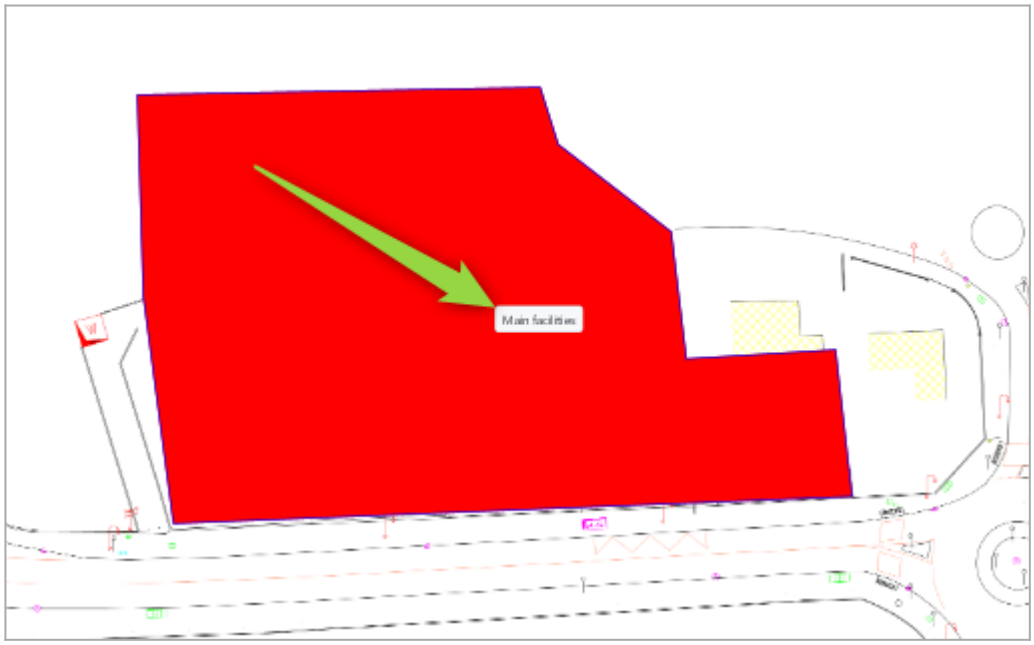
Tasks management

Create phasing

Adding tasks

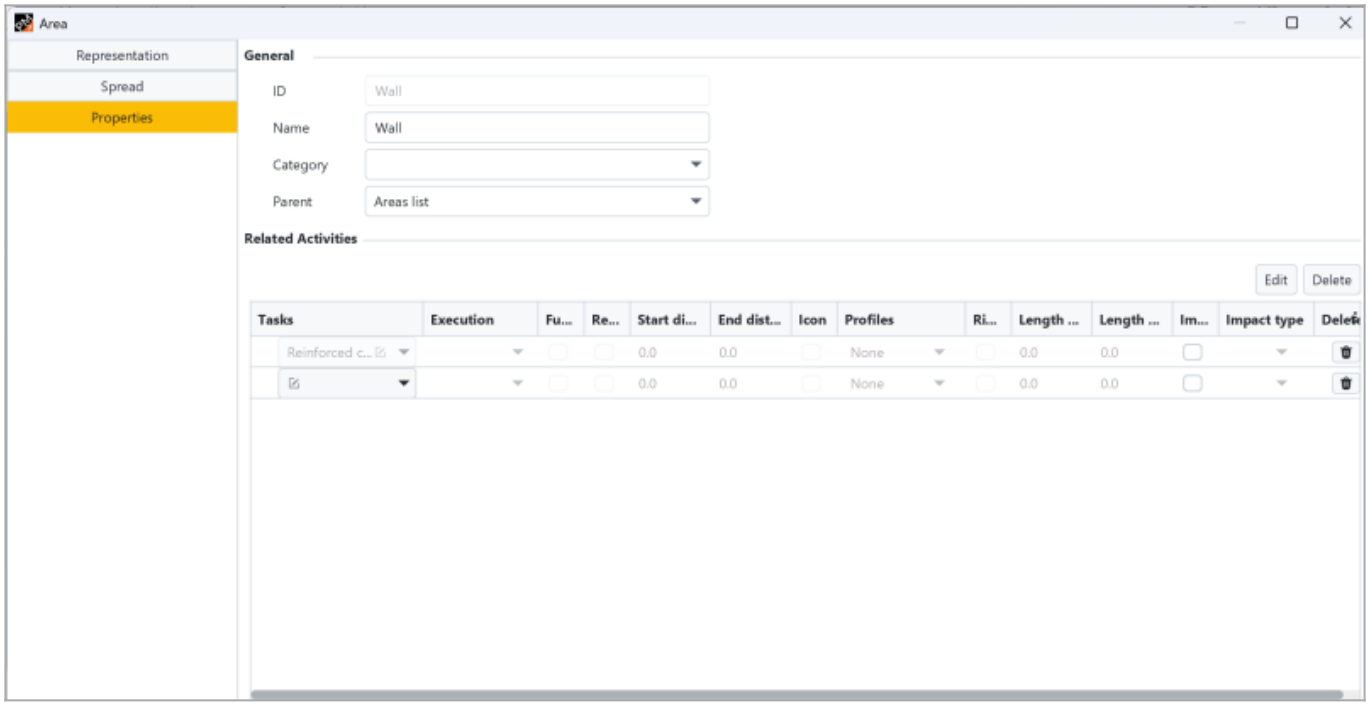
Simple addition of a task directly to an area

