalt Roofing	07-Dec-11	07-Feb-12	Budgeted	Units																					16	21	5
✓ Caulk	16-Apr-12	24-Jul-12	Budgeted	Units																							
Caulk	16-Apr-12	02-May-12	Budgeted	Units																							
Caulk	03-Jul-12	24-Jul-12	Budgeted	Units																							
Caulk	03-Jul-12	24-Jul-12	Budgeted	Units																							
V Courtyard Walks and Amenities	28-Dec-12	10-Jun-13	Budgeted	Units																							
Courtyard Walks and Amenities	28-Dec-12	10-Jun-13	Budgeted	Units																							
✓ Curbing	01-Sep-10	30-Dec-10	Budgeted	Units						21	21	21	21	6													
Curbing	01-Sep-10	30-Dec-10	Budgeted	Units						21	21	21	21	6													
✓ Curbs & Paving	28-Oct-11	17-May-13	Budgeted	Units																			3	42	42	42	15
Curbs & Paving	24-Aug-12	02-Jan-13	Budgeted	Units																							
Curbs & Paving	28-Dec-12	17-May-11	Budgeted																								
Curbs & Paving	28-Oct-11	10-Feb-12	Budgeted																				2			21	8
Curbs & Paving	28-Oct-11	10-Feb-12	Budgeted																				2	21	21	21	8
Curbs & Paving	24-Aug-12	02-Jan-13	Budgeted																								
✓ Demobilize Scaffolding	21-Jun-12	28-Dec-12	Budgeted																								
Demobilize Scaffolding	21-Jun-12	13-Jul-12	Budgeted																								
Demobilize Scaffolding	06-Dec-12	28-Dec-12	Budgeted																								
<ul> <li>Electric to Building 1 Power Vault</li> </ul>	26-Oct-11	28-Feb-12	Budgeted																				8			42	40
Electric to Building 1 Power Vault	26-Oct-11	28-Feb-12	Budgeted																				4			21	20
Electric to Building 1 Power Vault	26-Oct-11	28-Feb-12	Budgeted																				4			21	20
V Electric to Building 2 Dower Vault	21.Son.11	02.Mar.12	Rudratad	Unite																		8	21	21	21	21	21

#### 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.

Activity ID	Activity Name	Act	ivity ID	Activity Name
➤ Harbour Pointe Assisted Living Center		ЧΗ	larbour Pointe Assiste	d Living Center
EC2430	Substantial Completic		EC2430	Substantial Con
✓ Building 1		×	Building 1	
EC2440	Complete Building 1		EC2440	Complete Build
✓ Structure			✓ Structure	
EC1240	Third Floor Masonry S		EC1240	Third Floor Mas
EC1250	Fourth Floor Slab & Co		EC1250	Fourth Floor Sla
EC1300	Fourth Floor Masonry		EC1300	Fourth Floor M
EC1310	Roof Slab		EC1310	Roof Slab
EC1340	Stair and Elevator Ma		EC1340	Stair and Elevat
EC1350	Roof Slab/Collar Bean		EC1350	Roof Slab/Colla
✓ Envelope			Roof	
EC1410	Install Exterior Windo		✓ Envelope	
EC1470	Install Exterior Windo		EC1410	Install Exterior
EC1500	Install Exterior Windo		EC1470	Install Exterior
FC1520	Install Exterior Windo		EC1500	Install Exterior
✓ Hide if empty	1		- F	lide if empty

# 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<sup>™</sup> 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<sup>™</sup>, 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.

) All sel	ected filters	○ Any selecte	d filter			
	Date Range	Start	1/1/2017	1/1/2020	^	ОК
	Has Finish Constra					
	Has Lag					Cancel
	Has Resource					
	Has Start Constrain	ıt				New
	In Progress					TACALLY
	Level of Effort					Delete
	Longest Path					
	Lookahead With C		3	Months		Modify
	Lookahead With D	ata Date	3	Months		
	Milestone					Clear Filte
	Negative Float					Clear Filte
	Non What-If					
	Non-critical					
	Normal Not Started					
	Total Float Less Th		10.00	Days		

- 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**.

All selected filters	Filter	selected fil					
Date Range Has Finish Cor Has Lag	Filter Name	Activit	ies with less than 50% Co	ompletness			0
Has Resource	Display	all rows	Parameter	ls	Value	High Value	Car
In Progress Level of Effort Longest Path Lockahead W Lockahead W Melestone Negative Float Non What-If Non-critical Nor Started Total Float Les Layout Filters User Defined	A And And And	dii 10WS	(All of the following) Activity % Complete Total Float	is less th equals		i igi Yaue	Ad

#### Modify existing User-defined filter

In ScheduleReader<sup>™</sup> you can modify existing Custom filter imported with the Layout (PLF) file and Userdefined 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<sup>™</sup> 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:

÷				Project Everythir	ig.xer - Sche	duleReade	er			_			Act	ivities		_				- 8
File	Activities WBS	Projects	Resources	Assignments	OBS	Roles	Report	i Line	ar Scheduling	Project	Expense	s Pro	ogress Upda	ate Fo	ormat					▲ Style ▼
		🔲 Gantt			[ Resour	rces 🕏	Expenses	F_	$\bigtriangledown$	1	全日	3 60	to Activity	] بليله	Month/W	!.	- 1			
💾 Default	Activities -	Bottom	View		Predec	essors		- H	U U		14	Cal	endar	444	Month/w	eek			$\mathcal{P}$	
		Details		Activity	Succes			Outline	Filter Auto Filter		Sort	[\$] Fin	ancial Perio				+	Customize Timescale	Find	
	Layout		Panes			able			Data				View			Timesca	ماد	nnescale	Find	
	1						1 1				h 2016		VIEW		pril 2016	milesta	iic I			
Activity ID	Y Activity Name		רץ Or	iginal Duration	P Remain	ning Durat.	🍸 Start		▼ <b>∀</b>   <u>^</u> -			20	27 0	3 1		7 24	01	08	y 2016 15	22 29
✓ Decor				Clear Filters	from Activit	v Name		ıy-16										p==		23-May-16
A1210	Install doors			(Select	4.03	,	_	y-16 A	1.1									<b>~</b>		Install doors
A1230	Install kitcheh cabir	nets			All) asings and ba		^	y-16 A										+		nstall kitcheh ca
A1220	Door casings and b	aseboards			xterior wall fi			y-16 A										_ <b>L</b> ∎		Door casings
✓ Drywall					nterior stud w			-16								P	-	_	19	May-16
A1190	Rock walls and ceil	ings						-16 A									_	Ro	k walls and	d ceilings
A1200	Tape and mud wall	s and ceilings		Grade	site			y-16 A									<b>•</b>		Та	e and mud wal
✓ Electrical								-16								p	-		<b>1</b> 9	-May-16
A1160	Install breaker box	and rough wir	e		breaker box a	and rough \	wire	-16 A								*		Ins	tall breaker	box and rough
A1170	Finish wiring							-16 A								- Le -			Fi	hish wiring
✓ Exterior					fondation for HVAC Ductine			-16											- 2	0-May-16
A1240	Install windows				HVAC Ducung HVAC Unit	9		-16 A								-+			-	nstall windows
A1250	Instal siding				kitcheh cabine	ets		-16 A								→C		Instal sidir	ug 🗌	
Foundation	1				OSB exterior			ır-16					P			20	5-Apr-16			
A1050	Install fondation fo	rms		Install	paper and shi	ingles		r-16 A	1				*			In	stall fondat	ion forms		
A1060	Install slab plumbin	g			roof sheeting			-16 A					4		Install	slab plumbin	g			
A1070	Pour and float slab	concrete			rough plumbir			-16 A							Pour and	foat slab cor	crete			
✓ Framing					slab plumbing	)		-16						1	P		-		May-16	
A1080	Erect exterior wall	frames		✓Install			~	-16 A									Ere	ct exterior v	vall frames	
A1090	Erect interior study	walls			windows		•	-16 A								> <b>—</b>		Ere	ct interior :	tud walls
A1100	Install OSB exterior	cladding			OK		Cancel	-16 A								*		Install OSB		
✓ Grading	1				U		21-14	ar-16			P	_		🔍 07-Apr	-16					-
A1030	Survey and mark ou	rt site	2		0			ar-16 A							and mark	out site				
A1040	Grade site		5		0		23-N	ar-16 A			G	Cro	de site							
✓ Home Con	struction		42		45		21-N	lar-16			P						-			23-May-16
A1010	Project Manageme	nt	42		45			ar-16 A												Project Mana
A1000	Project Start		0		0			ar-16 A			L	Project St	art							
A1020	Project Complete		0		0						ſ								Orbie	et Complete
✓ Landscape			1		13		03-N	lay-16									P			-May-16
A1260	lay turf and plant t	raar	1		13			au-16 A	× 1										1	uturf and plants
<									> <											>

Another specific case is when you filter **Milestones** in ScheduleReader<sup>™</sup>. Since, the milestone activity has the same start and finish date, for Finish Milestone and Start Milestone in ScheduleReader<sup>™</sup> 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.

Filte	ers				×
Sh	now activities that match All selected filters	Any selected file	ter		
	Default				ОК
	Date Range	Start	1/1/2017	1/1/2020	Cancel
	Responsible Mana	iger		Enterprise	Cancel
⊳	User Defined				
					New
					Delete
					Modify
					Clear Filters
					Ciedi Filters
<				>	

- 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**.

