Trimble Unity Construct - Schedule Setup Guide

September 2024

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Schedule

Have you ever worked on a project where 100% of the time the projects had schedules that were kept updated; where at any time on any given day you could know the exact status on any project you choose, or of all the projects? No? That's the way it is for most people, but that's where Trimble Unity Construct can help.

A Programmatic Perspective

Trimble Unity Construct supports the different team members that are involved in the project. Using the Schedule module helps ease the hectic nature associated with managing large scale schedules across multiple projects. Trimble Unity Construct scheduling gives schedule managers and account administrators a single system that helps them coordinate various activities and people in order to actualize specific goals. Scheduling allows you to view the project at a high level and organize the details that need to be completed to ensure project success. Trimble Unity Construct's Schedule is ideal for owners, as well as developers, program managers, and construction managers managing multiple projects in various stages of development, from planning, through design, procurement and construction.

Schedule Management

The system allows team members to access and update the schedule in real time. This keeps all project participants and stakeholders up-to-date on all changes as they happen. And, as each individual team member marks their tasks complete on a project, the schedule is automatically updated and maintained, minimizing administrative work for the project manager. With up-to-date and accurate information at your fingertips, you will be able to make informed, faster decisions thereby improving the scheduling process and mitigating risk.

Identifying Critical Paths

As team members update their tasks, the system will calculate the durations of each of the paths through a project, identify the critical paths, and give the project duration. Trimble Unity Construct will help to ensure that the shortest path to complete the project is taken. This gives the project manager the ability to specify what must be done, and by when to ensure a successful project outcome.

About Schedule Settings

Configuring Schedule settings allow account administrators to set the framework for this module. Schedule settings consist of the following main tasks:

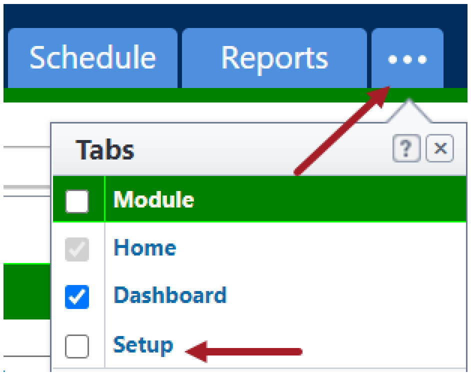
- Creating master tasks and master processes
- Setting up the schedule calendar
- Adding schedule custom fields
- Determine whether or not the baseline can be re-saved
- Determine whether or not the schedule will be linked to the project's start and end dates
- Create schedule templates

Access Schedule Settings

To access the Schedule settings

1. From the top navigation tabs, click the **Setup** tab or from the Utility menu by clicking the drop-down arrow next to your user name.

   If the Setup tab is not visible, click , and then select the **Setup** check box.

2. In the **Administration Tools** section, click **Schedule**.

   All Schedule related settings are displayed.

Master Processes and Master Tasks

Master Processes

Master Processes are created to categorize and report on Master Tasks. Having master processes allows you to standardize the different types of tasks that might exist across all of your projects for reporting purposes. In some cases, only a single master process might be necessary. Project schedules use these processes to filter and view activities in the schedule that are linked to certain master tasks.

The Master Processes page allows you to add new master processes and make changes to existing ones. Master Processes are created to categorize and report on Master Tasks. Having master processes allow you to standardize the different types of tasks that might exist across all of your projects for reporting purposes. After creating a master process, you'll have to associate master tasks to it so that when schedule managers identify their summary tasks as one of these master tasks that you've created, the association would have already been established, which will strengthen the value of your reports.

The following topics will help you manage master processes:

- Add Master Processes
- Edit Master Processes
- Delete Master Processes

Master Tasks

Note: The terms master tasks and master activity are used synonymously in the user interface.

Master tasks are created by the account administrator and used to identify similar project phases that may be referred to by different names across multiple projects.

For example, one project might use the term, "closeout" and others may use "final completion", "project close out" or "closeout/ occupancy". The master task is a unique identifier that unifies all of these project phases so that account administrators and executives can report on the status of these phases across all projects. All master tasks have a numerical prefix that allows you to link similar project phases to one another.