Click on the area label (here “Main facilities”) :

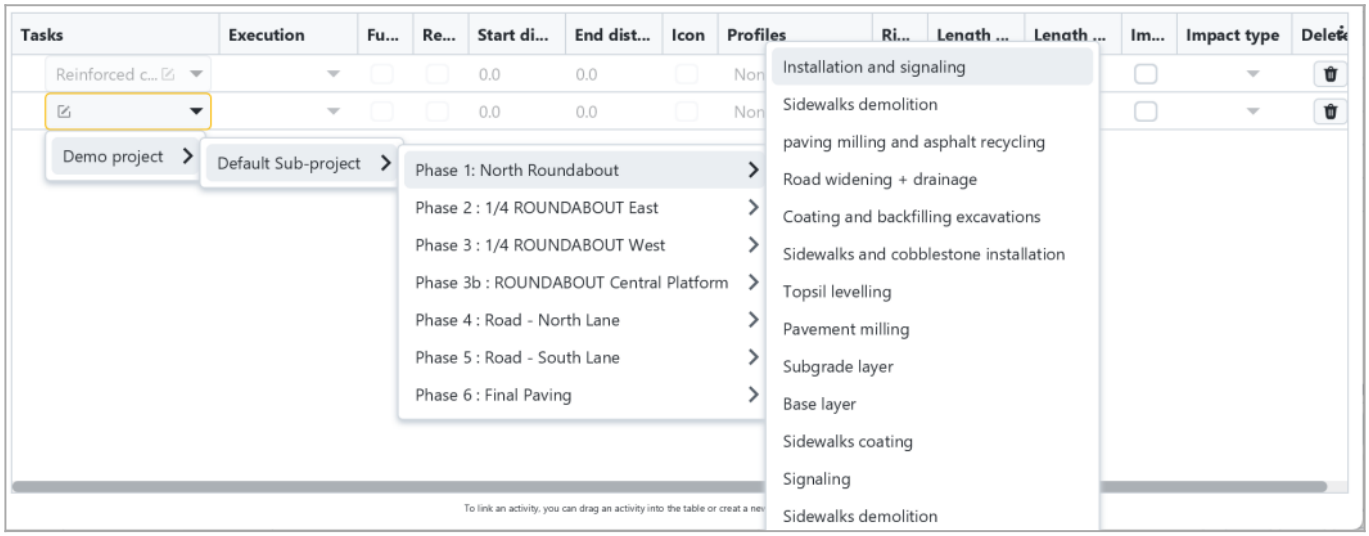


The following window pops up:

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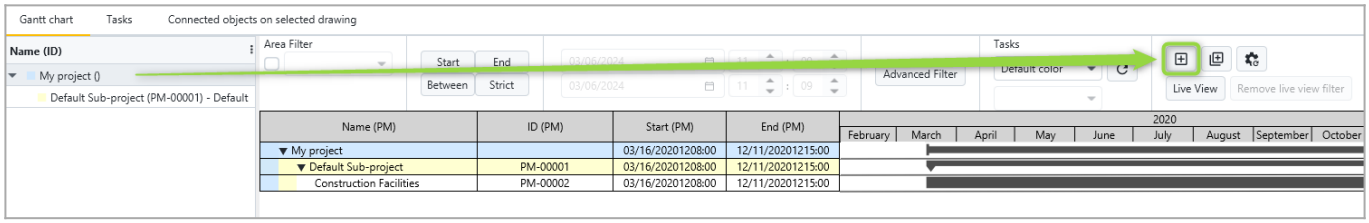
Select the activity you want to associate:



Your task is now associated with the area.

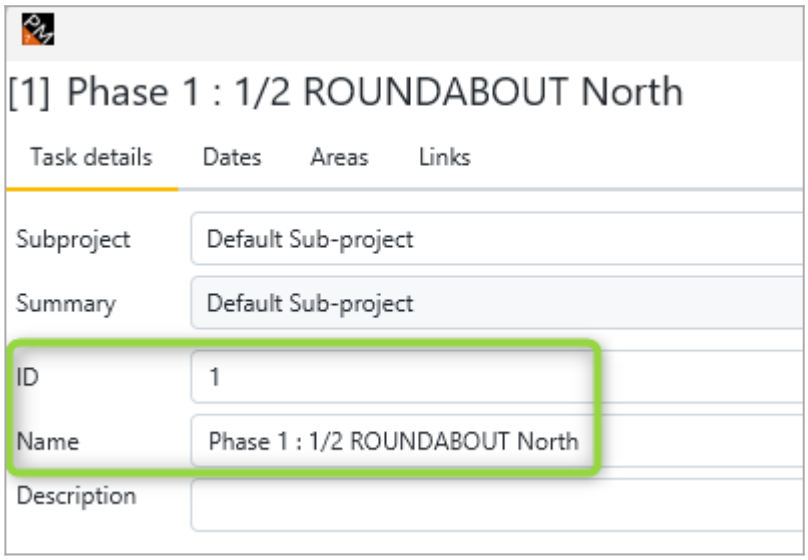
Creation of summary tasks

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

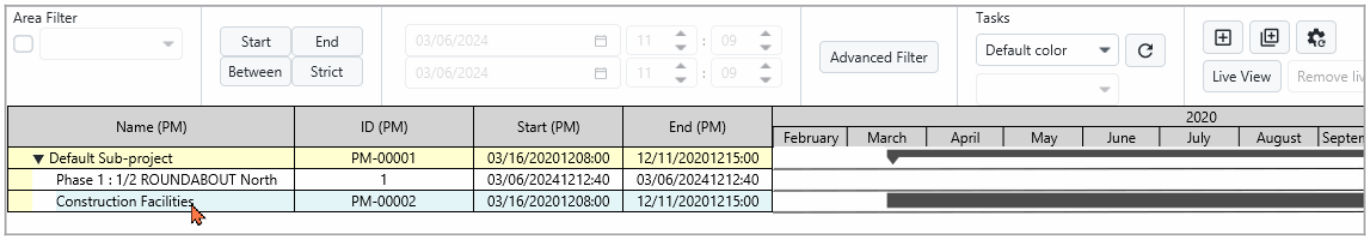


In this example we'll create the following summary task:

- name: “Phase 1 : 1/2 ROUNDABOUT North”
- ID: '1'



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:



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

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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 tasky, the subproject (here PM-00001) is then mentioned, which is therefore here the parent of the summary tasks.

Go to the menu ***Options > Import tasks/links*** .

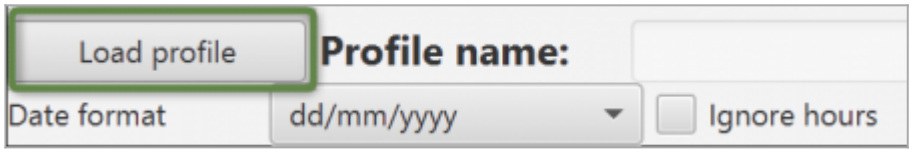
In the import window that opens, insert the data from the clipboard by clicking on the ***Paste*** button:



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).