Filters				×
Show activities that match O All selected filters	Any selected fil	lter		
⊿ Default				ОК
Date Range	Start	1/1/2017	1/1/2020	Cancel
Responsible Manager			Enterprise	Cancer
✓ User Defined				
Resource Type Filter				New
				Delete
				Modifi
				Modify
				Clear Filters
<				>

## Modify existing User-defined filter

In ScheduleReader<sup>™</sup> you can modify existing Custom filter imported with the Layout (PLF) file and Userdefined 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<sup>™</sup> 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.

																		ScheduleReader					
Style	<b>^</b> s														Progress Updat	Project Expenses	Linear Scheduling	oles Reports Lir	OBS Roles	ignments C	rces Assign	ects Resourc	ile Activities WBS Proje
															1	nt 🗰 Week/Day	🔁 Go to Assignmen		3 FL		rt 📃	Spreadsheet	
																- Trees, Day	🔛 Calendar					Details	Default Resource Assignments 🔻
																	🔋 Financial Periods		dsheet Outline	nent Spreadshei	Assignme		
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			Jan 29							Jan 22										<b>V</b>	7		V
S		T 4.55d 4	W	T	M	S	S	F	T	W	T 3.86d		S	S				V WBS	Type V	· Rate type	Finish 05-Sep-13	Start Y 01-Sep-10	Ivity Name
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	.000	1.000	1.000	1.000	1.000			1.000	1.000		1.000	1.000				0610.1.1 0610.1.2		EC00610.7			10-Jan-11	01-Sep-10	Electric to Building 2 Power Vault
	0.04	1.00d 1	1.004	1 004	1.004			1 004	1 004	1.004	1.00d				-	0610.1.2		EC00610.7			28-Feb-12	26-Oct-11	Electric to Building 1 Power Vault
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		0.21d (						0.21d			0.21d					0610.2.1 0610.2.2		EC00610.7			28-Feb-12 02-Mar-12	28-Oct-11 28-Oct-11	Fire Protection and Lighting
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																		EC00610.2.4 EC00610.2.4			15-Feb-13 22-Feb-13		
															-			EC00610.2.4			22-Feb-13 21-Feb-13		
																							Unit Finishes Building North - Floor 2
																		EC00610.2.4			28-Feb-13		Unit Finishes Building South - Floor 2
																		EC00610.2.4			07-Mar-13		Unit Finishes Building North - Floor 3
																	_	EC00610.2.4			14-Mar-13		Unit Finishes Building South - Floor 3
															-			EC00610.2.4			18-Mar-13		Unit Finishes Building North - Floor 4
																		EC00610.2.4			25-Mar-13		Unit Finishes Building South - Floor 4
															Cancel	ОК		EC00610.2.4			31-Jul-13	26-Mar-13	Final Inspections and Punchlist
																		EC00610.2.4			29-Jun-12	28-Feb-12	Building 1 Elevators Complete
																Budgeted Units		EC00610.2.4			07-Mar-13		Unit Finishes Building North - Floor 3
																							Unit Finishes Building South - Floor 2
																							Final Inspections and Punchlist
																<	~	EC00610.2.4	lard Rate	13 Standard F	25-Mar-13	11-Apr-12	Unit Finishes Building South - Floor 4
																Rate Type:			me:	Activity Name:	Ac		neral
																Role:			rce:	Resource:			oping
																Note:				Price / Unit:			inning
																Budgeted Units Budgeted Units < Rate Type:	v	EC00610.2.4 EC00610.2.4 EC00610.2.4	dard Rate dard Rate dard Rate me: rce:	13 Standard F 13 Standard F 13 Standard F Activity Name: Resource:	28-Feb-13 05-Sep-13 25-Mar-13 Ac	14-Mar-12 30-Apr-13	hes Building South - Floor 2

## **Project View**

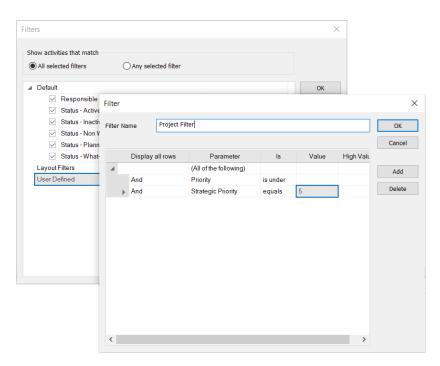
## Create custom User-Defined Filters

In ScheduleReader<sup>™</sup>, 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.

Filters				×
	ities that match	○ Any selected filter		
⊿ Default	t			ОК
$\checkmark$	Responsible Manag	jer	Enterprise	Cancel
$\checkmark$	Status - Active			Cuncer
$\checkmark$				
$\checkmark$				New
	Status - Planned			 Delete
	Status - What-If			 
Layout User D				 Modify
UserD	ennea			 Clear Filters
				ciedi filters

- 3. A new **Filter** dialog opens, and add a name for the new filter e.g. (Activities with less than 50% Complete).
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  - **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<sup>™</sup> you can modify existing Custom filter imported with the Layout (PLF) file and Userdefined 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<sup>™</sup> 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:

÷			Multiple Projects.xer - ScheduleReader		_ 6 ×
File Activities WBS Projects	Resources Assignments	OBS Roles Reports Lin	ear Scheduling Project Expenses		▲ Style ▼ ?
Layout Par	tails Project Outline Filte	1 L-1 H+ 🖽 G	lendar view View View View View View View View V		2, 2020 Qtr 3, 2020 Qtr 4, 2020
TES001 TEST Project	31-Jan-20	20-Apr-20 21-Feb-20	r Apr May Jun Jul	Aug Sep Oct Nov Dec Jan Feb Mar Apr M 31-Jan-20	Aay Jun Jul Aug Sep Oct Nov Dec
1 EB002 TEST Project 155002 Backup-TIST P NR060910-1 Plant CK-63 - 1 DfCa-9 0. Acthore was 17600 Total Foat 17601 Total Foat 17602 Primary Units 1700789-2 ERP COST 200 1755001-1 TEST Project	oject 31-Jan-20 5 01-Jul-10	12-Apr-20         11-Apr-20           12-Mar-20         11-Apr-20           13-Uar-12         30-Apr-11           23-Uar-20         25-Mar-20           25-Uar-20         65-Mar-20           25-Uar-20         18-Mar-20           25-Uar-20         18-Mar-20           26-Mar-20         04-Mar-20           14-Apr-20         01-Apr-20	Clear Filters from Data Date → 39-4p-11.7x00 → 39-4p-11.7x00 → 31-3p-20.0x00 → 31-3p-20.0x00 → 31-3p-20.0x00 → 31-4p-20.0x00 → 31-4p-20.0x00	31-Jan-20 29-Feb-27 03-Mar-20 04-Mar-20 04-Mar-20 30-Jan-20 34-A	23-Jul-20 25-Jun-20 08-May-20
			OK Cancel		
			(	_	>
General	Project	ID:	Project Name:		
Schedule Options	Stat	us:	Responsible Manager:		
Codes					
User Defined Fields					

Another specific case is when you filter **Milestones** in ScheduleReader<sup>™</sup>. Since, the milestone activity has the same start and finish date, for Finish Milestone and Start Milestone in ScheduleReader<sup>™</sup> 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<sup>™</sup> 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.

t		
Field Name	Sort Order	ОК
Start	Ascending	
	<ul> <li>Ascending</li> </ul>	Cancel
Activity % Complete Activity Count Activity Count Activity ID Activity Leveling Priority Activity Name Activity Nesource Assignme Activity Step Count Actual Status Actual Ompleted Activities Actual Duration Actual Expense Cost Actual In-Progress Activities Actual In-Progress Activities Actual In-Progress Activities Actual In-Progress Activities Actual Labor Cost Actual Nonlabor Cost Actual Nonlabor Cost Actual Nonlabor Cost Actual Nonlabor Units Actual Nonlabor Units Actual Nonlabor Units Actual Nonlabor Units Actual Nonlabor Units Actual Nonlabor Units Actual This Period Labor Ur Actual This Period Nonlabo Actual Total Cost Added By		Add Delete

#### 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.

Find		×
Find:		Find next
Find by Activity Name	~	
Criteria Match whole word only Match case	Direction O Up Down	Cancel

# Time-Location view

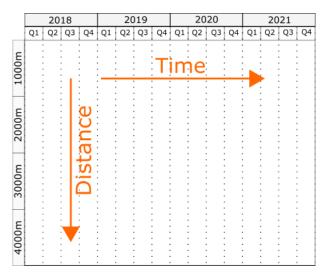
## INTRODUCTION

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 userdefined 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.

P6	User Defined Fields							×
U	ser Defined Fields						Close	
	Activities	-	-			÷	Add	
Ľ			_			_		-
	Z Display: User Defined Fields					×	Delete	
Tit	le	$\nabla$	Data Type		^	-		
	LINEAR_END_POSITION		Number			?	Help	
	LINEAR_SHAPE_CODE		Text	1				
	LINEAR_START_POSITION		Number	1				

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.

