

## Tasks management

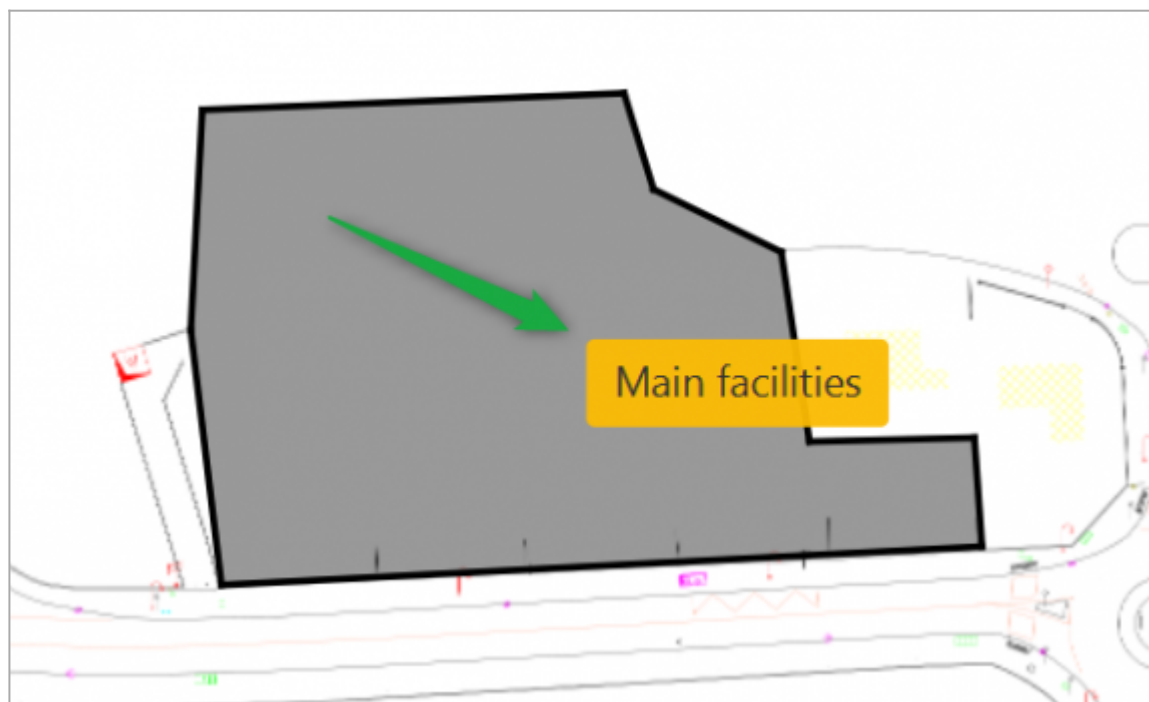
Create phasing

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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
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AddEditDelete

Click on **Add** then fill in the fields '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 défaut	Installation
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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	08	: 00
End date	12/11/2020	15	: 00

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:

The screenshot shows the 'Gantt chart' tab selected. On the left, under 'My Project ()', there is a subproject 'Sous-projet par défaut...'. In the main task list, there is a table with columns 'Name (PM)', 'Start', 'Advanced Filter', and 'Between'. The table contains two rows: 'Sous-projet par défaut' and 'Construction Facilities'. A green arrow points from the subproject in the left panel to the '+ Add a task' button in the top right of the task list.

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 <input type="text"/>	Start Between	End Strict	12/23/2020 12/23/2020	12 : 34 12 : 34	Advanced Filter	Affichage des activités : Default color	+
Name (PM)	ID (PM)	Start (PM)	End (PM)	2020 December			
▼ Sous-projet par défaut	PM-00001	16/03/2020 08:00	11/12/2020 15:00				
Construction Facilities	PM-00002	16/03/2020 08:00	11/12/2020 15:00				
Phase 1 : 1/2 ROUNDABOUT North	1	14/12/2020 08:00	23/12/2020 15:00				

## 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 Platform							
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 structure
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 levelling	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 structure
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 → 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 task, 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	B	C	D
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  ☐ 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 Tasks importation ☒ Column name is in my clipboard selection.