From the View Master Process page you will be able to link master processes to master tasks so that when schedule managers identify their summary tasks as one of these master tasks, the association would have already been established, which will strengthen the value of your reports.

Add Master Process

Master processes are used to categorize and report on master tasks. This gives administrators the ability to report across projects by phases or tasks. Having master processes allows you to standardize the different types of tasks that might exist across all of your projects. In most cases, only a single master process is created. Project schedules use these processes to filter and view activities in the schedule that are linked to certain master tasks. After creating the master process, you will have to add master tasks to it.

To add master processes

1. Open Schedule settings.
2. Click **Master Processes/ Tasks**. The Master Processes page is displayed.
3. Click **Add**. The Add Master Process page is displayed.
4. Complete all necessary fields (marked with an *):
    - **Process Name***: Enter a name for the master process.
    - **Process Number***: Enter the process number. Master process numbers cannot be duplicated.
    - **Status***: Select a status for the master task. By default, the Active radio button is selected, which will make the task available to users. Select disabled keep this task as a draft version that can be made active later on.
    - **Description**: Enter a description for the master task.
5. Click **Save** to save the master process.
   —Or—
   Click **Cancel** to disregard changes. Unsaved changes will be lost.

View Master Processes

This page allows you to view the details of a master process including its associated master tasks.

You can also add master tasks to master processes from here. For more information, see About Master Processes and Master Tasks.

To view a master process

1. Open Schedule settings.
2. Click **Master Processes/ Tasks**. The Master Processes page displays.
3. Click the name of the process you want to view. The View Master Process page displays.

4. You can perform any of the following actions from this page:
   - **Update**: Click this button to make changes to the details of the master process or to the details of any of the associated master tasks.
   - **Cancel**: Click to disregard changes and navigate away from this page.
   - **Add**: Click to add new master tasks.

Edit Master Processes

Master processes can be modified by changing the process name, number, status or description.

> **Note:** You cannot delete any of the already defined master processes or master tasks that are in use. A process or task is in use if it is assigned to one or more schedule(s) in e-Builder. However, you do have the option of disabling the master process so as to prevent any new master tasks from being assigned to it.

To edit master processes

1. Open Schedule settings.
2. Click **Master Processes/ Tasks**. The Master Processes page is displayed.
3. Click the **Edit** link next to the process you want to modify. The Edit Master Process page is displayed.
4. Edit the fields as needed. Ensure that the required fields (marked with an *) are completed.
   - **Process Name***: Enter a name for the master process.
   - **Process Number***: Enter the process number. Master process numbers cannot be duplicated.
   - **Status***: Select a status for the master task. By default, the **Active** radio button is selected, which will make the task available to users. Select the **Disabled** radio button to keep this task as a draft version that can be made active later on.
   - **Description**: Enter a description for the master task.
5. Click **Save** to save the changes to the master process.
   —Or—
   Click **Cancel** to disregard changes. Any unsaved changes will be lost.

Related Topics:

- About Master Processes and Master Tasks

Delete Master Processes

> **Note:** Master processes that have already been associated with tasks in the user interface cannot be deleted unless the associated master process and tasks are also deleted.

To delete master processes

1. Open Schedule settings.
2. Click **Master Processes/ Tasks**. The Master Processes page is displayed.
3. Click the **Delete** link next to the process you want to remove. The Delete Master Process page is displayed.
4. Click **Yes, Delete**. A confirmation page is displayed

Related Topics:

- About Master Processes and Master Tasks

Master Tasks

Master tasks are a subset of master processes. They are used to identify similar project phases that may be referred to by different names across multiple projects. For example, one project might use the term, "closeout" and others may use "final completion", "project close out" or "closeout/ occupancy". The master task is a unique identifier that unifies all of these project phases so that account administrators and executives can report on the status of these phases across all projects.

For more information, see About Master Processes and Master Tasks.

Add Master Tasks to Master Processes

Linking master processes to master tasks supports the reporting needs of the program. When schedule managers associate summary tasks to one of the established master tasks, you'll be able to report on all of the master tasks and summary tasks linked to the master process.

> **Note:** Master tasks are a subset of master processes. You can link one or more of these tasks to a master process. They can only be added after you've saved the associated master process.