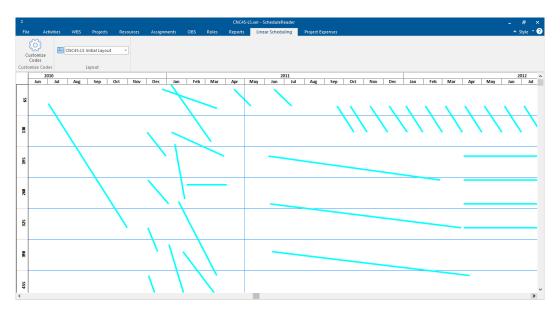
Once the UDFs are created, insert them in the Activity table and populate the values for Start Point", "End Point" and "Shape". Example for populating these fields is presented on the image below:

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.

Cu	stomize Linear Coo	les		×
	Display	Code Name	Code Type	Preview
•		EBRT	Block	
	×	OCP	Milestone	
	$\checkmark$	RHP_2	Bar	
	$\checkmark$	JNB	Block	
	$\checkmark$	LIN	Line	
C	Code Style			
	Main Color:		Border Color:	
	Start Shape:	~	End Shape:	~
				OK Cancel

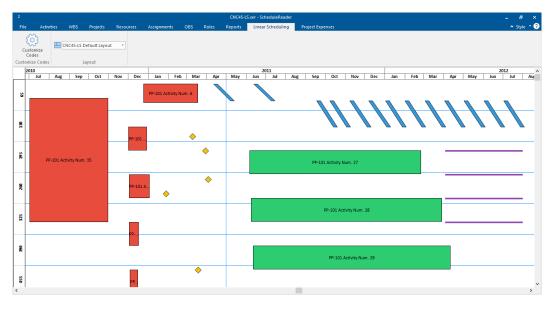
Chart's customization is performed with the following steps:

- 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.

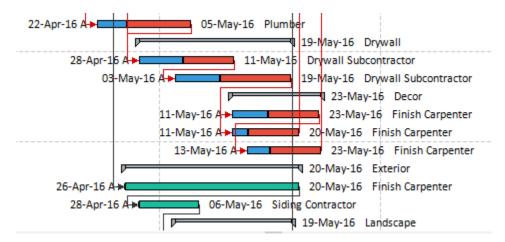
The initial project, that is loaded as an example in ScheduleReader, after customization will look like the image below.



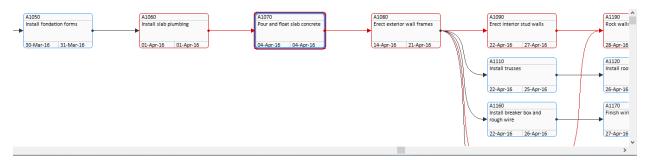
# Critical Path and Driving Activities

## 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<sup>™</sup> 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.

## ScheduleReader™

		EC2220	Paint Exterior	Not Started	0%	13-Sep-12		13-Sep-12+		06-Dec-12	Thermal P
		EC2230	Install Railings	Not Started	0%	13-Sep-12		13-Sep-12 ►		I -14 Nov-12 Therm	nal Protectic
		EC2300	Demobilize Scaffolding	Not Started	0%	06-Dec-12			06-0	Dec-12	Dec-12 The
		EC2320	Shell Complete	Not Started	0%					🕪 She	II Complete
	~	Interior Finishes				21-Feb-12	-				
		EC2000	Unit Finishes Building N	orth - Not Started	0%	21-Feb-12	=				-
		EC2030	Unit Finishes Building Sc	with - Not Started	094	28-Fah-12	Ť E				
		eral		GoTo	Activity: EC2300			Activity Nam	ne: Demo	obilize Scaffolding	
	itati	US		Activity ID	Activity Name		Rela	ationship Type	Lag	Driving	
F	leso	ources		EC2220	Paint Exterior		FS		0	Yes	
F	lela	tionships									
C	ode	es									

# Manage Layouts

Within ScheduleReader<sup>™</sup> 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<sup>™</sup>:

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

## IMPORT CUSTOM LAYOUTS

In ScheduleReader<sup>™</sup>, 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<sup>™</sup> 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.

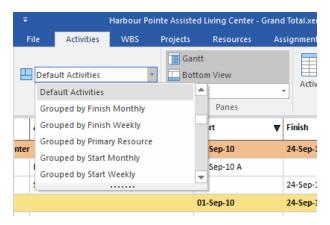
$\langle \boldsymbol{\epsilon} \rangle$		Harbour Pointe Assisted Livi	ng Center - Grand Total.xer - ScheduleRea
🧰 <u>O</u> pen			
Info	Manage Layouts		
Recent	Default Layouts  Activity	^	Turat
🕞 Options	Activity Status Layout		Import
	Activity Type Layout Default Activities		Export
Print	Grouped by Finish Monthly		Сору
	Grouped by Finish Weekly		
Baselines	Grouped by Primary Resource		Reset
	Grouped by Start Monthly Grouped by Start Weekly		Rename
Layouts	Grouped by WBS path		
	Project Schedule	¥	Remove
Reports	Show default layouts in the "Layout" menus		
🔀 E <u>x</u> it	Custom Layouts		
	<ul> <li>Activity</li> </ul>	^	
	Activity Costs		
	Activity Units		
	Classis WBS Layout with Grand total		
	✓ WBS Default WBS my		
	WBS Path Layout 1		
	Project		
	A Resource		
	Resource Rates		
	A Assignment	~	

- 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.

Layout Name	×
Enter Layout Name: Grouped by Start Monthly	
	OK Cancel

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.

	isplay	Name	From	То	Filter	Preview	
		Remaining Level of Effort	Remaining Early Start	Remaining Early Fini	Level of Effort		
		Actual Level of Effort	Actual Start	Actual Progress Date			
	~	Project Baseline	BL Project Start	BL Project Finish	Normal		
	$\checkmark$	Primary Baseline	BL1 Start	BL1 Finish	Normal		_
	$\checkmark$	Second Baseline	BL2 Start	BL2 Finish	Normal		_
	$\checkmark$	Third Baseline	BL3 Start	BL3 Finish	Normal		_
	$\checkmark$	Actual Work	Actual Start	Actual Progress Date	Normal		
	$\checkmark$	Remaining Work	Remaining Early Start	Remaining Early Fini	Normal and Non-critical		
	$\checkmark$	Critical Remaining Work		Remaining Early Fini			
		Start Constraint	Remaining Early Start	Remaining Early Fini	Has Start Constraint		
		Finish Constraint	Remaining Early Start	Remaining Early Fini	Has Finish Constraint		
	$\checkmark$	Primary Baseline Milestone	BL1 Start	BL1 Finish	Milestone	•	•
	$\checkmark$	Secondary Baseline Milestone	BL2 Start	BL2 Finish	Milestone	<b>♦</b>	٠
	$\checkmark$	Tertiary Baseline Milestone	BL3 Start	BL3 Finish	Milestone	•	•
	Style						
Sh	Style nape plor			~			
Sh Co	nape			<b>v</b>			
Sh Co	nape blor	on Label		v 			
Sh Co	ape olor abels	on Label		<ul> <li>✓</li> <li>✓</li> </ul>			
Sh Co	ape olor abels	on Label					
Sh Co	ape olor abels	on Label					
Sh Co	ape olor abels	on Label					

# 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.

Defau	lt		Ŧ				
A A	ctivity	^				-	
	Activity Status Layout		F	ile	Activities	WBS	Projects
	Activity Type Layout						
	Default Activities		_				_ #
	Grouped by Finish Monthly			Defau	It Activities		
	Grouped by Finish Weekly			Grou	uped by Start	Monthly	🔺 et
	Grouped by Primary Resource			Grou	uped by Start	Weekly	
	Grouped by Start Monthly			Grou	uped by WBS	nath	
	Grouped by Start Weekly	~	Act	i i	· · · · ·	putti	Ac
	0	*		- î	ect Schedule		
🗹 Sho	ow default layouts in the "Layout" menus		Υн	Cust	om Layout 1		
Custo	m			Cust	om Layout 2		🖵 <sup>Bu</sup>
	ctivity			E			Su
	Custom Layout 1						
•	Custom Layout 2						
W	BS						
P	roject						

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.

Default				Ŧ			
Activity			$\sim$				
Activity Sta	atus Layout			File	Activities	WBS	Projects
Activity Typ	pe Layout						
Default Act	tivities						
Grouped b	y Finish Monthly			L Cus	tom Layout 1		
Grouped b	y Finish Weekly			Cu	istom Layout 1		🔺 eta
Grouped b	y Primary Resource			Cu	istom Layout 2		
Grouped b	y Start Monthly				2		
Grouped b	y Start Weekly		~	Acti			Act
O	WDO		*				
Show default I	layouts in the "Layout" menu	s S		МНа			
Custom				E			🕳 <sup>Bui</sup>
▲ Activity				E			Sul
Custom La	yout 1						
Custom La	yout 2						
WBS							
Project							

# **Baselines**

### COMPARE PROJECTS

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

¢		Harbour	Pointe Assisted I
🦰 <u>О</u> реп			
Info	Import Baselines		
Recent	Project Baseline		
Dpt <u>i</u> ons	Primary Baseline	X	Import
Print		X	Import
Baselines	Secondary Baseline		
Layouts		X	Import
Reports	Tertiary Baseline	X	Import

# 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.

$\langle \boldsymbol{\epsilon} \rangle$		Project Everyt
📂 <u>O</u> pen		
Info	Import Baselines	
Recent	Project Baseline	
Copt <u>i</u> ons	þ:\Test Files - 18.8\Most\Project Everything - PROJECT BASELIN X	Import
	Primary Baseline	
Print	:\Test Files - 18.8\Most\Project Everything - PROJECT 1 BASEL X	Import
Baselines	Secondary Baseline	
Layouts	X	Import
Reports	Tertiary Baseline	
	X	Import
🔀 E <u>x</u> it	☑ Remember Imported Baselines	
	* When calculating earned value from a baseline "At Completion values with	current dates" is used

### 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;

Info	Import Baselines	
Recent	Project Name:	Project Baseline
🕞 Opt <u>i</u> ons	Calculating Performance Percent Complete     Different Project Calendar	PER0001 - B1
	Eamed Value Analysis	Primary Baseline
Print	Resource Curves on Performance	PER0001 - B1 × Import
Baselines		Secondary Baseline
Layouts		PER0001 - B2 · X Import
Reports		Tertiary Baseline
		PER0001 - B3 × Import
× E <u>x</u> it		PER0001 - B1 PER0001 - B2 PER0001 - B3
		* When calculating earned value from a baseline "At Completion values with current dates" is used.

