


Step 8 - Creation and personalization of the phasing book

We are now at the “final” stage. The data is in Phase Manager, all you have to do is extract the deliverables of your choice, to analyze your project and check its feasibility or to satisfy a third party's request..

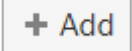
You will create a phasing book. To do this, go to the button  on the left side panel. Open the “Phasing Books” menu, click on “add” and create a book called “My Book”.

Gestion des livrables

- [Introduction](#)
- [Deliverables management levels](#)
- [The different types of deliverables](#)
- [Creating deliverables](#)
- [Copy and/or update a deliverable](#)
- [Customizing deliverables](#)
- [Managing statuses](#)
- [Clipping drawings in deliverables](#)

To create a deliverable:

1. go to the Deliverables interface 

2. then click on the  button located at the bottom of the left panel

Depending on the case, set the parameters as follows:

Phasing book

- 1) choose the sub-project
- 2) select the summary tasks corresponding to the considered phases of your project
- 3) choose a drawing and a layout
- 4) choose a label model and specify if needed the color and link style of labels
- 5) replace if needed the drawing used, board by board
- 6) click on “Add”

Create a phasing

Subproject

Name	
Sous-projet par défaut	<input checked="" type="checkbox"/> 1

Phases

Name	
▼ Sous-projet par défaut (P...	<input type="checkbox"/>
■ Phase 1 : 1/2 ROUNDAB...	<input checked="" type="checkbox"/> 2
■ Phase 2 : 1/4 ROUNDAB...	<input checked="" type="checkbox"/>
■ Phase 3 : 1/4 ROUNDAB...	<input checked="" type="checkbox"/>
■ Phase 3b : ROUNDABO...	<input checked="" type="checkbox"/>
■ Phase 4 : Road - North ...	<input checked="" type="checkbox"/>
■ Phase 5 : Road - South ...	<input checked="" type="checkbox"/>

Create pages

Start of ph... 4/17/2019 8 : 0

End of phase 12/11/2020 15 : 0

Every 1 DAYS

Drawing

Drawing Final situation- 3

Page layout Gabarit par défaut

Label links

Labels Etiquette par défaut 4

Color Black

Size 1 Dashed line

Name	Start date	End date	Drawing
Phase 1 : 1/2 ROUNDABOUT North	4/17/2019	12/11/2020	Final situation-
Phase 2 : 1/4 ROUNDABOUT East	6/26/2019	7/23/2019	Final situation-
Phase 3 : 1/4 ROUNDABOUT West	7/24/2019	9/6/2019	Final situation-
Phase 3b : ROUNDABOUT Central Platform	8/26/2019	8/30/2019	Final situation- 5
Phase 4 : Road - North Lane	9/20/2019	11/21/2019	Final situation-
Phase 5 : Road - South Lane	11/22/2019	1/29/2020	Final situation-
Phase 6 : Final Paving	2/10/2020	2/21/2020	Final situation-

7

New notebook Update

Replace
Add
Delete

- 7) "OK" : will create the phasing book.

Sequential books

Here for example, we're going to create a sequential book that will display week by week details of phase 2 of our project.

First specify the sub-project, choose the phase to be detailed, then click on "Add". That way you will be able to visualize the start and end dates of the phase :

Création d'un carnet de

Sous-projet

Nom	
Sous-projet par défaut	<input checked="" type="checkbox"/>

Phases

Nom	
▼ Sous-projet par défaut (P...	
■ Phase 1 : 1/2 Giratoire ...	<input type="checkbox"/>
■ Phase 2 : 1/4 Giratoire E...	<input checked="" type="checkbox"/>
■ Phase 3 : 1/4 Giratoire ...	<input type="checkbox"/>
■ Phase 3b : Aménageme...	<input type="checkbox"/>
■ Phase 4 : Chaussée Nor...	<input type="checkbox"/>
■ Phase 5 : Chaussée Sud ...	<input type="checkbox"/>