To add master tasks to master processes

1. Open Schedule settings.
2. Click **Master Processes/ Tasks**.
3. Click the title of the master process you want to add master tasks to. The View Master Process page is displayed.
4. Click **Add**. The Master Task page is displayed.
5. In the **Task Name** field, enter a name for the task.

   Tip

   Remember, master tasks are used to identify similar project phases across multiple projects, so it is advisable to use a generic, but descriptive name that will be easily understood by schedule managers across the program, such as Planning, Bidding or Closeout.
6. Click the **Process Number** drop-down arrow to select a process to link this task to.
7. The **Task Number** field automatically populates with a unique identifier, but you can change this number if you wish.

   > **Note:** Task numbers cannot be duplicated.
8. Click the **Task Type** drop-down arrow to specify whether this is a task or an event.

   > **Note:** Although an event is still treated as a task in regards to duration, start and finish time, an event is classified as a meeting or an approval of item(s). Specifying events gives the Schedule Manager the ability to better manage the schedule by identifying when work is actually being done versus a decision making or approval process that may or may not impact the schedule.
9. In the **Milestone** field, specify whether the task is a milestone or not.

> **Note:** A task that is considered critically important or is in the critical path of the project's success can be considered a milestone.

10. Enter a description in the **Description** field to provide clarity for schedule managers.
11. Click **Save** to save the master task.
    —Or—
    Click **Cancel** to disregard changes. Unsaved changes will be lost.

Edit Master Tasks

To edit master tasks

1. Open Schedule settings.
2. Click **Master Processes/ Tasks**.
3. Click the master process the task is associated to. The View Master Process page is displayed and a list of available master tasks display half way down the page.
4. Click the **Edit** link of the task you want to modify.
5. Make all changes to the task details as needed. Ensure that the required fields (marked with an *) are completed. The following fields are editable:
    - **Task Name***: The name of the master task.
    - **Process Number***: The master process that the task is associated with.
    - **Task Number***: Unique number for the master task that cannot be duplicated.
    - **Task Type***: Type of master task - either task or event.
    - **Milestone***: Designates the master task as a milestone or not.
    - **Description**: The description for the master task.
6. Click **Save**.

Delete Master Tasks

> **Note:** Master tasks that have already been associated with tasks in the user interface cannot be deleted unless the associated tasks are also deleted.

To delete master tasks

1. Open Schedule settings.
2. Click **Master Processes/ Tasks**.
3. Click the master process the task is associated to.
   The View Master Process page is displayed and a list of available master tasks display half way down the page.
4. Click the **Delete** link of the task you want to remove. The Delete Master Task page is displayed.
   A confirmation page is displayed.
5. Click **Yes, Delete**.

Manage Resources with Cost

Resource Management

The Resource Management with Cost module provides you with the ability to:

- **Capture accurate resource costs** – Easily and consistently capture accurate resource rates for staff, apply the labor burden, and then load resources onto tasks. Project Managers will not have to use “ballpark estimates” or “rule of thumb percentages” to assess self-performance costs any more.
- **Link resources or schedule tasks to budget line items** – At the project level, select whether to link schedule tasks or link resources to budget line items, and view real-time resource costs in the project Cost Summary.
- **Eliminate hidden soft costs** – With visibility of resource costs in the project Cost Summary, managers can evaluate their true available Budget for external contracts.
- **Track remaining resource costs as payroll costs are entered** – As actual payroll costs are entered from the ERP system, remaining resource costs adjust accordingly, providing highly accurate total project cost at completion.

> **Note:** This new module is available at an additional Cost. Please contact your Account Manager for pricing.

Configuring Resource Management with Cost

Using the Manage Resources page, Trimble Unity Construct Administrators can configure resource management.

Configure Resource Management with Cost

As the Account Administrator, you can manage your resources. These resources are created at the account level and are available for assignment to project tasks.

To open the Manage Resources page

1. Open Schedule settings.
2. In the Administration Tools section, expand **Schedule**.
3. Click **Manage Resources**. The Manage Resources page is displayed.