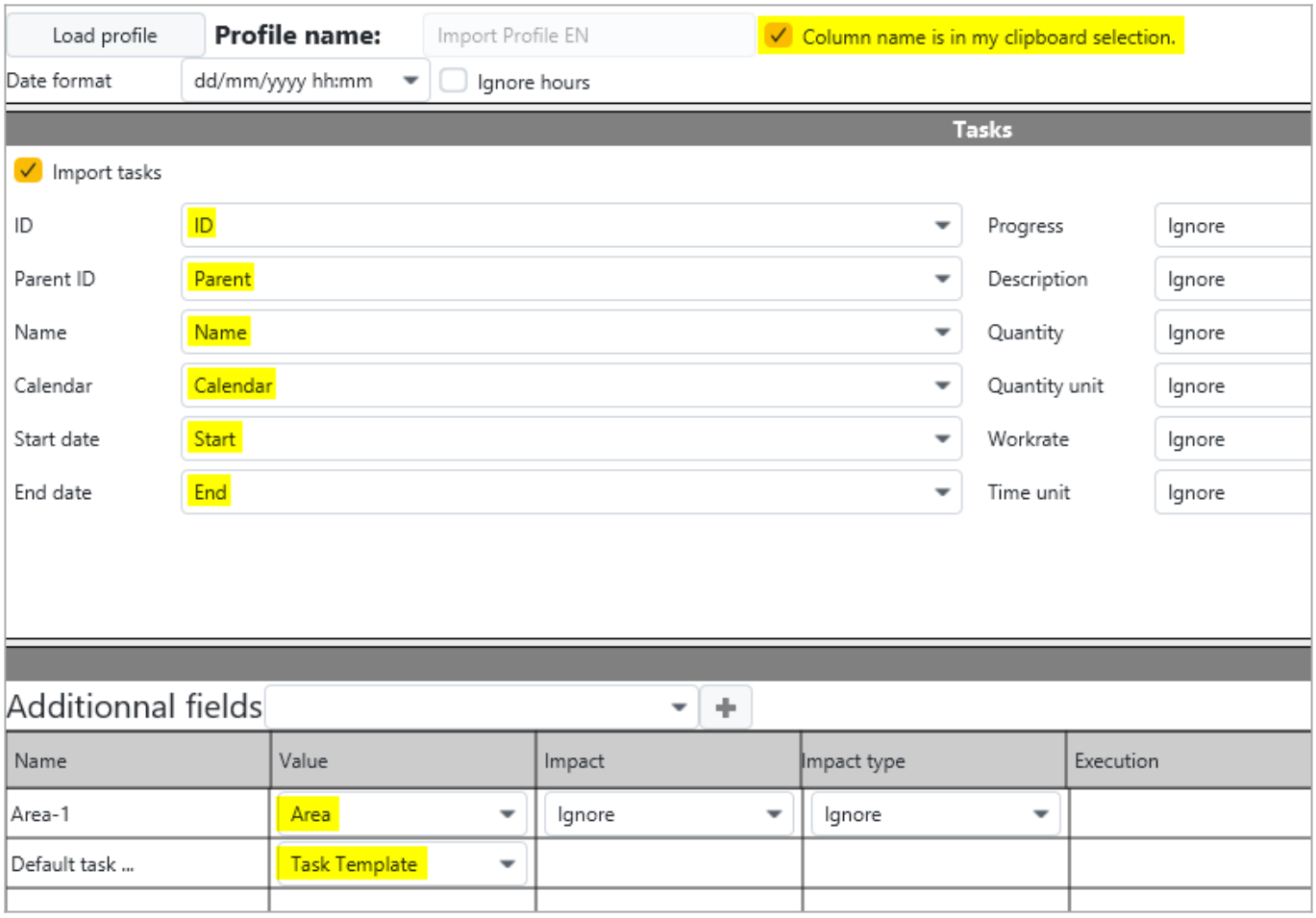
Click on the ***Load profile*** button:



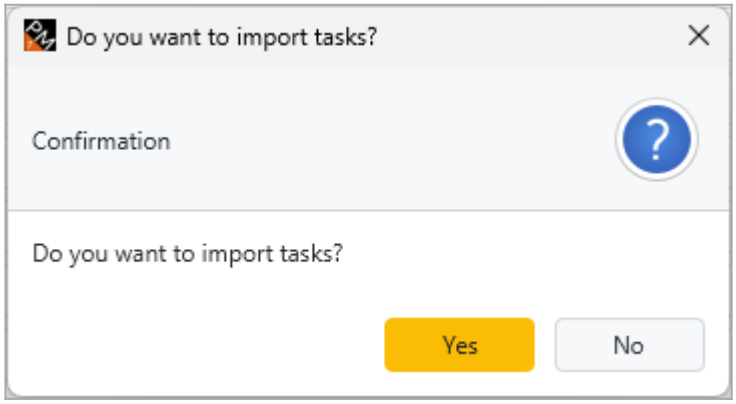
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85 000 LA ROCHE-SUR-YON
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Then browse your hard drive for the exchange profile and click on ***Open*** .

Then check that the display is as follow:



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 :

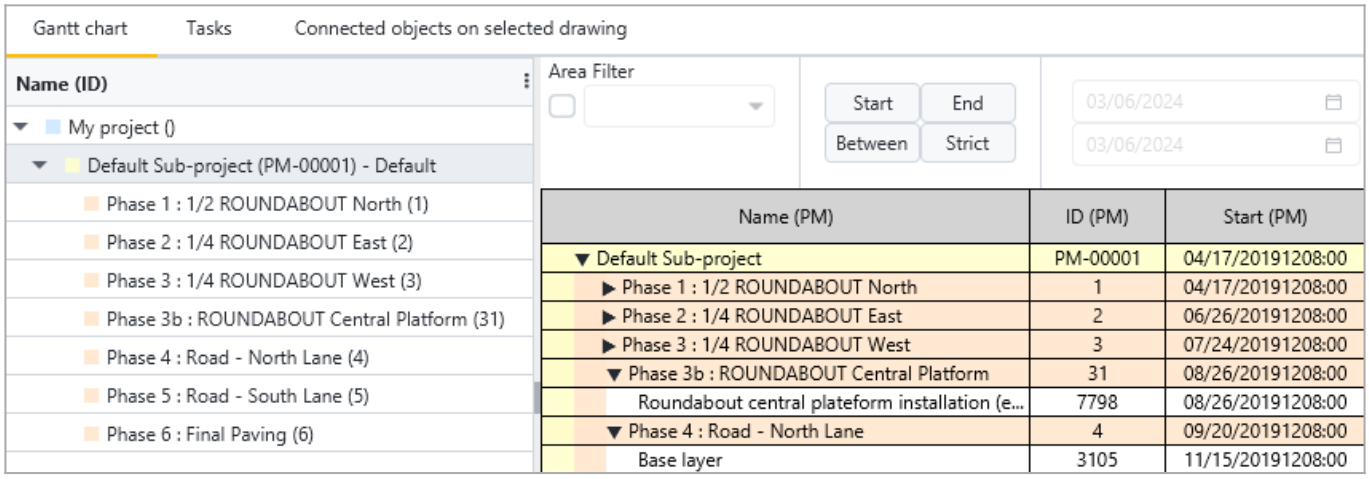


Note on the warning window:
A window tells you that some fields have not been imported:this is informative, and concerns the empty

fields “Area” and “Dates” for the summary tasks; Area having no meaning, and Dates are inherited from its child tasks:

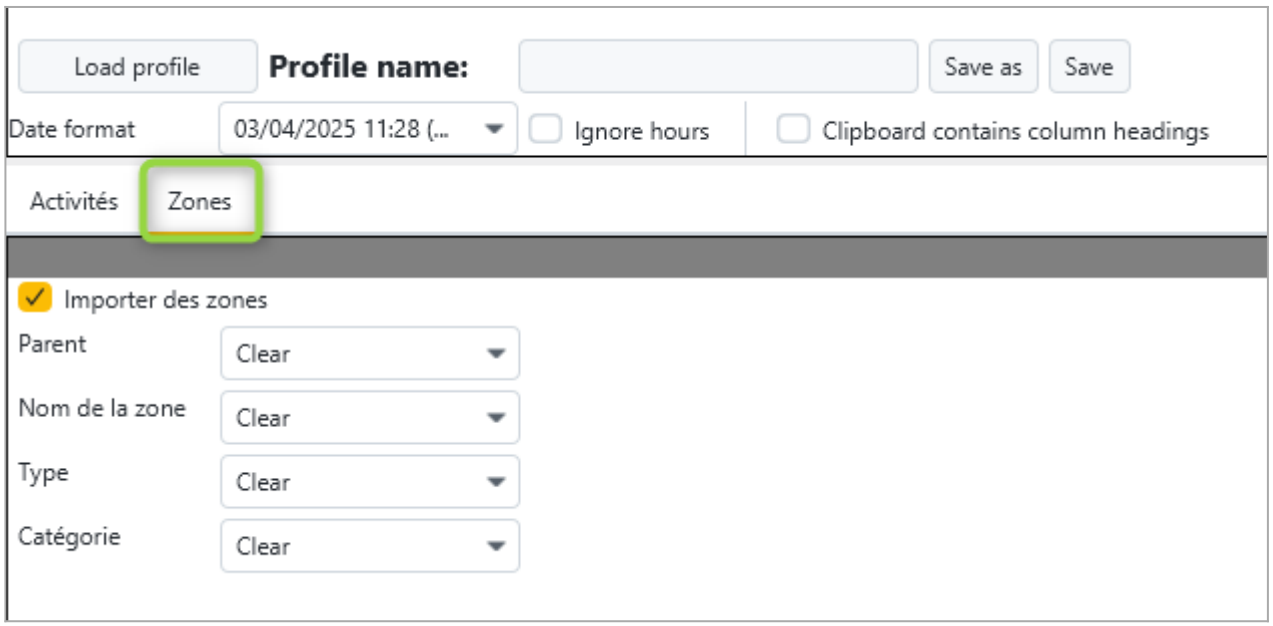


After closing the import window, you can see that tasks have been imported, and that the WBS matching our imported phases has been created:



Areas & axes import

You can import import your areas and axes. Click on the button Areas in the Import interface

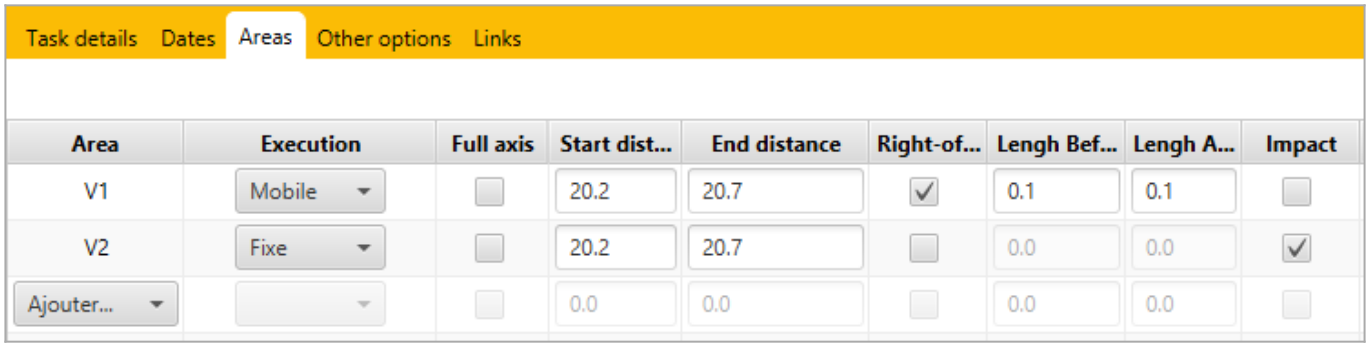


Multizone, impact, right-of-way (RoW) and execution mode

Phase Manager 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 :

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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.