Fond de plans

Début de plan final- ▼

Fin de phase par défaut ▼

Multiple ☐

Étiquettes Liens

Étiquette par défaut ▼

Couleur ▼

☐ Pointillés

Nom	Début	
Phase 2 : 1/4 Giratoire Est	26/06/2019 08:00	23/07/2019 16:00

Remplacer
Ajouter

Then configure the window as follow:

- 1) choose the sub-project
- 2) tick the "Générer les planches" button, set the previously shown start and end dates of the phase, then tick the "Multiple" checkbox and set the time setp to 1 week
- 3) choose the drawing and the layout that will be used in your book
- 4) choose a lable model and specify if needed the color and link style of the labels links
- 5) click on "Replace"
- 6) for each board, adjust if needed the drawing

Création d'un carnet de phasage

Sous-projet

Nom	
Sous-projet par défaut	<input checked="" type="checkbox"/> 1

Phases

Nom	
Sous-projet par défaut (P...	<input type="checkbox"/>
Phase 1 : 1/2 Giratoire ...	<input type="checkbox"/>
Phase 2 : 1/4 Giratoire É...	<input checked="" type="checkbox"/>
Phase 3 : 1/4 Giratoire ...	<input type="checkbox"/>
Phase 3b : Aménagement...	<input type="checkbox"/>
Phase 4 : Chaussée Nor...	<input type="checkbox"/>
Phase 5 : Chaussée Sud ...	<input type="checkbox"/>

Générer les planches

Début de p... 26/06/2019 8 : 0

Fin de phase 23/07/2019 15 : 0

Multiple ☒ 1 SEMAINES 2

Fond de plans

Fond de plan Plan final-

Gabarit 3 Gabarit par défaut

Etiquettes Liens

Étiquettes Étiquette par défaut

Couleur Noir

Taille 4 1 Pointillés

Nom	Début	Fin	Plan
Semaine du 17-04-19	17/04/2019 08:00	24/04/2019 08:00	Plan final-
Semaine du 24-04-19	24/04/2019 08:00	01/05/2019 08:00	Plan final-
Semaine du 01-05-19	01/05/2019 08:00	08/05/2019 08:00	Plan final-
Semaine du 08-05-19	08/05/2019 08:00	15/05/2019 08:00 6	Plan final-
Semaine du 15-05-19	15/05/2019 08:00	22/05/2019 08:00	Plan final-
Semaine du 22-05-19	22/05/2019 08:00	29/05/2019 08:00	Plan final-
Semaine du 29-05-19	29/05/2019 08:00	05/06/2019 08:00	Plan final-
Semaine du 05-06-19	05/06/2019 08:00	12/06/2019 08:00	Plan final-
Semaine du 12-06-19	12/06/2019 08:00	19/06/2019 08:00	Plan final-
Semaine du 19-06-19	19/06/2019 08:00	26/06/2019 08:00	Plan final-
Semaine du 26-06-19	26/06/2019 08:00	03/07/2019 08:00	Plan final-
Semaine du 03-07-19	03/07/2019 08:00	10/07/2019 08:00	Plan final-

7 OK Annuler

- 7) "OK" : will create the book.

Optionnellement :

It is possible to add different sequences one after the other. To do this, proceed as above, but before clicking "Apply", choose new parameters and click "Add". When everything is added, click "Apply".

For example below, 4 monthly pages were first created (from 2019/01/01 to 2019/05/01), then 7 daily pages were added:

Création d'un carnet de phasage

Phasage

Nom

Type Sequentiel

Fond de plans

Fond de plan Carte-Zone ...

Gabarit Gabarit par déf...