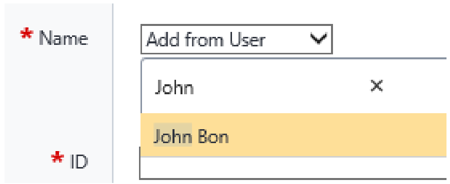
Add and Manage Resources

Resources consist of non-employees, such as contractors. On the Resources tab, you can either add existing users or create new resources.

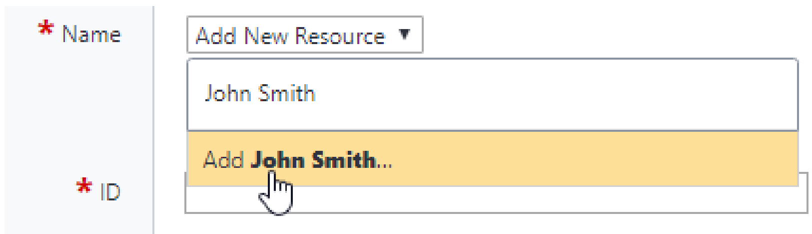
To add a resource

1. Open the **Manage Resources** page.
2. On the **Resources** tab, click **Add**.
3. From the **Type** list, select the type of resource.
4. To add an existing resource:
    a. From the **Name** list, select **Add from User**.
    b. Type the first few letters of the resource's name in the search field.
       The resources that match the search criteria are displayed.

c. Click on the resource to add.



5. To add a new resource:
    a. From the **Name** list, select **Add New Resource**.
    b. Type the name of the new resource and press **Enter**.



    c. Enter the new resource's title, email and phone number.
6. In the **Rates** section, enter the resource's rates:
    a. Enter the resource's default rate in the first row under the Pay Rates column. This is the initial rate when first hired.
    b. Select **Apply Burden** to add a burden rate to the total resource rate.
    c. To enter a pay raise, enter or select the effective date and then enter the new pay rate.
7. In the **Availability** section, enter the resource's monthly capacity:
    a. Enter the number of work days
    b. Enter the number of hours worked per day. The Total Monthly Hours will be calculated automatically.
8. In the **Custom Fields** section, assign the resource to each category.
9. Click **Add**.

To delete a resource

1. Open the **Manage Resources** page.
2. On the **Resources** tab, click **Delete** next to the resource you wish to delete.
3. When prompted, click **Confirm**.

To deactivate a resource

Resources that are not active cannot be assigned to a project.

1. Open the **Manage Resources** page.
2. On the **Resources** tab, clear the **Active** check box next to the resource you wish to deactivate.

3. Click **Save**.

Set the Labor Burden Rate

Use the Default Burden table to set each year's labor burden rate.

To add a burden rate

1. Open the **Manage Resources** page.
2. On the **Burden** tab, click **Add**.
3. Enter the burden rate as a factor inclusive of Pay Rate or as a percentage added to the Pay Rate.
4. Toggle to show the burden rate as either a factor or as a percentage.
5. Select the date when the burden rate is effective.
6. Click **Add**.

To edit a burden rate

1. Open the **Manage Resources** page.
2. On the **Burden** tab, click on the labor burden rate you wish to edit.
3. On the **Edit Labor Burden** dialog box, edit the rate details.
4. Click **Save**.

To delete a burden rate

1. Open the **Manage Resources** page.
2. On the **Burden** tab, click on the labor burden rate you wish to delete.
3. On the **Edit Labor Burden** dialog box, click **Delete**.

Specify Resource Roles

Specify the roles that can be assigned to a resource for a project. Only active roles can be assigned.

> **Note:** The resource role field is unrelated to an e-Builder user's role. This resource role is intended to support organizations that have been tracking resource roles in another platform and want to have those same roles available in e-Builder.

To add a role

1. Open the **Manage Resources** page.
2. On the **Roles** tab, click **Add**.
3. Enter the name of the role.
4. Click **Add**. Click **Close** to exit the **Add Role** dialog box.

To delete a role

1. Open the **Manage Resources** page.
2. On the **Roles** tab, click **Delete** next to the role you wish to delete.
3. When prompted, click **Confirm**.

Calendar Exceptions

Calendar exceptions are days that will be treated as an exception to the general rule, such as holidays that fall on typical working days. From the Calendar Exceptions page, you can choose particular dates and mark them as working or non-working days. Identifying these days at the onset of a project helps the schedule manager plan more effectively.