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

Project Baseline		
<b>v</b>	Х	Import
PD2 - B1 PD2 - B2 PD2 - B3		
•	Х	Import

**Note:** When you compare projects use the same project with the **same activities IDs**. The baseline values in ScheduleReader<sup>™</sup> 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.

			ScheduleReader				Activi	ties						ø
le Activities	WBS Projects Re	sources Assignme	nts OBS Roles	Reports	Linear	Scheduling	Progress Update	e For	mat					Style
Default Activities	Gantt     Gantt     Details     Pa	w	ivity Resources Findecessors Successors Table	Outline Filter	Auto Filter Data	Group Sor	Calenda	ır II Periods	Quarter/Month       -	Cus	tomize rescale			
vity ID	Activity Name	Activity Status	Activity % Complete	Start	^	March 201			April 2016		May 201			
Grading	1			21-Mar-16		06 13	20 27	03	10 17 24 07-Apr-16 Grading	01	08 15	22	29	05
A1030	Survey and mark out site	Completed	100%	21-Mar-16 A					07-Apr-16 A Land Surveyor					
A1040	Grade site	Completed	100%	23-Mar-16 A			25-Mar	16 A Op	erator					
Foundation				30-Mar-16			P==		Q 26-A	pr-16 Foun	dation			
A1050	Install fondation forms	Completed	100%	30-Mar-16 A			╘	-	26-A	pr-16 A Ro	ugh Carpenter	Laborer-Cor	struction	
A1060	Install slab plumbing	In Progress	0%	01-Apr-16 A			01-Apr-16 A		14-Apr-16 Plumber					
A1070	Pour and float slab concrete	In Progress	0%	04-Apr-16 A			04-Apr-10		12-Apr-16 Laborer-Cons	truction				
Structure				14-Apr-16					Þ			23-1	1ay-16 Str	ucture
Framing				14-Apr-16					p		11-May-1	6 Framing		
A1080	Erect exterior wall frames	In Progress	0%	14-Apr-16 A				14-A	pr-16 A	03-Ma	y-16 Rough C	arpenter		
A1090	Erect interior stud walls	In Progress	0%	22-Apr-16 A					22-Apr-16 A	_	11-May-:	6 Rough Ca	rpenter	
A1100	Install OSB exterior cladding	In Progress	0%	22-Apr-16 A					22-Apr-16 A	05-1	May-16 Roug	n Carpenter		
Roof				22-Apr-16					P		9 09-May-16	Roof		
A1110	Install trusses	In Progress	0%	22-Apr-16 A					22-Apr-16 A	05-1	May-16 Roug	n Carpenter		

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**:

Customize Columns X
Available Columns          BL Project Actual Labor Units       Activity ID         BL Project Actual Nonlabor Units       Activity Name         BL Project Nonlabor Units       Start         BL 1 Actual Labor Units       Finish         BL 1 Actual Nonlabor Units       K         BL 1 Actual Labor Units       K         BL 1 Actual Nonlabor Units       K         BL 1 Actual Nonlabor Units       K         BL 1 Actual Nonlabor Units       K         Budgeted Labor Units       K         Budgeted Labor Units       K         Remaining Labor Units       K         Variance - BL Project Labor Units       K         Variance - BL Project Nonlabor Units       K

82

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<sup>™</sup> 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<sup>™</sup> 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<sup>™</sup> 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.

Harbour Pointe Assisted Living Center - Grand Total.xer - ScheduleReader										
File	Activities V	VBS Projects	Resources	Assignments	OBS	Roles	Reports	Linear Scheduli		
Progress       Image: Constraint of the second discard										
Activity ID		Activity Name	Activity St	atus Activ	ity % Comple	ete Sta	art	<b>Finish</b>		
Y Home (	Construction		_			21	-Mar-16	06-Jun-18		
A10	10	Project Management	Not Starte	d 0%		1	-Mar-16 A	01-May-18		
A10	00	Project Start	Not Starte	d 0%		1	-Mar-16 A	06-Jun-18		
A10	20	Project Complete	Not Starte	d 0%						
🖌 Gra	ding			^		1	-Mar-16	09-May-18		

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.

A1010	Project Management	In Progress $$	0%
A1000	Floject start		0%
A1020	Design Consultation	In Progress Completed	0%

3. Insert value in Activity % Complete.

~	Home Construction			· · · · · ·
	A1010	Project Management	In Progress	0

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.

Ŧ	NEWPROJ-2.	xer - Schedu	lleReader				
File Activities WBS	Projects Reso	urces A	ssignments	OBS	Roles	Reports	s Linear Sch
Updating fields 🔹	Spreadsheet		ent Spreadsheet Table	Outline •	Filter	Auto Filter	Go to Assig
Activity Name	,	Remaini	ng Units / Time	Remaini	ng Units	Units %	Complete
✓ No Resource ID				12499h		0.11%	
Market Research		379h/d		12499h		0.11%	
✓ Inspections				Oh		100%	
Market Research	8h/d		Oh		100%		
✓ Hydroblaster				14118h		0%	
New Activity		111h/d		14118h		0%	

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;

Ŧ				NEW	/PROJ-2.xer - Sch	neduleR
File	Activities	WBS	P	rojects	Resources	Assig
				Gant	t	
💾 Defa	ault Activities		-	🛄 Botto	om View	
				Details		*
	Layout			Details		
Activity II	D			Trace Lo	gic	
✓ (New P	roject)			Resourc	ce Usage Profile	
			_			

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

General
Status
Resources
Relationships
Codes
Notebook
Steps

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

General	Activit	y: <b>A1000</b>	Activ	Activity Name: Market Research				
Status	Resource ID	Resource Name	Original Lag	Budgeted Units	Actual Units			
Resources			7	40h	13h			
Relationships	INSP	Inspections	7	40h	40h			
Codes	Material	Material Resources	0	96CY	42CY			
codes	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.

Ŧ	NEWPROJ-2.xer - ScheduleReader										
File	Activities	WBS	Projects	Resources	Assig	Inments	OBS	Roles	Repo		
📙 Defa	ult Activities	÷	Gantt	m View	Ŧ	Activity	Resour → Predec → Succes	essors	Outline		
	Layout			Panes			Table				

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

vailable Columns		-	Inserted Columns	
Dates	· ·		Resource ID	
Durations	<b>~</b>		Resource Name	
General	<b>~</b>		Remaining Units / Time	
Percent Completes	<b>^</b>			
Units % Complete				-
Units	^			
Actual Overtime Units				$\sim$
Actual Regular Units				
Actual This Period Units				
Actual Units				
At Completion Units				
Budgeted Units				
Remaining Units				

6. Insert the updated.

General	Activit	y: A1000	Activity	Activity Name: Market Research					
Status	Resource ID	Resource Name	Remaining Units / Ti	Remaining Units	Actual Finish	Original			
Resources			379h/d	12499h	İ				
Relationships	INSP	Inspections	8h/d	Oh	14-Mar-18				
Codes	Material	Material Resources	OCY/d	0CY					
	D	Nonlabor Resource	8h/d	1047h					
Notebook		1		A					
Steps									

# 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.

Settings		×						
Start and Finish U	Update Start V Finish UDF Update Finish V							
User Info Username	Insert Username and Update Date Create Excel by Username	]						
	Note: Changes in "User Info" section will be effective after application's restart.							
	OK Cancel							

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.

Add Activity					×
Activity					
Project	(New Project)				
WBS	Development				
ID	068a196e-af2c-	4acb-b8eb-ea7	03571960c		
Name					
Proposed Start an	nd Finish				
Start UDF	Update Start		Finish UDF	Update Finish	
Start	10-Sep-18		Finish	10-Sep-18	
Relationships Re	sources / Roles				
Reader Bridge Re	sources / Roles				
Predecessors	Activity ID	Activity Name	e Relationship	Type Lag	Add
					Delete
					Restore
Successors	Activity ID	Activity Name	Relationship	Type Lag	Add
					Delete
					Restore
				ОК	Cancel

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

Add Relationship	×
Search	
Activity ID	Activity Name
▲ (New Project)	
<ul> <li>Market research</li> </ul>	
A1000	Market Research
A1010	Preparing documentation
A0095	WBS Summary activity
✓ Development	
A1020	Develop prototyp
A1030	Level of Effort
A1040	Resource Dependent
A1050	New Activity
	OK Cancel

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.