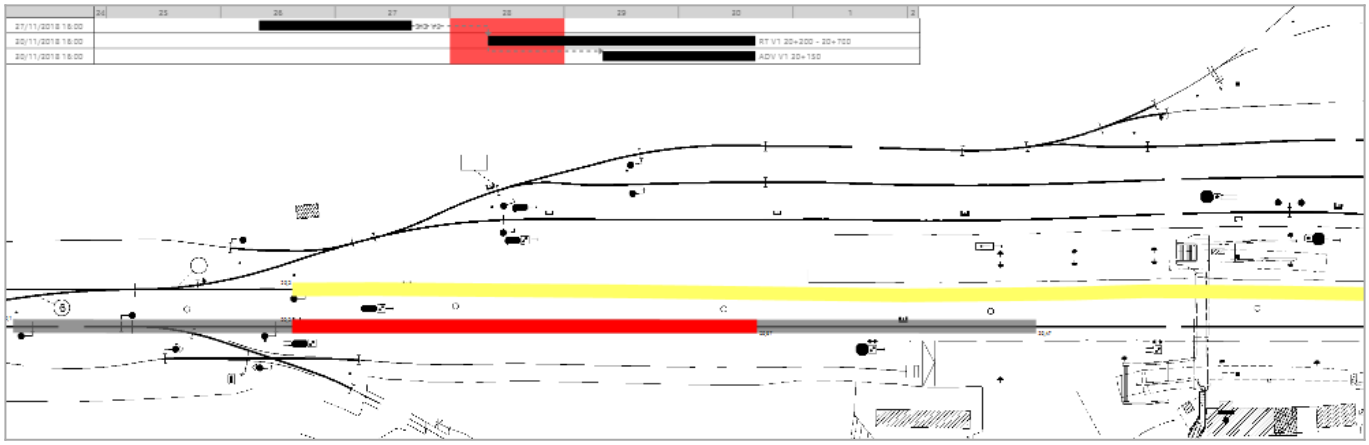
V1 axis :

- '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..

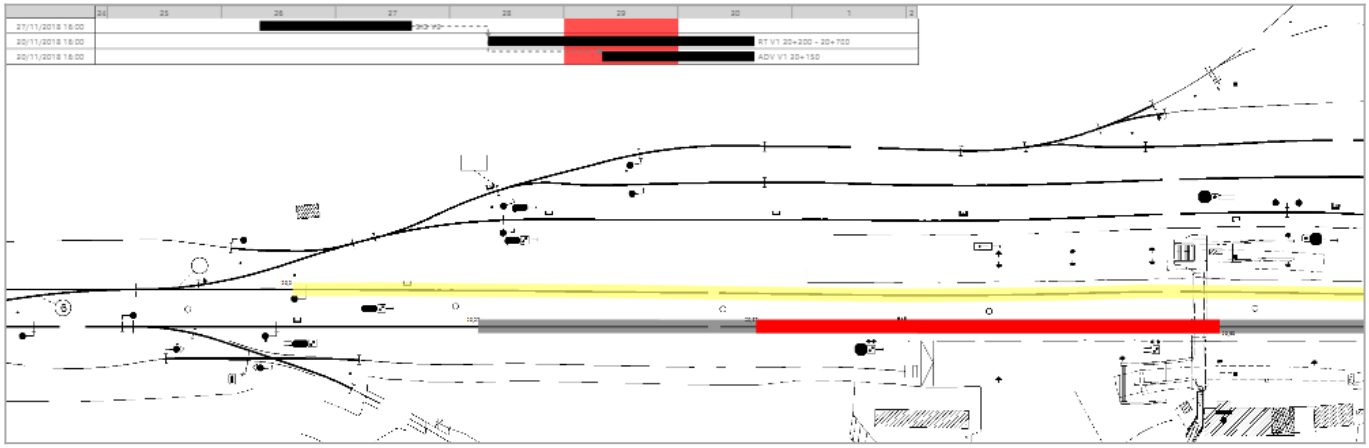
On the first two daily pages of the considered 3-day sequence, we can visualize:

- 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 :



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12 impasse Bernard Lyot
85 000 LA ROCHE-SUR-YON
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support@projetlineaire.com