

Tasks management

Create phasing

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Adding tasks

Simple addition of a task directly to an area

Click on the area label (here "Main facilities") :



The following window pops up:



	Main facilities										
Name	Start date	End date	Area	Phase							
			Add	Edit Delete							

Click on Add then fill in the fileds 'Name' and 'Style par défaut' of the Task details tab:



[PM-00002] Construction Facilities

Task details	Dates Areas Links									
Subproject	Sous-projet par défaut									
Summary	Sous-projet par défaut									
ID	PM-00002									
Name	Construction Facilities									
Description	Installations de chantier									
Order	0									
Progress										
User fields										
Style par dé	faut Installation 👻									

In the Dates tab set the Calendar, Start and End dates like below, then click on OK :

[PM-00002] Construction Facilities									
Task details	Dates Areas Links								
Calendar	5 days 7 hours calendar								
Start date	3/16/2020								
End date	12/11/2020								

Your task is now associated with the area:



Main facilities									
Name	Start date	End date	Area						
Construction Facilities	16/03/2020 08:00	11/12/2020 15:00	Main facilities						

Creation of summary tasks

To create a summary task, click on the subproject in the left panel explorer of the Gantt chart, then click on the "Add a task" button:

Gantt chart Tasks Connected	l objects on selected drawing						
Name (ID) +	Area Filter	Š	5		Affichage des ac	tivités :	
🔻 🔳 My Project ()	-	Start	Adva	nced Filter	Default color	· •	+ %
Sous-projet par défaut		Between	Ş			-	
	Name (PM	, ?	<u> </u>			2020	
	Ivanie (Pivi	<u>'</u>	<u>}</u>		D	ecember	
	▼ Sous-projet par défaut		:00				
	Construction Facilitie	es 🖇	5:00				
	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~						

In this example we'll create the following summary task:

- name: "Phase 1 : 1/2 ROUNDABOUT North"
- ID: '1'

[1] Phase 1 : 1/2 ROUNDABOUT North									
Task details	Dates Areas Links								
Subproject	Sous-projet par défaut								
Summary	Sous-projet par défaut								
ID	1								
Name	Phase 1 : 1/2 ROUNDABOUT North								
Description									

After clicking on OK, you can see in the Gantt chart that the task has been created, but as a simple task. To turn it into a summary task, simply drag and drop a child task into it. Here we'll do it with the "Construction facilities" task:

Area Filter								Affichage des activ	vités :		
	Start	End		12	• 34 🖵	Advand	ced Filter	Default color	·	+	°0
	Between	Strict	12/23/2020	12	: 34				-		
Name (D)	News (DM)			Start (DM)	End (DM)		2020				
Name (Piv	n)			Start (PIVI)	End (Pivi)		December				
🔹 🛡 Sous-projet par défa	ut		PM-00001	16/03/2020 08:00	11/12/2020 15:00						
Construction Facilit	Construction Facilities PM-00002		16/03/2020 08:00 11/12/2020 15:00		5:00						
Phase 1 : 1/2 ROUN	IDABOUT North		1	14/12/2020 08:00	23/12/2020 1	5:00					

## **Batch import of tasks**

With Phase Manager, it is possible to create your tasks directly or to import them from an XLS file through the clip-board.

### How to import tasks

Open the file to be imported (in this case Demo Project V5.xlsx), then select and copy into the clipboard all tasks data **header included**:

ID	Parent	Name	Start	End	Calendar	Area	Impact	Impact type	Task Template	
2	PM-00001	Phase 2 : 1/4 ROUNDABOUT East								
3	PM-00001	Phase 3 : 1/4 ROUNDABOUT West								
31	PM-00001	Phase 3b : ROUNDABOUT Central Pla	tform							
4	PM-00001	Phase 4 : Road - North Lane								
5	PM-00001	Phase 5 : Road - South Lane								
6	PM-00001	Phase 6 : Final Paving								
2069	1	Installation and signaling	17/04/2019 08:00	03/05/2019 12:00	5 days 8 hours calendar	Roundabout North			Signalisation	
2097	1	Sidewalks demolition	22/05/2019 08:00	24/05/2019 15:00	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Bordures	
2125	1	paving milling and asphalt recycling	25/05/2019 08:00	29/05/2019 15:00	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Revêtements	
2153	1	Road widening + drainage	30/05/2019 08:00	01/06/2019 15:00	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Chaussée et canalisations	
2181	1	Coating and backfilling excavations	05/06/2019 08:00	07/06/2019 15:00	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Réseaux, remblayages et structur	re
2209	1	Sidewalks and cobblestone installation	08/06/2019 08:00	08/06/2019 15:00	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Bordures et pavés	
2237	1	Topsil leveling	11/06/2019 16:00	11/06/2019 16:00	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Terre végétale	_
2265	1	Pavement milling	12/06/2019 08:00	13/06/2019 15:00	5 days 8 hours calendar	Roundabout North			Fraisage	
2293	1	Subgrade layer	14/06/2019 08:00	15/06/2019 15:00	5 days 8 hours calendar	Roundabout North			Planie	
2321	1	Base layer	19/06/2019 08:00	22/06/2019 09:55	5 days 8 hours calendar	Roundabout North			Couche roulement récap jour	
2349	1	Sidewalks coating	22/06/2019 09:55	22/06/2019 14:10	5 days 8 hours calendar	Roundabout North : Sidewalks 1			Revêtements	
2377	1	Signaling	22/06/2019 14:10	22/06/2019 15:00	5 days 8 hours calendar	Roundabout North			Signalisation	
2405	3	Sidewalks demolition	26/07/2019 08:00	27/07/2019 15:00	5 days 8 hours calendar	Roundabout West : Sidewalks			Bordures	
2433	3	Installation and signaling	24/07/2019 08:00	25/07/2019 15:00	5 days 8 hours calendar	Roundabout West			Signalisation	_
2461	3	Signaling	22/08/2019 08:08	22/08/2019 12:23	5 days 8 hours calendar	Roundabout West			Signalisation	
2489	3	paving milling and asphalt recycling	31/07/2019 08:00	31/07/2019 15:00	5 days 8 hours calendar	Roundabout West : Sidewalks			Revêtements	
2517	3	Road widening + drainage	01/08/2019 08:00	03/08/2019 14:22	5 days 8 hours calendar	Roundabout West : Sidewalks			Chaussée et canalisations	
2545	3	Coating and backfilling excavations	07/08/2019 08:00	08/08/2019 14:22	5 days 8 hours calendar	Roundabout West : Sidewalks			Réseaux, remblayages et structur	re
2573	3	Sidewalks and cobblestone installation	08/08/2019 14:22	09/08/2019 14:22	5 days 8 hours calendar	Roundabout West : Sidewalks			Bordures et pavés	

#### **Explanations:**

1/ The summary tasks are imported first (IDs  $2 \rightarrow 6$ )

2/ Each task is referred to a summary task, via the "Parent" column.

3/ Each task must have a parent: in the absence of a summary tasky, the subproject (here PM-00001) is then mentioned, which is therefore here the parent of the summary tasks.

#### Go to the menu *File > Import tasks/links* .

In the import window that opens, insert the data from the clipboard by clicking on the **Paste** button:



		Import tasks/links										
	Clipboard preview											
	A	В	с	D E								
1	ID (PM)	Name (PM)	Start (PM)	End (PM)								
2	2069	Installation and signaling	17/04/2019 08:00	03/05/2019 12:00								
< [				>								
				Paste								

The preview area shows you that the data has been read from the clipboard. You can then assign each column to a Phase Manager field, either manually or by importing an existing exchange profile.

Here we'll load the profile Import ProfileEN.pmx (delivered with your installation).

Click on the *Load profile* button:

Load profile	Profile name:		
Date format	dd/mm/yyyy	•	Ignore hours

Then browse your hard drive for the exchange profile and click on **Open**.

Then check that the display is as follow:

Load profile	Profile name:	Tutorial Tas	Tutorial Tasks importation Column name is in my clipboard selection.									
Date format	dd/mm/yyyy hh:mm	• Ignore	hours									
Tasks												
✓ Import tasks												
ID	ID		-	Progress	Ignore							
Parent ID	Parent		•	Description	Ignore							
Name	Name		-	Quantity	Ignore							
Calendar	Calendar		•	Quantity unit	Ignore							
Start date	Start			Workrate Ignore								
End date	End		•	Time unit	Ignore							
Additionnal	fields		•	+								
Name	Value In	npact	Impact type	Execution	Full axis	Start distance						
Area-1	Area 👻	Ignore 🔻	Ignore 💌									
Style par déf	Task Te 🔻											

You see that the fields from you data set have been correctly assigned to the corresponding Phase Manager fields; you can click on the *Import* button at the bottom right of the window and then confirm the import :



Note on the warning window:

A window tells you that some fields have not been imported: this is informative, and concerns the empty fields "Area" and "Dates" for the summary tasks; Area having no meaning, and Dates are inherited from its child tasks:



# **Avertissements !**

The values of the following fields have not been imported: [1,G] [Warning] Incorrect zone value, value ignored. Incorrect zone value, value ignored. [2,G] [Warning] [3,G] [Warning] Incorrect zone value, value ignored. [4,G] [Warning] Incorrect zone value, value ignored. Incorrect zone value, value ignored. [5,G] [Warning] Incorrect zone value, value ignored. [6,G] [Warning] [1,F] [ Warning ] Calendar is empty. Default value: (default calendar) Start date is empty or invalid. Default value: (today's date) [1,D] [ Warning ] End date is empty or invalid. Default value: (today's date) [1,E] [ Warning ] [2,F] [Warning] Calendar is empty. Default value: (default calendar) Start date is empty or invalid. Default value: (today's date) [2,D] [ Warning ] End date is empty or invalid. Default value: (today's date) [2,E] [ Warning ] Calendar is empty. Default value: (default calendar) [3,F] [ Warning ] Start date is empty or invalid. Default value: (today's date) [3,D] [ Warning ] End date is empty or invalid. Default value: (today's date) [3,E] [Warning] [4,F] [ Warning ] Calendar is empty. Default value: (default calendar) Start date is empty or invalid. Default value: (today's date) [4,D] [Warning] End date is empty or invalid. Default value: (today's date) [4,E] [Warning] Calendar is empty. Default value: (default calendar) [5,F] [ Warning ] Start date is empty or invalid. Default value: (today's date) [5,D] [Warning] End date is empty or invalid. Default value: (today's date) [5,E] [Warning] Calendar is empty. Default value: (default calendar) [6,F] [Warning] Start date is empty or invalid. Default value: (today's date) [6,D] [ Warning ] End date is empty or invalid. Default value: (today's date) [6,E] [Warning]

After closing the import window, you can see that tasks have been imported, and that the WBS matching our imported phases has been created:

Gantt chart Tas	sks Connected objects on selected drav	win	9								
	Name (ID)	+	Are	a Filter							
🔻 🔳 My project (	0		۳	~	Start	End					*
🔻 🔳 Sous-proj	jet par défaut (PM-00001) - Default				Between	Strict					*
Phase 1	1 : 1/2 ROUNDABOUT North (1)			Name (	PM)		ID (PM)	Sta	art (P	M)	
Phase 2	2 : 1/4 ROUNDABOUT East (2)		▼ Sous-projet par défaut			PM-00001	17/04/	/2019	08:0	00	
Phase 3	3 : 1/4 ROUNDABOUT West (3)		Phase 1 : 1/2 ROUNDABOUT North			1	17/04/	/2019	08:0	00	
Phase 3	3b : ROUNDABOUT Central Platform (31)		Phase 2 : 1/4 ROUNDABOUT East			2	26/06/	/2019	08:0	00	
			Phase 3 : 1/4 ROUNDABOUT West			3	24/07/	/2019	08:0	00	
Phase 4 : Road - North Lane (4)			Phase 3b : ROUNDABOUT Centra		31	26/08/	/2019	08:0	00		
Phase 5 : Road - South Lane (5)			Roundabout	central plate	form i	7798	26/08/	/2019	08:0	00	
Dhara (	S - Final Daving (6)			Phase 4 : Road	I - North Lar	ie	4	20/09/	/2019	08:0	00
Phase 6	o : Final Paving (o)			Base layer			3105	15/11/	2019	08:0	00

## Multizone, impact, right-of-way (RoW) and execution mode

Phase Manager 3 enables extensive management of the RoW and impact of tasks. The example below illustrates those new functionalities by creating a daily sequential book.

The task 'RT V1 20+200 - 20+700' below is associated with two areas or axis, namely V1 and V2 :

Task details Dates Areas Other options Links								
Area	Execution	Full axis	Start dist	End distance	Right-of	Lengh Bef	Lengh A	Impact
V1	Mobile 👻		20.2	20.7	$\checkmark$	0.1	0.1	
V2	Fixe 👻		20.2	20.7		0.0	0.0	$\checkmark$
Ajouter 👻	-		0.0	0.0		0.0	0.0	

Here are the details of the settings:

#### V2 axis :

- 'Impact : checked' → the axis is impacted by the task throughout its duration, even if it does not take place there → this impact will be materialized on our deliverable.
- 'Full axis vs KPs : Start and End distance are set' → the impact will only concern a part of the axis (between the distance points set).
- 'Execution : Fixe' → the impact is permanent on the entire segment of the axis throughout the duration of the task.

V1 axis :

- 'Execution : Mobile' → the segment occupied on the axis by the task will move (as it lasts 3 days, we will be able to see this progression on the 3 successive pages of the sequential book).
- 'Lenght Before / After : 0.1'  $\rightarrow$  the task will have a 100 m right-of-way before and after the work (this

right-of-way will also be displayed on the deliverables).

 'Full axis vs KPs : Start and End distance are set' → the task takes place on the specified axis portion..

On the first two daily pages of the considered 3-day sequence, we can visualize:

- in yellow: the impact on axis V2
- in red: the task that is progressing on axis V1
- in grey: the Right-of-way of the task on axis V1

#### Day 1 :



#### Day 2 :