•	Development					 09-May-18
	A1020	Develop prototyp				09-May-18
	64ce74d1-9142-46cd-a77f-2f61cfd	NEW ACTIVITY	26-Mar-18	01-Jun-18		

## 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.

Add Activity					×
Activity					
Project	(New Project)				
WBS	Development				
ID	1a023d94-dbb3-4c89	-a7e0-b45	077d988ce		
Name					
Proposed Start an					
Start UDF	Update Start		Finish UDF	Update Finish	
Start	10-Sep-18		Finish	10-Sep - 18	
Relationships Res	sources / Roles				
Resources	Resource ID	Resour	ce Name		Add
					Delete
					Restore
Roles	Role ID	Role N	ame		Add
					Delete
					Restore
					The store
				OK	Cancel

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

earch					
Resou	irce ID	Resource Name	^		
.⊿ E&C R	esources	0.			
.⊿ Tra	des	Trades			
	Elec	Electrician			
	Floor	Floor and Carpet Layer			
	Operator	Operator			
	GenLabor	Laborer-Construction			
	Exc	Excavator			
	INSP	Inspections			
	Hydro	Hydroblaster			
	Paint	Painter			

- 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.

Role	×
Search	
Role ID	Role Name
▲ E&C	E&C Roles
✓ Engr	Engineer
EE	Electrical Engineer
Trades	Trades
	OK Cancel

### 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.

Development				 09-May-18
A1020	Develop prototyp			09-May-18

# 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.

Legend	×
	Editable Value Cell Edited Value Cell Saved Value Cell Added Activity Row Modified Activity Row Saved Activity Row Deleted Activity Row
	ОК

# 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
  - o 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.

						Juniper Nursing Homexer - ScheduleReader							
1	Activities WBS Proje	ects R	lesources	Assignme		Roles Reports	Linear Scheduling	Project Expenses			* St		
					52								
	chedule Custom Create halysis * Report R	Edit	Filters Hiera		DCMA14 Limits Settings								
Re	ports Custom R	eports	Table Forma	st DCM	A14 Report Format								
					DCMA 14								
10	Metric	Perc	Details	Pass									
1	Logic	6.06	8 act.	0			isment report gives yo activities are missing r			pries that determines the project Length Index.	's finish date. See how pro		
2	Leads	11.11	24 rel.	0									
3	Lags	12.96	<u>28 rel.</u>	0									
4	Relationship	84.26	<u>182 rel.</u>	0	L	ogic	Leads		Lags	Relationship	Hard Constraints		
5	Hard Constraints	0.00	0 act.	0									
6	High Float/Slack	65.15	86 act.	0									
7	Negative Float/Slack	0.00	0 act.	0									
8	High Duration	40.91	54 act.	0	High Fi	loat/Slack	Negative Float/Slac	k Hg	Duration	Invalid Forecast Dates	Invalid Actual Dates		
9_	1 Invalid Forecast Da	0.00	0 dates	Ø	6								
9_	2 Invalid Actual Dates	0.00	0 dates	0									
10	Resources	88.64	117 act.	0									
11	Missed Tasks	14.39	<u>19 act.</u>	0	Res	ources	Missed Tasks	Cri	tical Path	CPLI	BEI		
12	Critical Path	100.00	0 act.	0				(					
13	CPLI	0.00	0 act.	0		-							
14	BEI	12.58	19 act.	0									

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.

Details				×
DCMA 14 Criterion6 - High Float/Sl	ack: Total tasks with high To	otal Float (> 44 days).		
The following activities does not s				
WBS	Activity ID	Activity Name	Start	Finish
NEWPROJ-2.Development	A1040	Resource Dependent	18/03/30 A	18/04/25
NEWPROJ-2.1	A1060	New Activity	18/04/17	18/06/18
NEWPROJ-2.1	A1070	New Activity	18/04/17	18/06/18

**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.

_								ScheduleReade						
		Projects	Resources	Assignments	OBS F	Roles Repor	ts Lines	ar Scheduling	Project Expenses					∧ Style *
nalysis * B	Activity WBS Project C	<ul> <li>Rej</li> </ul>	eate Edit port Report	Filters Hierarch	grand totals	DCMA Limits Set	14 tings							
	Reports	Cus	tom Reports	Table Fo	irmat	DCMA14 Repr	et Pormat							
ACTIV	VITY METRICS													
	Metrics graphical rep		Intellectore and	and an and a set										
	eted, in progress and													
	d one that is saved as			ne current ver	sion or the	project								
pratriaria														
	Seneral Counts													
										0	mpleted Activitie	5, 11.5%		
	ICMA Total Activities		26											
	ompleted Activities		3									X		
	Progress Activities		10											
N	lot Started Activities		13											
														Completed Activities
									Not Sta	ted Activities, 50.01	4			In Progress Activities
R	aseline General Cour	nts												Not Started Activities
	CMA Total Activities		26								In Propret	is Activities, 38.	553	
	ompleted Activities		0									/		
	n Progress Activities		0										/	
In			26							Not Starte		1%		
	lot Started Activities													

## 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	e image below.
---	----------------

Object       Open Relationship Counts       Image: Series	ile						schedu			
Mark A Adapt With Puper Counts Reports With Puper Counts Provide States State		Activities WBS Project	s Resources	Assignments	OBS	Roles Repo	its Linear Schedi	aling Project Expenses		▲ Style ▼ 🕃
Relationship types graphical report gives overview which type of relationships for connecting the project gives and what are the consequences of using offlerent relationships for connecting two or more activities.	MA14	Activity WBS Project Custom Brief * Brief * Brief *	Create Edit Report Report	Filters Hierarchy	Show grand total	s Limits Se	414 ttings			
while crasing the project plan and what are the consequences of using different relationships for Connecting two or more activities.	REL	ATIONSHIP TYPES								
Finish-to-Start Relationships 15     Start-to-Start Relationships 4     Finish-to-Start Relationships 0     Start-to-Start Relationships 0     Finish-to-Finish Relationships 0	while	creating the project plan and w								
Finish-to-Start Relationships 15     Start-to-Start Relationships 4     Finish-to-Start Relationships 0     Start-to-Start Relationships 0     Finish-to-Finish Relationships 0										
Frish-to-Start Relationships     15       Start-to-Start Relationships     4       Frish-to-Start Relationships     4       Frish-to-Start Relationships     0       Start-to-Frish Relationships     0										
Finish-to-Start Relationships 15     Start-to-Start Relationships 4     Finish-to-Start Relationships 0     Start-to-Start Relationships 0     Finish-to-Finish Relationships 0										
Finish-to-Start Relationships 15     Start-to-Start Relationships 4     Finish-to-Start Relationships 0     Start-to-Start Relationships 0     Finish-to-Finish Relationships 0										
Finish-to-Start Relationships 15     Start-to-Start Relationships 4     Finish-to-Start Relationships 0     Start-to-Start Relationships 0     Start-to-Finish Relationships 0     Finish-to-Finish Relationships 0		Open Relationship Counts						Start-to-Start Relationshi	ps, 21.1%	
Finish-to-Finish Relationships 0 / /nish-to-Finish Relationships 0	Þ	Finish-to-Start Relationships	1	5				_		
Finish-to-Finish Relationships 0 Start-to-Finish Relationships 0										Finish-to-start keiationships
Start-to-Finish Relationships 0		Start-to-Start Relationships	4							
Tabel Reservices 10										Start-to-Start Relationships
Iotai kelaborships 19		Finish-to-Finish Relationship	is 0							
		Finish-to-Finish Relationship	is 0					Find	h-to-Start Relationships, 78.9%	Start-to-Start Relationships
		Finish-to-Finish Relationships Start-to-Finish Relationships	is 0						h-to-Start Relationships, 78.9%	Start-to-Start Relationships Finish-to-Finish Relationships
		Finish-to-Finish Relationships Start-to-Finish Relationships	is 0						h-to-Start Relationships, 78.95	Start-to-Start Relationships Finish-to-Finish Relationships
		Finish-to-Finish Relationships Start-to-Finish Relationships	is 0					First	n-to-Start Relationships, 78.9%	Start-to-Start Relationships Finish-to-Finish Relationships
		Finish-to-Finish Relationships Start-to-Finish Relationships	is 0							Start-to-Start Relationships Finish-to-Finish Relationships