Etiquettes Liens

Etiquet... Etiquette simple

Couleur ■ Noir

Taille 1 ☐ Pointillés

Générer les planches

Début d... 01/05/2019 8 : 0

Fin de p... 07/05/2019 11 : 0

Multiple ☒ 1 JOURS

Nom	Début	Fin	Plan
Mois du 01-02-19	01/02/2019 08:00	01/03/2019 08:00	Cartoucherie TOULOUSE-
Mois du 01-03-19	01/03/2019 08:00	01/04/2019 08:00	Cartoucherie TOULOUSE-
Mois du 01-04-19	01/04/2019 08:00	01/05/2019 08:00	Cartoucherie TOULOUSE-Z...
Journée du 01-05-19	01/05/2019 08:00	02/05/2019 08:00	Carte-Zone de travaux
Journée du 02-05-19	02/05/2019 08:00	03/05/2019 08:00	Carte-Zone de travaux
Journée du 03-05-19	03/05/2019 08:00	04/05/2019 08:00	Carte-Zone de travaux
Journée du 04-05-19	04/05/2019 08:00	05/05/2019 08:00	Carte-Zone de travaux
Journée du 05-05-19	05/05/2019 08:00	06/05/2019 08:00	Carte-Zone de travaux
Journée du 06-05-19	06/05/2019 08:00	07/05/2019 08:00	Carte-Zone de travaux
Journée du 07-05-19	07/05/2019 08:00	08/05/2019 08:00	Carte-Zone de travaux

Remplacer
Ajouter
Supprimer

Annuler Appliquer

Notes :

- To delete a page: highlight it and click on “Delete”.
- The position of the pages can be changed using the drag&drop

