

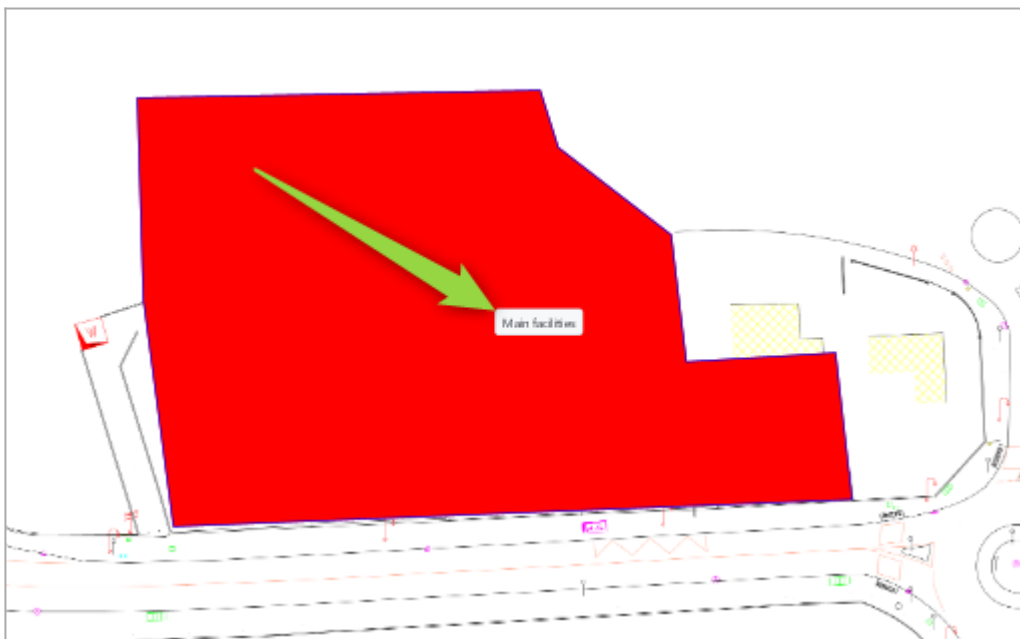
## Tasks management

Create phasing

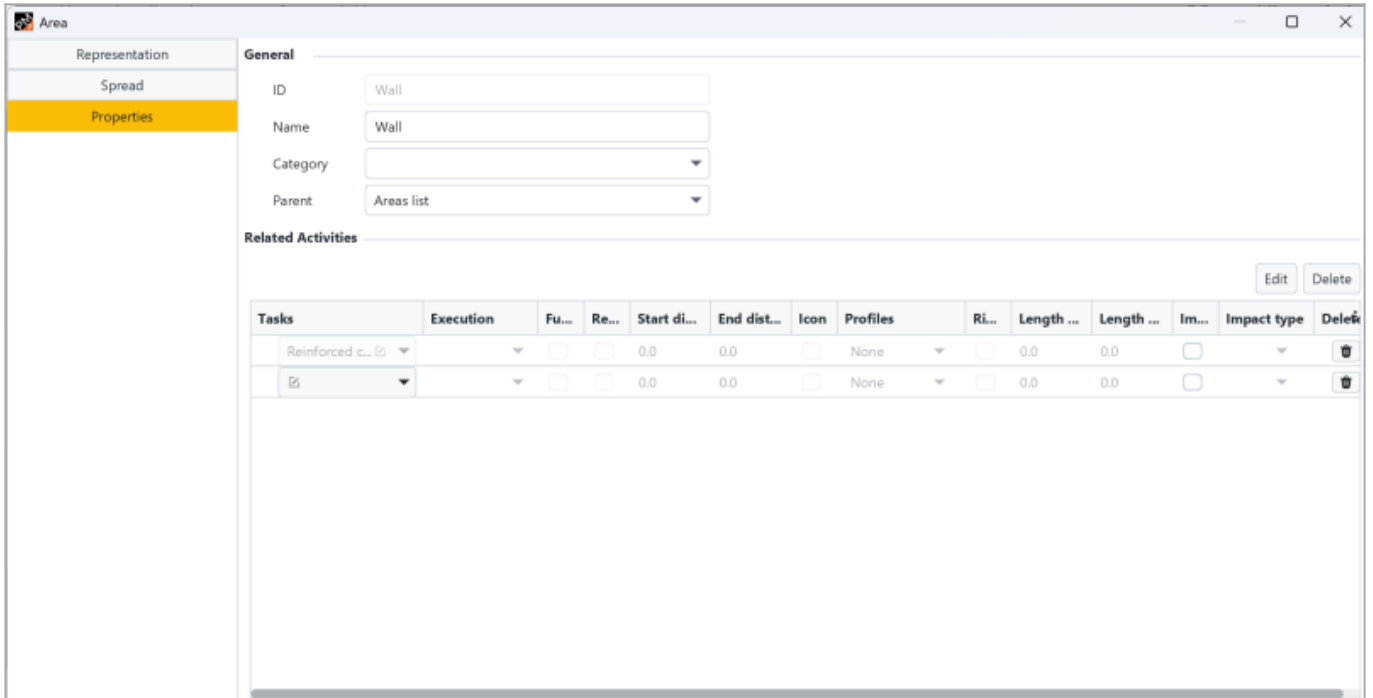
### Adding tasks

#### Simple addition of a task directly to an area

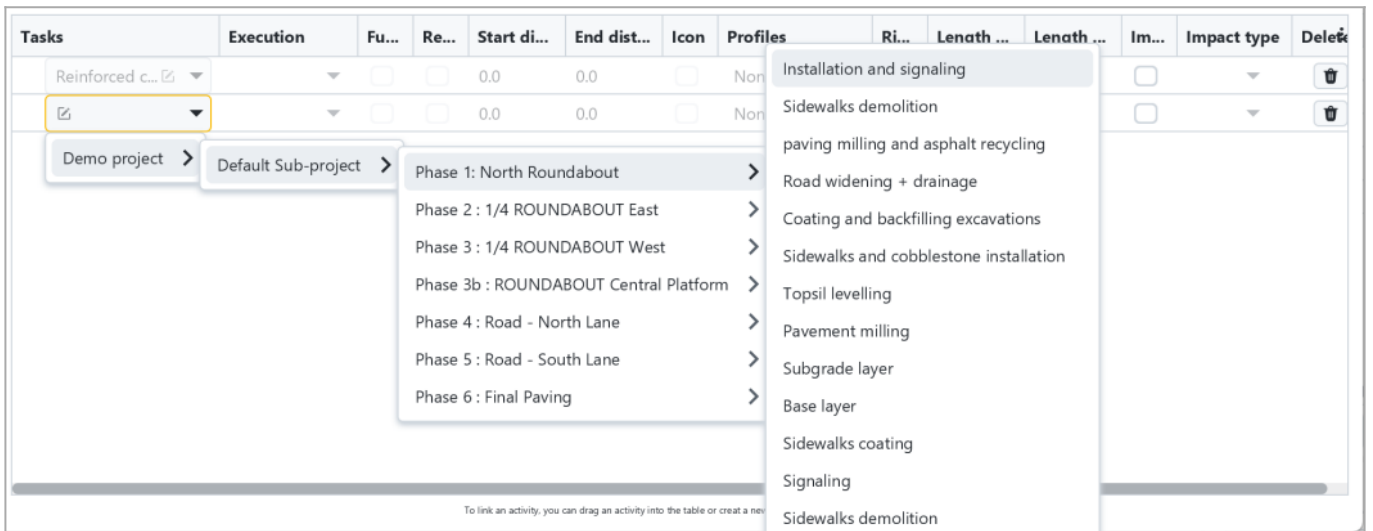
Click on the area label (here “Main facilities”) :



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:

Gantt chart Tasks Connected objects on selected drawing

Name (ID) Area Filter Start End 03/06/2024 11 : 09 Advanced Filter Tasks Default color Live View Remove live view filter

Name (PM)	ID (PM)	Start (PM)	End (PM)	2020													
				February	March	April	May	June	July	August	September	October					
▼ My project		03/16/20201208:00	12/11/20201215:00														
▼ Default Sub-project	PM-00001	03/16/20201208:00	12/11/20201215:00														
Construction Facilities	PM-00002	03/16/20201208:00	12/11/20201215:00														

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 Default Sub-project

Summary Default Sub-project

**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 Start End 03/06/2024 11 : 09 Advanced Filter Tasks Default color Live View Remove live view filter

Name (PM)	ID (PM)	Start (PM)	End (PM)	2020													
				February	March	April	May	June	July	August	September	October					
▼ Default Sub-project	PM-00001	03/16/20201208:00	12/11/20201215:00														
Phase 1 : 1/2 ROUNDABOUT North	1	03/06/20241212:40	03/06/20241212:40														
Construction Facilities	PM-00002	03/16/20201208:00	12/11/20201215:00														