## 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.

Ite       Addefit       VIS       Payed       Augunetic       OS       Repetit       Developments       Payed Experise       - Syste * C         Image: State As Possible       Fast as a farmat       DCALAR As the farmat <td< th=""><th>÷</th><th></th><th></th><th></th><th></th><th></th><th>ScheduleReade</th><th>1</th><th></th><th>- 8 ×</th></td<>	÷						ScheduleReade	1		- 8 ×
COLUME with with the built of the set of the s		Activities WBS	Projects Resources	Assignments C		Reports	Linear Scheduling	Project Expenses		▲ Style ▼ 🍞
Constraint Types graphical report presents the number of "Soft" and "Heard" constraints that are used in the project galar and may give answers why the project galar as it is and why some activities do not respect the activation of the constraints that are used in the project galar and may give answers why the project galar as the dolled as it is and why some activities do not respect the activation of the constraints that are the activation of the constraint Type Counts	DCMA1	4 Activity WBS Project C * Brief * Brief * Brief *	ustom Create Edit Report Report	Filters Hierarchy	and totals	DCMA14 Limits Setting				
used in the project plin and may give answers why the project plan is scheduled as it is and why some activities do not respects the scheduling rules.	CO	NSTRAINT METRI	CS							
Constraint Type Counts <ul> <li>A Lafe AS Possible</li> <li>Start On</li> /ul>	used	I in the project plan and m	ay give answers why th							
Constraint Type Counts     A state A5 Possible     Constraint Type Counts     Astate A5 Possible     Constraint Type Counts     Start On     Start     Start     Start     Start On	som	e activities do not respect	s the scheduling rules.							
Constraint Type Counts     A state A5 Possible     Constraint Type Counts     Astate A5 Possible     Constraint Type Counts     Start On     Start     Start     Start     Start On										
Constraint Type Counts     A state A5 Possible     Constraint Type Counts     Astate A5 Possible     Constraint Type Counts     Start On     Start     Start     Start     Start On										
Image: Start Charlow Start Sposible       0         Start Charlow Start Sposible       0         Start Charlow Start Start Charlow Start Start Charlow Start Start Charlow Start Char										As Late As Possible
A table As VoySide     0       Start On or Before     0       Start On or Before     0       Mandatory Fault     1       Fish On or Before     0       Fish On or Before     0       Fish On or Before     0       Mandatory Final, 33.31     Then do       Mandatory Final, 33.31     Then do       Fish On or Before     0       Fish On or After     0       Mandatory Finah     1	1									- (max 2)
Start On or Before     0       Mandatory Start     1       Freih On     1       Freih On or After     0       Mandatory Frieh     1       Freih On or After     0       Mandatory Frieh     1	•									
Start On or After     0       Mandatory Start     1       Finish On     1       Finish On or Before     0       Finish On or After     0       Mandatory Finish     1										Start On or Before
Mandatory Start         1           Freikh On         1           Freikh On zr Before         0								Mandatory Finish, 33.3%	Mandatory Start, 33.3%	Start On or After
Trainib Cho     1       Finib Cho     1       Finib Cho     0       Finib Cho     0       Finib Cho     0       Mandatory Finibh     1										
Finish On ce Before     0       Finish On ce After     0       Mandatory Finish     1			-							Mandatory Start
Finish On or After         0           Mandatory Finish         1										Finish On
Finish On or After         0           Mandatory Finish         1			0							Einich On or Reform
Mandatory Finish 1			0							
Menderury Finish		Mandatory Finish	1					Finish	1 On, 33.3%	Finish On or After
										Mandatory Finish

### 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.

Activities				an and De			n.ær - ScheduleReader							
Activities	WBS Projects Resour	ces Assign	ments OB	S Roles	Reports	Linea	Scheduling Project Expenses							▲ Style
i III I			1											
A14 Activity W	BS Project Custom Create E			YOW										
sis * Brief * Brie Repo			gran     Table Format		milts Settlings 14 Report Fors									
керо	rts Custom Kep	orts	lable Format	UCMA	14 Kepon Fon	mat								
Activity ID	Activity Name	Original	Activity	Start	Finish	-	Activity Status							
EC1170	Prepare and Solicit	24.13d	55%	04-Apr-11	06-May-1	2	Activity Status report gives the summary			is down a	and become	A		
> EC1190	Prepare and Solicit	14.53d	92%	14-Apr-11	04-May-1	2	to the completition of the project plan.	or the w	ork that	is done a	na nów ea	cn activity of	contributes	
EC1260	Award Contract for	4.83d	8%	21-Apr-11	05-May-1		to the project pain							
MN1520	Install Temperatur	20.00d	0%	05-Apr-11	27-May-1									
MN1440	Fabricate and Deliv	60.00d	35%	02-Mar-1	24-Jun-11.									
MN1550	Floor Decking	14.00d	0%	22-Apr-11	20-May-1									
MN1230	Fabricate and Deliv	90.00d	52.22%	21-Jan-11	30-Jun-11.		Ac	tivity 9	6 Comp	olete				
A1120	E-101 Inspection of	31.68d	5%	29-Apr-11	30-May-1	2								
A1280	E-102 Remove Floa	15.25d	35%	24-Apr-11	09-May-1		E-102 Install Channel					78		
A1830	E-201 Hydro Test S	3.58d	27%	29-Apr-11	03-May-1		E-201 Hydroblast Shell & Parts	4						
A1940	E-201 Hydroblast S	3.93d	4%	30-Apr-11	04-May-1		E-201 Hydro Test Shell Side			27				
A1370	E-102 Install Channel	23.50d	78%	09-Apr-11	02-May-1		E-102 Remove Floating Head		-	35				
A1580	E-103 Push Bundle	17.48d	12%	27-Apr-11	15-May-1		E-101 inspection of Bundle at Wash Rack	-5						
EC1290	Fabricate and Deliv	369.60d	14%	22-Feb-1	21-Aug-1				_	_	-			
EC1310	Fabricate and Deliv	243.60d	23%	01-Mar-1	13-Feb-1		Fabricate and Deliver Heat Pump and Controls	-			52			
EC1350	Concrete Foundati	21.00d	70%	15-Apr-11	12-May-1		Floor Decking	-0						
EC1360	Mobilize Scaffolding	15.00d	0%	30-Aug-1	21-Sep-1		Fabricate and Deliver System Controller	10		35				
EC1240	Third Floor Masonc	15.00d	90%	12-Apr-11	05-May-1		Install Temperature Control Equipment	-0						
EC1290	Third Floor Slab &	30.00d	92%	22-Mar-1	02-May-1		Award Contract for Brick	-	1					
EC1180	Fab & Delivery	90.00d	82%	12-Jan-11	10-May-1		Prepare and Solicit Bids for Heat Pump		-		_	_	92	
EC1200	Roadway Pavers	84.00d	84%	11-Jan-11	06-May-1		-	-	+		1	1	- Logal	
( )					•		29	5	20	40	60	80	100	

### 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.

14 Activity WBS Project Custom s\* Brief\* Brief\* Brief\* \* Filters Hierarchy Activity Units System Design Approve System D... 468h Activity Units report informs you about the current units of all activities that are part of the pr 72h 62h repare Drawings f. iew and Ap , in A bne wei Activity Units 120.0 st & Debug Line A st & Debug Line B pt Start Line A 104 pop ath Refinement a.. 29h MN1110 Install Electrical Po... 104h 100h 0h Start-Up Line B Install Tempe 455h 472h 0h 1N120 Prepare and Solicit Review Bids for Te.. 54h 49h 0h 0h MN1170 MN118 Award Contract fo BL Project Labor Units Budg

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.

	Activities WBS	Projects Resource	s Assignm	ents OBS Roles		ar Scheduling	Project Exp	enses				* 58
14 / 5* 1	Activity WBS Project Brief * Brief * Brief * Reports		irt.	* grand totals Li	DCMA14 sits Settings 14 Report Format							
1	WBS Code	WBS Name	Actual To	Remainin BL Projec	. Variance .	WBS Co	st					
N	4FG00659	Deerfield - Autom	€0.00	€0.00			10.0					
٨	AFG00659.Sys-Eng	System Engineering	€44,542.92	€0.00		WBS Cost n plan.	eport infor	ms you about	t the current costs o	r each was segment t	hat is part of the project	çt
٨	AFG00659.Hard	Hardware	€7,328.18	€12,767.38		bigur.						
٨	AFG00659.Hard	Temperature Cont	€28,932.00	€0.00								
N	AFG00659.Hard	Robot Controller	€4,186.55	€3,415.31								
N	AFG00659.Hard	System Controller	€5,545.28	€8,670.49								
N	AFG00659.Soft	Software	€0.00	€15,152.95					WBS Cos	at		
٨	//FG00659.Train	Training	€0.00	€0.00		3500	100 -					
N	AFG00659.Train	Manuals	€0.00	€12,165.12			28931	9969				
ε	C00515	City Center Office	€0.00	€0.00		3000	0.00					
E	C00515.Mechan	Mechanical/Electri	€0.00	€0.00		2500						
Ε	C00515.Ex-Finish	Exterior Finishes	€0.00	€0.00		2500						
E	C00515.Int-Finish	Interior Finishes	€0.00	€18,287.83		_ 2000	0.00 -				15152 9506	
E	C00515.D&E	Design and Engine	€80,778.95	€0.00		ب ب 1500					13132.3306	
E	C00515.Found	Foundation	€14,725.33	€151,919.61		1500	0.00			8670.4949		
ε	C00515.Structure	Structure	€0.00	€140,502.41		1000	0.00	-		5545.2764		
E	C00515.Int-Finis	Plumbing and Light	€0.00	€9,203.50					418 3415 3108	And a lot of the		
E	C00515.Ex-Finis	Doors and Windows	€0.00	€5,323.47		5000	.00 -	0 0 0	00	0 0	0 0 0	
E	C00515.Int-Finis	Floor and Carpeting	€18,715.31	€95,189.77		0.0		TTT	T T	TT	TUTT	
E	C00515.Int-Finis	Paint	€0.00	€4,634.86			Temperatu	re Control Equip	oment	System Controller		
E	C00515.Int-Finis	Carpentry	€0.00	€24,062.64		Actual To	tal Cost	emaining Total C	Cost III BL Project Total C	Cost 📕 Variance - BL Projec	tt Total Cost	