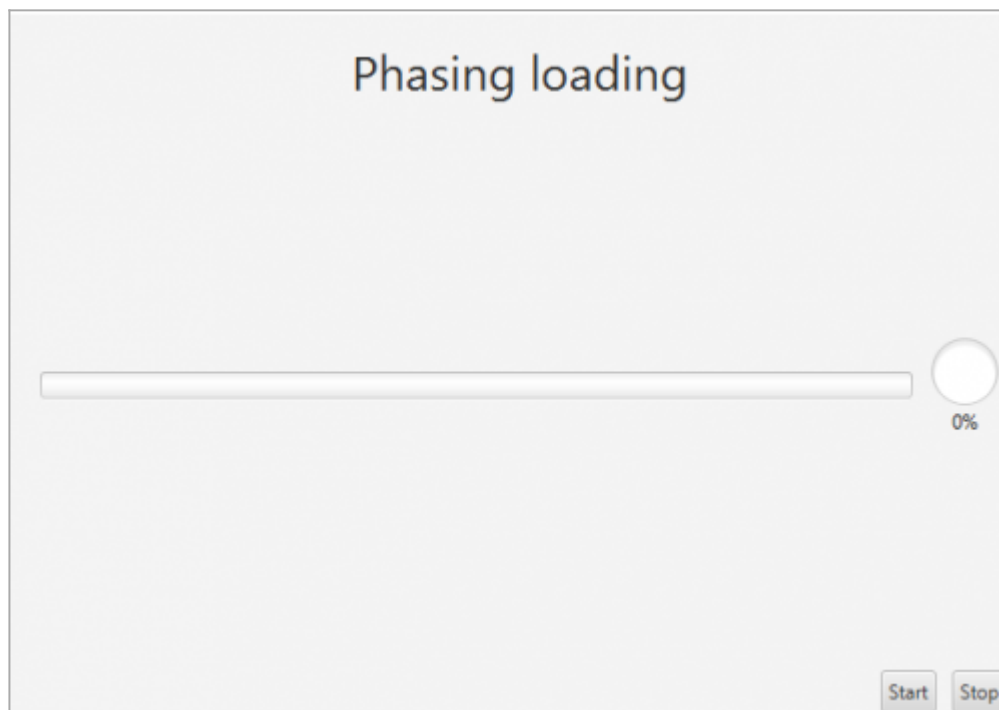
Creating deliverables

Adjust labels

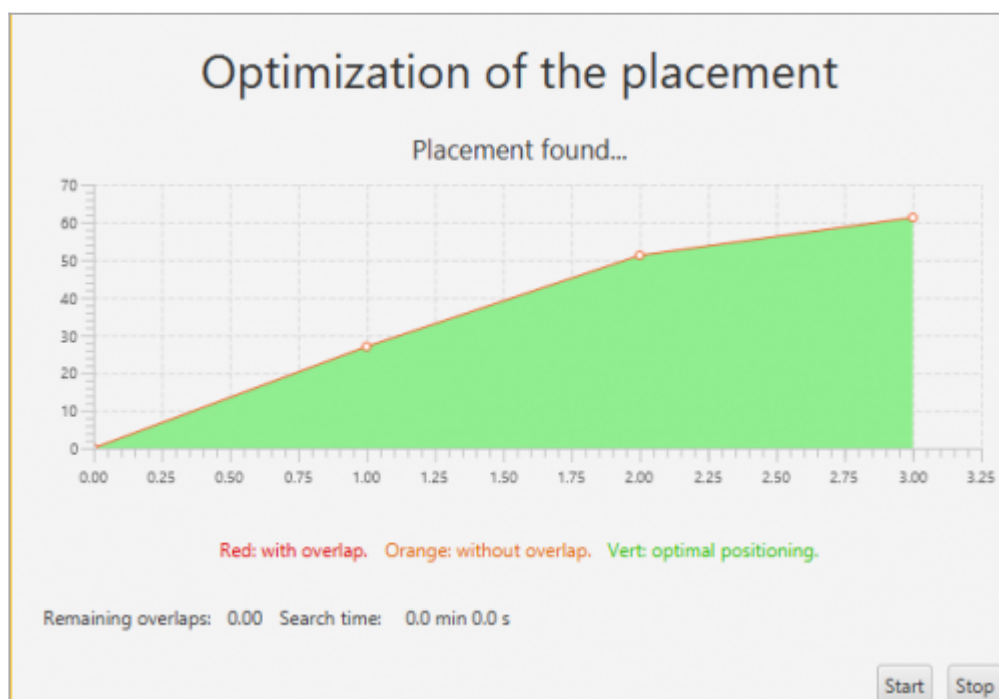
As the deliverable is created, it is essential to customize it. Let's start by handling the labels.

The labels can of course be adjusted manually, but it is also possible to adjust them automatically. To do this, go to the top tab “**Page**”. You can adjust the size of your labels using the “Annotations zoom” button, then optimize the position of your labels using the “**Optimize annotations positions**” button.

On the next window, click on “start”:

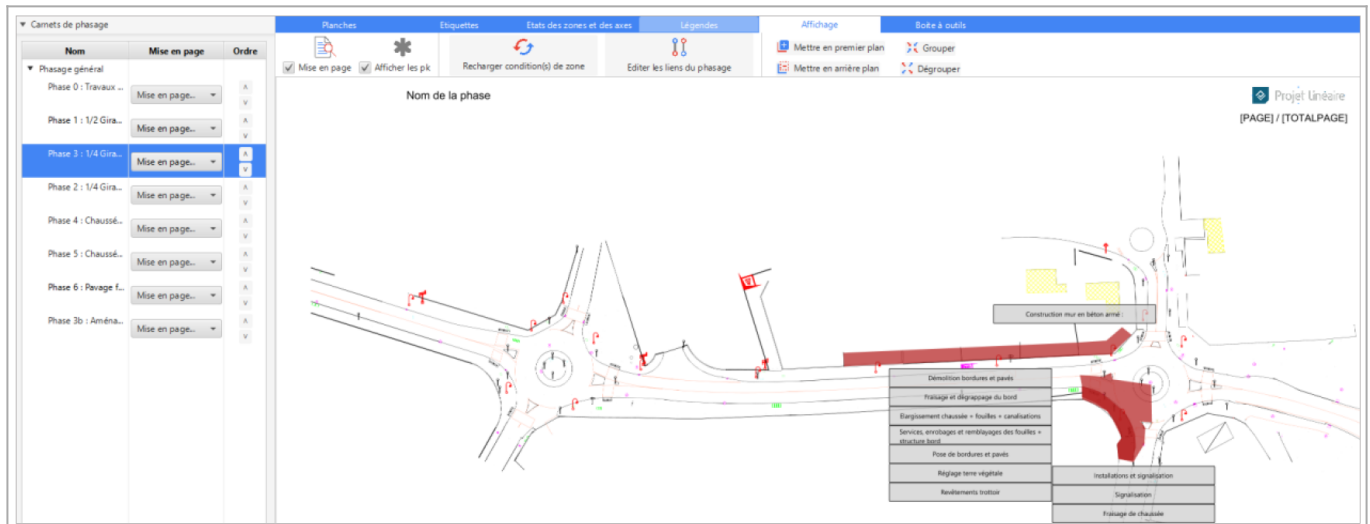


When the best placement is found by Phase Manager, the graph turns green, you can then stop the calculation and close the window:



Positioning labels automatically

The positioning of the labels has been optimized for all the pages of your phasing book.



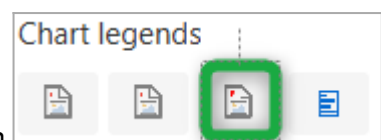
On most of the pages of your deliverable, you will find that many areas have the same color. The reason is simple, when there are several tasks of different professions on the same area during the same phase, the conflict color is used, which you can set in the labels (see Formatting table).

Add a timescale

In a phasing book it is useful to find out where you stand in time. That's what the timescale is for.

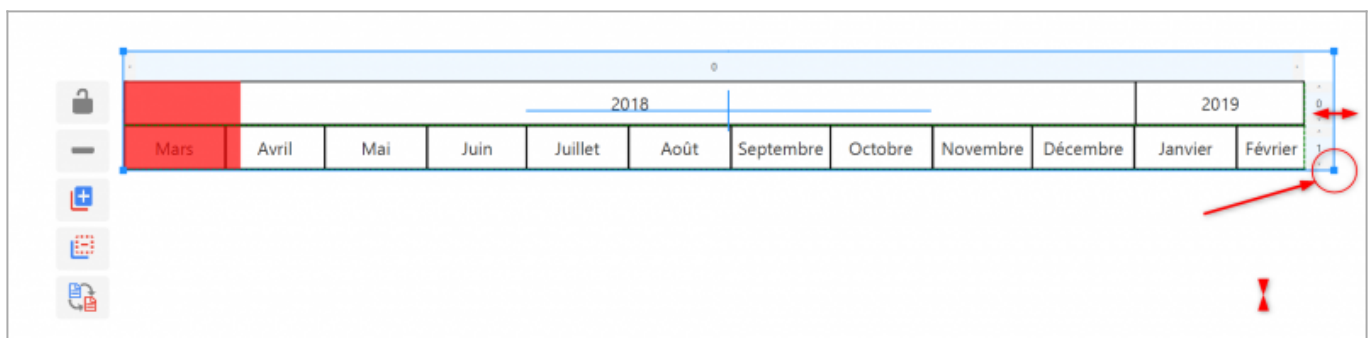
Go to the “Chart legends” tab and drag the Time scale object onto the board of your first phase.

From the “**Columns**” tab of the top panel of deliverables, it is possible to drag and drop objects such as areas legends, status legends or time scales on the boards.



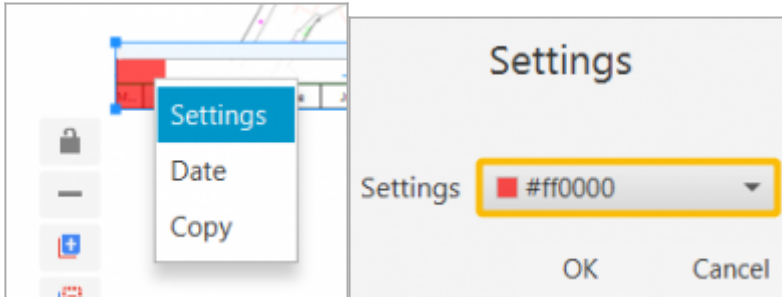
To add a time scale, you have to drag and drop the button on the board of a deliverable.