Calendar exceptions at the account level will affect every project in the account. The dates are visible on the Project Details Settings tab and cannot be removed from the project level. For accounts using Resource Management or with Multiple Calendars feature activated, the account level Calendar Exceptions roll to the Project Details page, but do not affect the Schedule module. Accounts using these features must set calendar exceptions independently within each individual calendar.

> **Tip:** To update calendar exceptions in bulk without account level exceptions, create a special Schedule template without any tasks. Set up calendars within Manage Calendars including calendar exceptions. Whenever new holidays are added as exceptions, the project teams can re-apply the template. Calendars with the same names as those in the template will be updated with new exception.

> **Note:** Only a user with update project details permissions has the ability to modify the calendar exceptions.

In the Schedule module, the schedule manager has the opportunity to specify the days of the week that will be included in a typical work week.

To add calendar exceptions

1. Open Schedule settings.
2. Click **Calendar Exceptions**. The Calendar Exceptions page is displayed.
3. In the **Date** field, enter or select the date that will be saved as a working or non-working day in the list of calendar exceptions.
4. Click the adjacent drop-down arrow and select **Non-working** or **Working** to make the selected date a working or non-working day.
5. Click **Add**.

To delete calendar exceptions

1. Open Schedule settings.
2. Click **Calendar Exceptions**. The Calendar Exceptions page is displayed.
3. Select the check box next to the date(s) you want to remove.
4. Click **Delete.**

Schedule Custom Fields

Custom fields are fields that you define for users of the Schedule module to complete. They are used mainly for reporting on project schedules. They help you gather additional information that may not be covered in the schedule or schedule details.

Although you can add schedule custom fields in the Schedule Settings, it is recommended that custom fields are added through Global Custom Fields, which will allow you to add custom fields to any Trimble Unity Construct module or object.

For more information on custom fields, see About Global Custom Fields.

The following actions can be taken from the custom fields pages in the Setup module:

- Add Schedule Custom Fields
- Add Task Custom Fields
- Add Custom Field Dependencies

Add Schedule Custom Fields

Custom fields allow you to gather additional information that may not be covered in the schedule or schedule details for reporting purposes. Although you can add schedule custom fields in the Schedule Settings, it is recommended that custom fields are added through Global Custom Fields, which will allow you to add custom fields to any Trimble Unity Construct module or object.

For more information on custom fields, see About Global Custom Fields and Add/ Edit Custom Fields.

To add schedule custom fields

1. Open Schedule settings.
2. Expand **Custom Fields** and click **Schedule**. The Schedule Custom Fields page is displayed.

   Tip: To add schedule custom field dependencies, click **Field Dependencies** on the Schedule Custom Fields page.
3. Click **Add Field**. The Add Custom Field page is displayed.
4. In the **Select Data Type** section, select the radio button beside the data type, and then click **Next**.
5. On the **Custom Field Details** section, enter a name for the custom field in the **Field Label** field.
6. Add any of the following optional details:
   - **Description**: Enter a description of the custom field.
   - **Required**: Select this check box to make this a required field. Leave clear to make this an optional field.
   - **Default Value**: Enter a default value for the field.
   - **Permission**:
     - **Admin Edit Only**: Select to make this field editable by account administrators only.
     - **All Users**: Select View to make this custom field visible to all users. Select the Edit check box to allow all users to modify the custom field by entering and editing data.
     - **Role Name**: If the custom field can be edited by a role, the role will automatically inherit view permissions as well. You can allow all roles to view or edit the custom field by selecting either check box in the 'Role Name' header. However, to specify the roles that are able to view or edit, select the respective check boxes next to the role name.
7. Click **Next**.
8. Review the details of the custom field under the **Field Summary** and **Preview** areas.
9. If changes are required, click **Previous** to navigate to the appropriate page and make changes.

   —Or—

If details are correct, click **Save**. The new custom field is added to the Schedule Custom fields page.

> **Tip:** Click **Reorder** to change the order that the custom fields display. The Reorder Custom Fields page is displayed. Use the directional arrow buttons to reorder the saved custom fields.