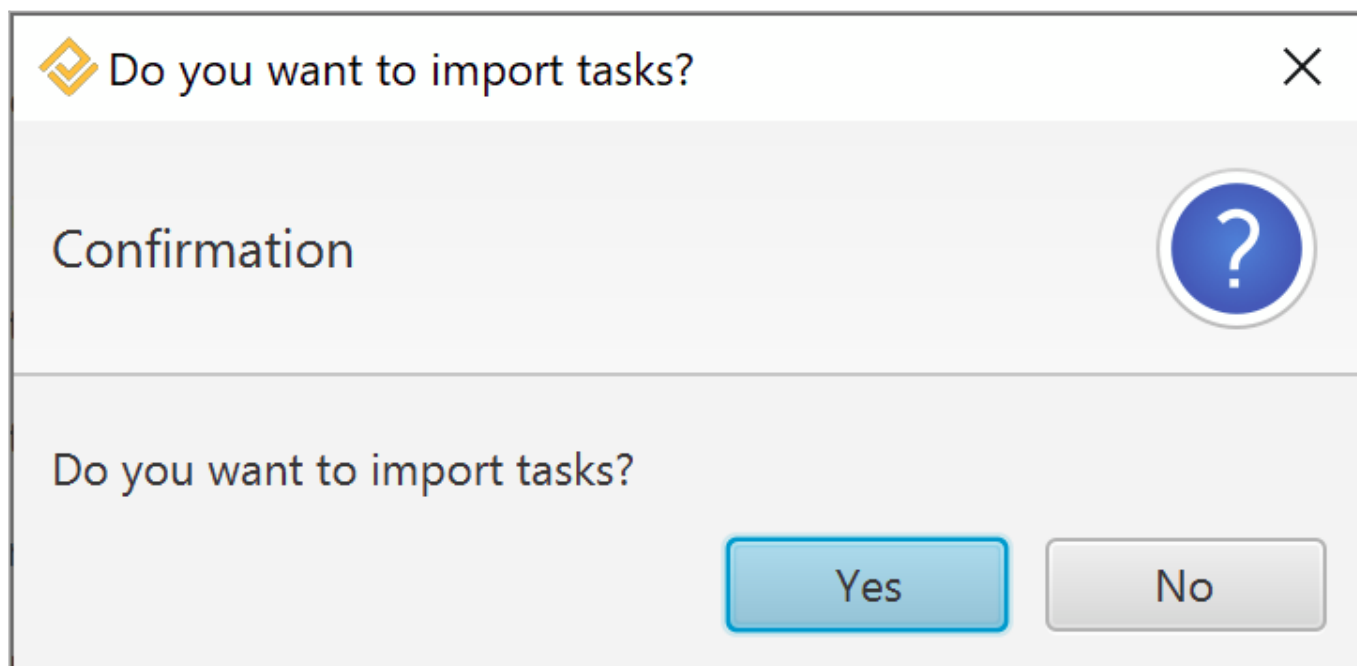
Date format  ☐ Ignore hours

Tasks			
<input checked="" type="checkbox"/> Import tasks			
ID	<input type="text" value="ID"/>	Progress	<input type="text" value="Ignore"/>
Parent ID	<input type="text" value="Parent"/>	Description	<input type="text" value="Ignore"/>
Name	<input type="text" value="Name"/>	Quantity	<input type="text" value="Ignore"/>
Calendar	<input type="text" value="Calendar"/>	Quantity unit	<input type="text" value="Ignore"/>
Start date	<input type="text" value="Start"/>	Workrate	<input type="text" value="Ignore"/>
End date	<input type="text" value="End"/>	Time unit	<input type="text" value="Ignore"/>