### 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.

	Activities WBS		s Assianm	ents OBS		<u> </u>	truction.xer - Schedule	Project Exper							- 0' • Style
_	Activities WBS	Projects Resource	s Assignm	ents OBS	Roles	Reports	Linear Scheduling	Project Exper	nses						<ul> <li>Style</li> </ul>
	ali dli dli	E e e													
A14	Activity WBS Project	t Custom Create Edil													
sis '	Brief Brief Brief	<ul> <li>Report Report Custom Report</li> </ul>		grand		its Settings 4 Report For									
	Reports	Custom Repor	15 1	iole Pormat	DCMAI	s Report For	nat								
	WBS Code	WBS Name	BL Projec	Actual D	Remainin	Variance	WBS Du	ration							
	MFG00659	Deerfield - Autom		0.00d	0.00d										
	MFG00659.Sys-Eng	System Engineering		48.50d	0.00d		project pla		forms you abou	it the current	duration	of each v	ves segment	that is part of	the
Þ.	MFG00659.Hard	Hardware		15.64d	21.83d		project pla								
	MFG00659.Hard	Temperature Cont		55.50d	0.00d										
	MFG00659.Hard.Ro	bot bot Controller		12.96d	41.81d										
	MFG00659.Hard	System Controller		37.77d	23.75d										
	MFG00659.Soft	Software		0.00d	31.40d					WBS Du	ration				
	MFG00659.Train	Training		0.00d	0.00d		60.0	0 -			55.5				
	MFG00659.Train	Manuals		0.00d	6.30d			-							
	EC00515	City Center Office		0.00d	0.00d		50.0	0		_				41.81	
	EC00515.Mechan	Mechanical/Electri		0.00d	230.11d									4181	
	EC00515.Ex-Finish	Exterior Finishes		0.00d	23.00d		40.0	0							
	EC00515.Int-Finish	Interior Finishes		0.00d	104.60d		~								
	EC00515.D&E	Design and Engine		109.20d	0.00d		Day 20.0	0-	21.83						
	EC00515.Found	Foundation		38.20d	97.93d		20.0	. 1	5.64						
	EC00515.Structure	Structure		0.00d	150.65d		200						12.9	6	
		Plumbing and Light		0.00d	43.80d		10.0	0							
		Doors and Windows		0.00d	7.23d			0	0	0	0	0	0	0	
	EC00515.Int-Finis	Floor and Carpeting		45.75d	533.76d		0.0			T			Ť		_
	EC00515.Int-Finis	Paint		0.00d	12.00d				Hardware	Temperatu	e Control B	Equipment	Robot (	Controller	
	EC00515.Int-Finis	Carpentry		0.00d	59.00d		BL Proje	ct Duration	Actual Duration	Remaining Dura	tion 📕 Va	riance - BL P	Project Duration		
6						Þ									

### 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.

					<u> </u>	tion.ær - ScheduleRead				
Activities WBS	Projects Resource	s Assignm	ents OBS	Roles	Reports Lin	ear Scheduling Pro	oject Expenses			<b>^</b> 5
Activity WBS Project Brief * Brief * Brief *		irt	erarchy Sho grand t	otals Lin	DCMA14 lits Settings 4 Report Format					
WBS Code	WBS Name	BL Projec	Budgete	Actual La	Remainin.*	WBS Units				
MFG00659	Deerfield - Autom		0h	0h	0h					
MFG00659.Sys-Eng	System Engineering		960h	962h	0h	WBS Units repo project plan.	ort informs you about t	he current units of each WBS sea	ment that is part of the	
MFG00659.Hard	Hardware		363h	125h	238h	project plan.				
MFG00659.Hard	Temperature Cont		725h	762h	0h					
MFG00659.Hard	Robot Controller		158h	106h	59h					
MFG00659.Hard	System Controller		293h	144h	158h					
MFG00659.Soft	Software		226h	0h	226h			WBS Units		
MFG00659.Train	Training		0h	0h	0h	400.00 -	363	1100 01110		
MFG00659.Train	Manuals		25h	0h	25h		000			
EC00515	City Center Office		0h	0h	0h	350.00 -		293		
EC00515.Mechan	Mechanical/Electri		0h	0h	0h	300.00 -		T		
EC00515.Ex-Finish	Exterior Finishes		0h	0h	0h	250.00 -	238		226 226	
EC00515.Int-Finish	Interior Finishes		422h	0h	422h					
EC00515.D&E	Design and Engine		1330h	1952h	0h	IN 200.00 -		144 158		
EC00515.Found	Foundation		4339h	305h	3994h	150.00 -	125			
EC00515.Structure	Structure		3878h	0h	3878h	100.00 -				
EC00515.Int-Finis	Plumbing and Light		154h	0h	154h	100.00 -				
EC00515.Ex-Finis	Doors and Windows		115h	0h	115h	50.00 -	0		0 0 0	
EC00515.Int-Finis	Floor and Carpeting		2893h	471h	2527h	0.00				
EC00515.Int-Finis	Paint		96h	0h	96h		Hardware	System Controller	Software	
EC00515.Int-Finis	Carpentry		384h	0h	384h	BL Project Lab	or Units Budgeted Labo	r Units 📕 Actual Labor Units 📕 Remain	ning Labor Units	
						Variance - BL	Project Labor Units			

## 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.

M14 /515 *	Activity WBS Pr	oject Custom ief * * Custom Report Custom Repo	int.	erarchy Show grand to ble Format	tals Umi	CMA14 Is Settings Report Format								
PI	oject ID	Project Name	Actual To	Remainin	BL Projec	Variance	Project Cost							
# Pr	oject		€3,387,94	€16,832,7										
	MFG00659	Deerfield - Automa	€90,534.91	€52,171,26			Project Cost graph planned) betwee							
	EC00515	City Center Office B	€146,234.68	€692,118.64			hamed betweet	in the current vers	non or the p	noject plan	and one fligt	o sevelu ds	vasemie.	
	MFG00772	Cordova - Plant Exp	€301,052.38	€591,108.87										
	NRG00870	Baytown, TX - Offlin	€0.00	€88,362.88										
	NRG00950	Red River - Refuel	€270,036.80	€574,206.72										
	NRG00800	Sunset Gorge - Rou	€57,080.73	€0.00					Pro	oject Cost				
	NRG00940	Sillersville - Refuel	€46,555.49	€707,963.42			800000.00							
	NRG00820	Johnstown - Routin	€0.00	€52,390.45			10407736008-1022		6921	11.8			707963	
	NRG00910	Driftwood - Refuel	€640,650.82	€152,354.28			700000.00 -				591108			
	EC00530	Nesbid Building Exp	€0.00	€379,665.49			600000.00 -		_	_	T			
	EC00501	Haltang Corporate	€132,263.94	€306,095.27			500000.00 -							
	MFG00189	Waterville - Autom	€0.00	€163,039.50			-							
	EC00610	Harbour Pointe Assi	€448,964.63	€3,769,50			400000.00 -				301052			
	EC00620	Juniper Nursing Ho	€332,609.91	€3,194,54			300000.00 -							
	EC00630	Saratoga Senior Co	€0.00	€4,524,53			200000.00 -		146234					
	MFG00497	Ravine - Plant Expa	€0.00	€1,307,36			200000.00 -	90534				1		
	MFG00337	Arcadia - Automate	€151,261.90	€0.00			100000.00 -	0 0		0 0	0	0	555	
	MFG00925	Melrose - Plant Exp	€760,699.08	€277,355.09			0.00	TT		TT	T	T	TT	2
							De	erfield - Automated Sy	stem	Cordova	Plant Expansion	& Moderniza	tion	
							Actual Total Cost	Remaining Total C	lost 📕 BL Proj	ject Total Cost	Variance - BL	Project Total	Cost	
4						1.1								

### **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 ID	Project Name I	BL Projec	Budgete	Actual La	Remainin	Project Units					
MFG00659	Deerfield - Automa		2749h	2099h	707h	100 Table 100	1920 - 12 of 1920 av	an 10 main s	318 (Marth	101 (6) - 1022 - 1	
EC00515	City Center Office B		20110h	3548h	17485h		cal report gives detaile he current version of t				
MFG00772	Cordova - Plant Exp		19046h	6833h	12175h	promised) between t	the current version of t	ne project plan and	one didt b	saveu as daseime,	
NRG00870	Baytown, TX - Offlin		1620h	0h	1620h						
NRG00950	Red River - Refuel		15043h	4540h	10869h						
NRG00800	Sunset Gorge - Rou		1210h	1263h	Oh						
NRG00940	Sillersville - Refuel		13580h	0h	13580h			Project Units			
NRG00820	Johnstown - Routin		959h	0h	959h	25000.00 -					
NRG00910	Driftwood - Refuel		13770h	11555h	2750h	2000.00		20110			
EC00530	Nesbid Building Exp		9346h	0h	9346h				1	19046	
EC00501	Haitang Corporate		10791h	3251h	7467h	20000.00 -		174	85		
MFG00189	Waterville - Autom		3275h	0h	3275h	2253225229					
EC00610	Harbour Pointe Assi		79385h	8854h	70925h	L= 15000.00 -				12175	
EC00620	Juniper Nursing Ho		65335h	6362h	59254h	Hour					
EC00630	Saratoga Senior Co		85365h	0h	85365h	10000.00 -				6833	
MFG00497	Ravine - Plant Expa		31341h	0h	31341h						
MFG00337	Arcadia - Automate		3026h	3024h	0h	5000.00 -	2749 2099	3548			
MFG00925	Melrose - Plant Exp		23312h	19009h	4218h		707 5		1773		