## 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 **Options > 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	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   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:** Import Profile EN
✔ 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	Impact	Impact type	Execution
Area-1	Area	Ignore	Ignore	
Default task ...	Task Template			

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 :

Do you want to import tasks?
✕

Confirmation

Do you want to import tasks?

Yes
No

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	Start	End
▼ My project ()	<input type="checkbox"/>	Start	End
▼ Default Sub-project (PM-00001) - Default	<input type="checkbox"/>	Between	Strict
Phase 1 : 1/2 ROUNDABOUT North (1)			03/06/2024
Phase 2 : 1/4 ROUNDABOUT East (2)			03/06/2024
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)			
Name (PM)	ID (PM)	Start (PM)	
▼ Default Sub-project	PM-00001	04/17/2019 12:08:00	
▶ Phase 1 : 1/2 ROUNDABOUT North	1	04/17/2019 12:08:00	
▶ Phase 2 : 1/4 ROUNDABOUT East	2	06/26/2019 12:08:00	
▶ Phase 3 : 1/4 ROUNDABOUT West	3	07/24/2019 12:08:00	
▼ Phase 3b : ROUNDABOUT Central Platform	31	08/26/2019 12:08:00	
Roundabout central platform installation (e...	7798	08/26/2019 12:08:00	
▼ Phase 4 : Road - North Lane	4	09/20/2019 12:08:00	
Base layer	3105	11/15/2019 12:08:00	

## Areas & axes import

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

Load profile

**Profile name:** 
Save as Save

Date format
03/04/2025 11:28 (...)
 Ignore hours
 Clipboard contains column headings

Activités
Zones

Importer des zones
 

Parent

Nom de la zone

Type

Catégorie

## 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 ▾	<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 :**