**Additional fields**

Name	Value	Impact	Impact type	Execution	Full axis	Start distance
Area-1	<input type="text" value="Area"/>	<input type="text" value="Ignore"/>	<input type="text" value="Ignore"/>			
Style par déf...	<input type="text" value="Task Te..."/>					

You see that the fields from your 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.
[2,G] [ Warning ]	Incorrect zone value, value ignored.
[3,G] [ Warning ]	Incorrect zone value, value ignored.
[4,G] [ Warning ]	Incorrect zone value, value ignored.
[5,G] [ Warning ]	Incorrect zone value, value ignored.
[6,G] [ Warning ]	Incorrect zone value, value ignored.
[1,F] [ Warning ]	Calendar is empty. Default value: (default calendar)
[1,D] [ Warning ]	Start date is empty or invalid. Default value: (today's date)
[1,E] [ Warning ]	End date is empty or invalid. Default value: (today's date)
[2,F] [ Warning ]	Calendar is empty. Default value: (default calendar)
[2,D] [ Warning ]	Start date is empty or invalid. Default value: (today's date)
[2,E] [ Warning ]	End date is empty or invalid. Default value: (today's date)
[3,F] [ Warning ]	Calendar is empty. Default value: (default calendar)
[3,D] [ Warning ]	Start date is empty or invalid. Default value: (today's date)
[3,E] [ Warning ]	End date is empty or invalid. Default value: (today's date)
[4,F] [ Warning ]	Calendar is empty. Default value: (default calendar)
[4,D] [ Warning ]	Start date is empty or invalid. Default value: (today's date)
[4,E] [ Warning ]	End date is empty or invalid. Default value: (today's date)
[5,F] [ Warning ]	Calendar is empty. Default value: (default calendar)
[5,D] [ Warning ]	Start date is empty or invalid. Default value: (today's date)
[5,E] [ Warning ]	End date is empty or invalid. Default value: (today's date)
[6,F] [ Warning ]	Calendar is empty. Default value: (default calendar)
[6,D] [ Warning ]	Start date is empty or invalid. Default value: (today's date)
[6,E] [ Warning ]	End date is empty or invalid. Default value: (today's date)

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 Tasks Connected objects on selected drawing

**Name (ID)** + Area Filter

▼ My project ()

▼ Sous-projet par défaut (PM-00001) - Default

- Phase 1 : 1/2 ROUNDABOUT North (1)
- Phase 2 : 1/4 ROUNDABOUT East (2)
- Phase 3 : 1/4 ROUNDABOUT West (3)
- Phase 3b : ROUNDABOUT Central Platform (31)
- Phase 4 : Road - North Lane (4)
- Phase 5 : Road - South Lane (5)
- Phase 6 : Final Paving (6)

Start End 12/23/2020 12/23/2020

Between Strict

Name (PM)	ID (PM)	Start (PM)
▼ Sous-projet par défaut	PM-00001	17/04/2019 08:00
▶ Phase 1 : 1/2 ROUNDABOUT North	1	17/04/2019 08:00
▶ Phase 2 : 1/4 ROUNDABOUT East	2	26/06/2019 08:00
▶ Phase 3 : 1/4 ROUNDABOUT West	3	24/07/2019 08:00
▼ Phase 3b : ROUNDABOUT Centra...	31	26/08/2019 08:00
Roundabout central platform I...	7798	26/08/2019 08:00
▼ Phase 4 : Road - North Lane	4	20/09/2019 08:00
Base layer	3105	15/11/2019 08:00

## 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	<input type="checkbox"/>	20.2	20.7	<input checked="" type="checkbox"/>	0.1	0.1	<input type="checkbox"/>
V2	Fixe	<input type="checkbox"/>	20.2	20.7	<input type="checkbox"/>	0.0	0.0	<input checked="" type="checkbox"/>
Ajouter...		<input type="checkbox"/>	0.0	0.0	<input type="checkbox"/>	0.0	0.0	<input type="checkbox"/>

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' → 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 :