### **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.

14 Activity WBS	Project Custom Brief • • • Create Edit Report Report Custom Report	rt	erarchy Show grand to able Format	v D Stals Limit	CMA14 s Settings Report Format		
Project ID	Project Name	At Compl	BL Projec	Actual Du	Remainin	Project Duration	
MFG00659	Deerfield - Automa	181.91d		104.00d	75.91d		
EC00515	City Center Office B	681.11d		127.00d	554.36d	Project Duration graphical report gives detailed comparison of project durations (actual, remain and planned) between the current version of the project plan and one that is saved as baseline	
MFG00772	Cordova - Plant Exp	381.88d		106.00d	275.88d	and participation of determine dancers economical the project plan and one that is saved as paseline	
NRG00870	Baytown, TX - Offlin						
NRG00950	Red River - Refuel						
NRG00800	Sunset Gorge - Rou						
NRG00940	Sillersville - Refuel					Project Duration	
NRG00820	Johnstown - Routin					9000.00	
NRG00910	Driftwood - Refuel					7383 7383	
EC00530	Nesbid Building Exp	585.51d		0.00d	585.51d	8000.00 - 6962 6500	
EC00501	Haitang Corporate	601.57d		169.00d	432.57d	7000.00 -	
MFG00189	Waterville - Autom	203.91d		0.00d	203.91d	6000.00	
EC00610	Harbour Pointe Assi	1039.33d		253.33d	870.33d	> 5000.00	
EC00620	Juniper Nursing Ho	812.60d		127.00d	685.60d	≥ 5000.00 - □ 4000.00 -	
EC00630	Saratoga Senior Co	922.93d		0.00d	922.93d	(2711)	9
MFG00497	Ravine - Plant Expa	368.00d		0.00d	368.00d	3000.00 - 1631 1631 2026	
MFG00337	Arcadia - Automate	212.00d		203.00d	0.00d	2000.00	
MFG00925	Melrose - Plant Exp	391.00d		212.00d	179.00d		0
						Waterville - Automated System Saratoga Senior Community	
						At Completion Duration BL Project Duration Actual Duration Remaining Duration	

## 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;

Report Customization Report Name		×
Layout	Chart	Table - Table
Chart - Chart	Table - Chart	Table - Table - Chart
		< Back Next > Cancel

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.

Customize table	Inserted Columns	
-----------------	------------------	--

### 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.

Report Customization		×
2: Customize chart Choose Columns Available Columns Available Columns Costs Durations Financial Period Value Financial Period Value Percent Completes Vumber of Activities Percent Completes Viser Defined Filter Filter Filter	> <	< >
	< <u>B</u> ack Finish C	Cancel

# 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<sup>™</sup> 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.

	Harbour Pointe Assisted Living Center - Grand Total.xer - ScheduleF
info	Manage Reports
Recent	Custom Reports  Actual vs Original Duration  Cost Report  Import
₽rint	Critical Paths Parameters Export Export Remove
Baselines Layouts	
Reports	
× E <u>x</u> it	

- 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<sup>™</sup> 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.

$\overline{\mathbf{e}}$	Harbour Pointe Assisted Liv	ring Center - Grand Total.xer - ScheduleF
늘 <u>O</u> pen		
Info	Manage Reports	
Recent	Custom Reports  Actual vs Original Duration Cost Report	Import
🕞 Opt <u>i</u> ons	Critical Paths Parameters	Export
Print	Drawing release	Remove
Baselines		
Layouts		
Reports		
X Exit		

- 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:

Options	×
Time Units Date Format Timescale Language Table Format	Units Format Unit of Time Decimals Day
Display Codes	Durations Format     Unit of Time     Decimals       Day     0     ~       Show Duration label
	OK Cancel

### **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.

Options			×
Time Units Date Format Timescale Language Table Format	Units Format Unit of Time Day ~ Show Unit label	Decimals 0 V	
Display Codes	Durations Format Unit of Time Day ✓ Show Duration label	Decimals 0 V	
	-	ОК	Cancel

### **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.

Options			×
Time Units Date Format Timescale Language Table Format Display Codes	Date Format: Month, Day, Year Day, Month, Year Year, Month, Day Time: 12 hour (1:30 PM) 24 hour (13:30) Do not show time Show minutes Sample 11-Sep-19	Options: 4-digit year Month name Leading zeroes Separator	
			OK Cancel

### Timescale

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

Options		×
		^
Time Units	Horizontal Gridlines	
Date Format	Show Horizontal Lines every 5	
Timescale		
Language	Vertical Gridlines	_
Table Format	Show Vertical Lines every Month	
Display Codes	Show Vertical Lines every Month	
		-
	Extra Cells	
	Timescale extra cells: 5	
		_
		_
	OK Cancel	

#### 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.

Options	×
Time Units Date Format Timescale	English V
Language Table Format Display Codes	Encoding Western European (Latin 1) V
	OK Cancel

# Table Format

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

Options				×
Time Units Date Format Timescale Language Table Format Display Codes	Date Format: Month, Day, Year Day, Month, Day Time: 12 hour (1:30 PM) 24 hour (13:30) Do not show time Show minutes Sample 11-Sep-19	Options: 4-digit year Month name Leading zeroes Separator		
			OK Cancel	

# Display codes

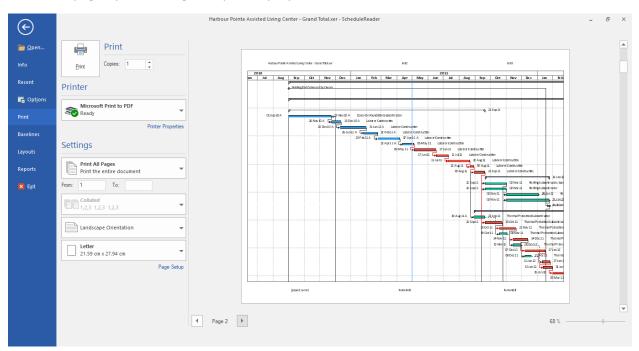
Display codes options allow you to choose whether the code values or code descriptions will be presented in view's table. It is applicable to all types of codes.

Options	×	<
Time Units	Display Codes:	1
Date Format	Code Value	
Timescale	O Code Description	
Language		
Table Format		
Display Codes		
	OK Cancel	

## Print

### **PRINT PREVIEW**

From *File*  $\rightarrow$  *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.

Page Setup	×
Options Margins Header Footer	
Time periods	
Timescale Start: 9/26/2010	
Timescale Finish: 2/16/2014	
Print Table View	
All Columns	
Gantt Chart / Spreadsheet View	
✓ Profile	
Gantt / Profile Bars Legend Page	
Scaling	
Adjust to:     100      % normal size	
○ Fit to: 3  pages wide by 3  tall	
OK Cancel	

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	Print only the Gantt chart or Spreadsheet for Resource Assignments.		
view			
Profile	Print only the Resource Usage Profile view, Activity Usage Profile view		
	or Stacked Histogram, depending on the selected view.		
Gantt/Profile Bars Legend	Print the Legend page for the Gantt Chart/Resource Usage Profile		
Page	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.

Page Setuj	р							×
Options Margir	Margins	Footer Left: D.2 in.	<b>▲</b>	Top: 0.2 in.	Right: 0.2 in.	•		
							OK	Cancel

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	

Page Setup	×
Options Margins Header Footer Number Of Sections: Height: 0.3 in, Define Header	
[File Name]	
Field ~	
File Name 🗸	
OK Cancel	

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

Page Setup	×
Options Margins Header Footer	
Number Of Sections:	
Define Footer	
[Page Number]	
Field	
Page Number 🗸 🗸	
	_
OK Cancel	

## **PRINTER PROPERTIES**

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

📥 \\PRINT\Prod	ucts Printer Pro	perties			×
Printing Shortcuts	Paper/Quality	Effects	Finishing	Advanced	
E	e click.		rint settings	that you can	
Envel		ang -		Paper size Letter	8.5 × 11 inches
				Paper source: Printer auto select	~
	MART Settings			Paper type: Unspecified Print On Both Sides	~
Booklet Printing				Yes, flip over Pages per sheet: 1 page per sheet	~
<u>S</u> ave As	<u>D</u> e	lete	Res	e <u>t</u>	
				About	<u>H</u> elp
					OK Cancel

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...)

Page Setup	×
Options Margins Header Footer	
Time periods Timescale Start: 9/26/2010 v Timescale Finish: 2/16/2014 v	
Print Table View Salt Columns Gantt Chart / Spreadsheet View	
Profile  Gantt / Profile Bars Legend Page  Trace Logic	
Scaling	
O Fit to: 3 ▲ pages wide by 3 ▲ tall	
ОК С	ancel

**Note 1**: The saved process is automatic.

**Note 2**: The print settings are saved per layout.

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