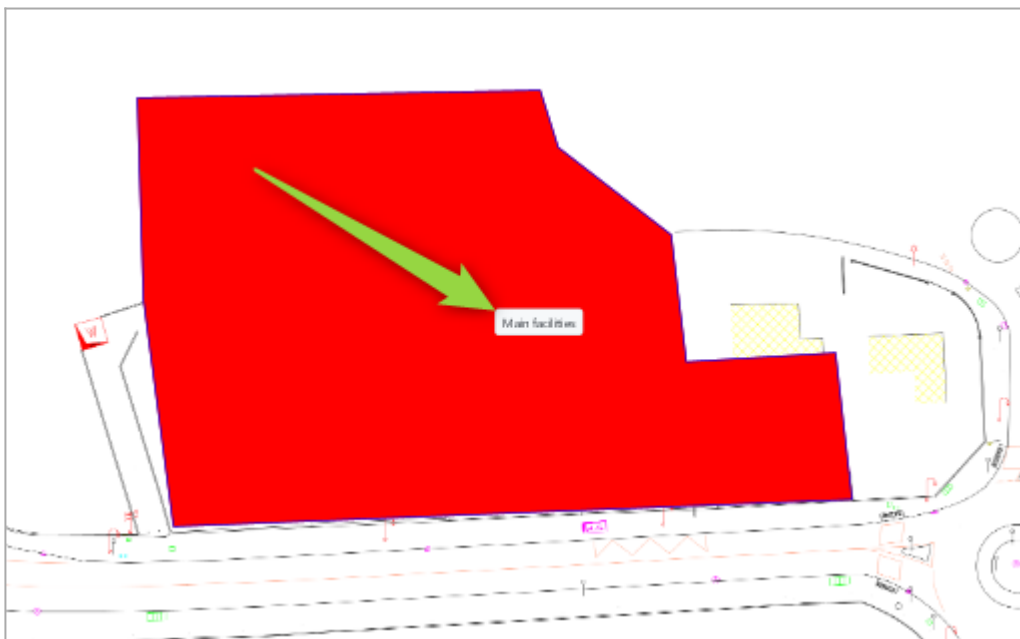# Tasks management

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:

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:

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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**:
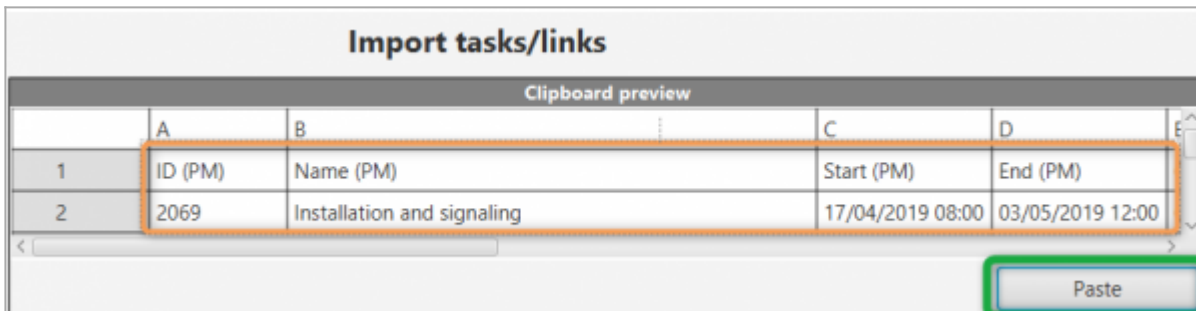

Explanations:

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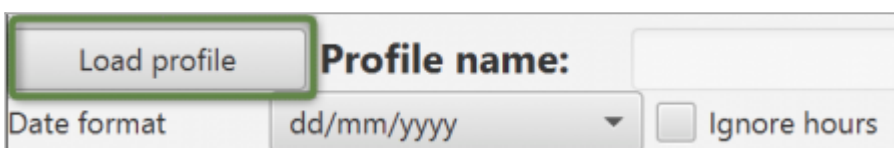
The preview area shows you that the data has been read from the clipboard. You can then assign each column to a Phase Manager field, either manually or by importing an existing exchange profile.

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

Click on the **Load profile** button:

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:

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:

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 :

Area	Execution	Full axis	Start dist...	End distance	Right-of...	Lengh Bef...	Lengh A...	Impact
V1	Mobile ▼	☐	20.2	20.7	☑	0.1	0.1	☐
V2	Fixe ▼	☐	20.2	20.7	☐	0.0	0.0	☑
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' → 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 :

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Day 2 :