The time scale being added, it is possible to resize it with the sliders of the object:

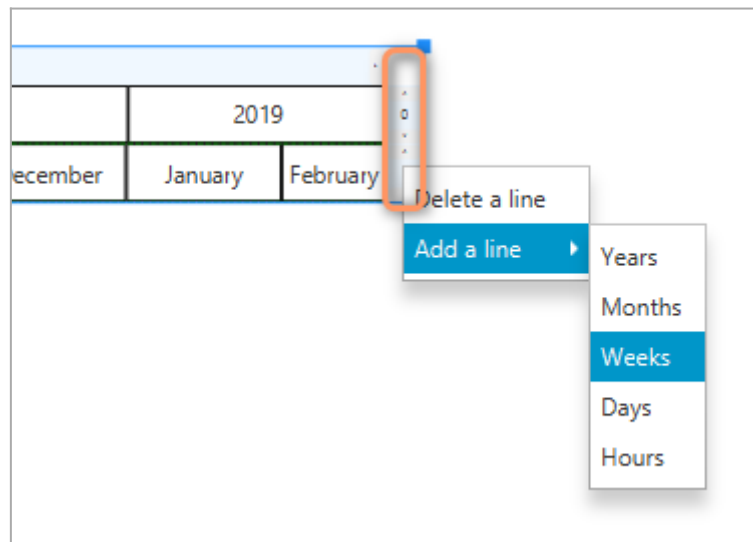


By default, the period of the board is highlighted in red and the period of the entire time scale corresponds to the period of your complete deliverable.

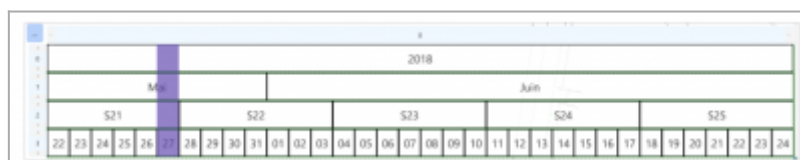
To change the color of the highlighted period, you can right-click on the highlighted area and go to Settings:




To customize the display of months/weeks/days, right-click in the right border in front of the one of the lines, then go to "Add line" then "Week" for example:



By repeating the operation, it is possible to obtain the following result:



It is possible to synchronize the time scale on all other boards, using the button  located to the left of the frieze when it is selected.

Inserting a Time scale

Integrate your Gantt

In a phasing book it is useful to visualize the sequences between tasks in a same phase. For this reason, the Gantt is precious.

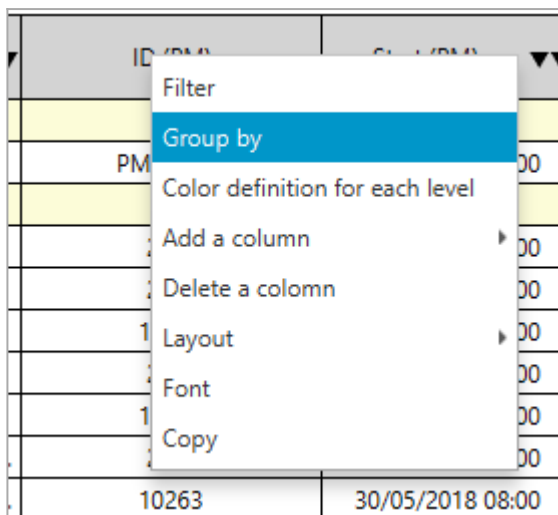
Go to the “**Columns**” tab and drag the Gantt chart object onto the board of your first phase.

Automatically, the Gantt will filter the tasks concerned by the board, and zoom in on the period of the board.

From the “**Columns**” tab of the top panel of deliverables, it is possible to drag and drop a Gantt chart onto the boards to better visualize the sequences between tasks.

Once the Gantt chart has been dragged, it is possible to customize it, by grouping or sorting tasks for example, adding frames, timelines...

To group tasks, double-click on the Gantt chart, then right-click in the header of the columns then click on **Group by** :



In the window that appears, select the desired successive group levels, then click on OK. For example, here we choose to group the tasks by Phase:

Group by

Fields :

Phase (PM)

To better highlight the grouping levels, it will be possible to add colors by right-clicking on the column headers and then **Color definition for each level**. The colours of each successive level of grouping will be defined :

anttt Activités Phases Plans Objets connectés

re Zone

Filtre Phase

Nom (PM)
Phase 0 : Travaux préparatoires
Installation de la base travaux
Phase 1 : 1/2 Giratoire Nord
Signalisation
Services, enrobages et remblayages des fo...
Réglage terre végétale
Réglage terre végétale

Couleurs des niveaux

Paramèt...

Niveau :0

Grouping tasks

Multi-criteria sorting can be applied to as many columns as desired, simply by clicking on the column headers. For example, below, we clicked once on “Start (PM)” and sorted by increasing start dates:

Nom (PM)	ID (PM)	Début (PM) ▼
Phase 0 : Travaux préparatoires		
Installation de la base travaux	PM-00001	12/02/2018 08:00
Phase 1 : 1/2 Giratoire Nord		
Installations et signalisation	2069	14/03/2018 08:00
Démolition bordures et pavés	2097	22/05/2018 08:00
Démolition bordures et pavés	10207	22/05/2018 08:00

The order (ascending or descending) of the sorting is marked by the direction of the black arrow. If you click a second time on “Start (PM)”, you will notice that the task furthest from the project is in first position, and that the arrow has changed direction (one more click on the header would have removed the filter):

Nom (PM)	ID (PM)	Début (PM) ▲
Phase 6 : Pavage final		
Couche de roulement 3B (Circulatio...	3749	21/02/2019 08:00
Couche de roulement 3A (Circulati...	3777	14/02/2019 08:00
Signalisation et travaux préparatoires	3721	08/02/2019 08:00
Phase 5 : Chaussée Sud		
Revêtements trottoir	3413	25/01/2019 08:00

It can also be seen that the decreasing order of the start dates has logically impacted the order of the phases. To maintain the increasing ordered grouping of phases, it will be necessary to apply two successive sortings:

- click on the column header “Phase (PM)” once
- and for example decide that the second sort criterion will be by decreasing end date, by double-clicking on “End (PM)”:

Nom (PM)	ID (PM)	Début (PM)	Fin (PM) ▲▲	Phase (PM) ▼
Phase 0 : Travaux préparat...				
Installation de la base tra...	PM-00001	12/02/2018 08:00	13/03/2018 16:00	Phase 0 : Travaux préparato...
Phase 1 : 1/2 Giratoire Nord				
Signalisation	2377	22/06/2018 14:10	22/06/2018 16:00	Phase 1 : 1/2 Giratoire Nord
Revêtements trottoir	18859	22/06/2018 09:55	22/06/2018 16:00	Phase 1 : 1/2 Giratoire Nord
Couche de base 3A (Circu...	2321	19/06/2018 08:00	22/06/2018 16:00	Phase 1 : 1/2 Giratoire Nord
Couche de réglage / planie	2293	14/06/2018 08:00	15/06/2018 16:00	Phase 1 : 1/2 Giratoire Nord

The number of arrows indicates the level of the sort criterion (here it is first by Phase, then by End date). Note that it is possible to position as many criteria as necessary.

Sorting tasks

To add a column, **Right-click** on a header > **Add column** : after selecting the field to display, the new column will be inserted to the right of the column on which you clicked. To delete a column, simply **right-click** > **Delete column** on the column to be removed. Finally, **to move a column**: a simple drag and drop on its header allows you to change its position.

Adding/removing/moving columns

The addition of a timeline is done by right-clicking on the timeline that will be located above the inserted line. Below we insert the week numbers under the months:

2018																
Mars																
9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25

Adding a timeline


The display of the grids is done by right-clicking on the timeline of your choice and clicking on "Show/Hide grids".

Customizing the display of a grid is also done by right-clicking on the timeline of your choice and going to "Properties".

[Displaying/modifying grids](#)

[Inserting a Gantt chart](#)

Your phasing book is finished, as is almost this tutorial !

You can now print your phasing book by clicking on the button  and following the instructions [found here in the documentation](#).