Add Task Custom Fields

To add task custom fields

1. Open Schedule settings.
2. Expand **Custom Fields** and click **Task**. The Task Custom Fields page is displayed.
3. Click **Add Field**. The Add Custom Field page is displayed.

   > **Tip:** To add schedule custom field dependencies, click **Field Dependencies** on the Schedule Template Custom Fields page.

4. In the **Select Data Type** section, select the radio button beside the data type, and then click **Next**.
5. On the **Custom Field Details** section, enter a name for the custom field in the **Field Label** field.
6. Add any of the following optional details:
   - **Description**: Enter a description of the custom field.
   - **Required**: Select this check box to make this a required field. Leave clear to make this an optional field.
   - **Default Value**: Enter a default value for the field.
   - **Permission**:
     - **Admin Edit Only**: Select to make this field editable by account administrators only.
     - **All Users**: Select View to make this custom field visible to all users. Select the Edit check box to allow all users to modify the custom field by entering and editing data.
     - **Role Name**: If the custom field can be edited by a role, the role will automatically inherit view permissions as well. You can allow all roles to view or edit the custom field by selecting either check box in the 'Role Name' header. However, to specify the roles that are able to view or edit, select the respective check boxes next to the role name.
7. Click **Next**.
8. Review the details of the custom field under the **Field Summary** and **Preview** areas.
9. If changes are required, click **Previous** to navigate to the appropriate page and make changes.

   —Or—

   If details are correct, click **Save**.

   > **Tip:** Click **Reorder** to change the order that the custom fields display. The Reorder Schedule Template Custom Fields page is displayed. Use the directional arrow buttons to reorder the saved custom fields.

Schedule Options

The Schedule Options allow you to do two things: determine whether or not a schedule manager is able to re-save the baseline after it has been set; and decide whether or not to link the project start and target date with the schedule. However, in the Project Details, if a start and target date are entered, these dates will be used as the schedule's start and target dates. If this is the case, users will not be able to modify these dates in the schedule.

To edit the schedule options

1. Open Schedule settings.
2. Click **Options**. The Schedule Options page is displayed with the following options:
   a. **Restrict Schedule Manager from Re-saving Baseline**: Select this check box to restrict the schedule manager from re-saving the baseline once the initial baseline has been set.
   b. **Link Project Start and Target Date with Schedule**Select this check box to link the project start date and the target date with the schedule. Doing so will ensure that the project's life cycle coincides with the project schedule. But please keep in mind that if the project and schedule are linked, then changing dates in the schedule will affect project dates. This is a good option only if you want the project details date to be consistent with the schedule dates.
   c. **Automatically calculate the % complete by default**: Select this check box to automatically calculate the percentage complete by default. This feature can also be managed per schedule through the schedule details page.
3. Click **Save**.
   —Or—
   Click **Cancel** to discard changes. Unsaved changes will be lost.

Schedule Templates

Schedule templates are a great time-saving tool. They provide a prototype for project schedules. If you have projects that are similar in nature such as elementary schools, high schools, and parking garages, each of these project types can have a template that will ensure, at the minimum, the core tasks are addressed. Templates also give the schedule manager a framework for building and completing the project schedule. With very little verbal communication, you and the schedule managers can be in sync with task schedule management.

> **Note:** Only users with Manage Templates permissions are able to save the template as an account setting.

Account templates are available in all projects, whether or not the schedule manager has access to those projects.

Personal templates can be created by you, or for you by an administrator or user with Manage Template permissions. These templates can be created from My Settings or directly from the Project Schedule. A schedule that includes the fundamental milestones and master tasks might be saved as an account template. Personal templates are tied to your username and will be available in any project that you have access to.

Constraints are not saved to templates. Non-managers may choose to add templates to track only the tasks that pertain to them. For example, someone in the Finance department might only be concerned with master tasks and would therefore make the duration of all subtasks "0" and apply this template to all of their new projects.

To access the Admin Schedule Template page

1. Click **Setup**.
2. From the Administration Tools menu, expand **Schedule**.
3. Click **Schedule Templates**.

   The Schedule Templates page is displayed.

To access My Schedule Templates page

1. Click **Setup**.
2. From the My Settings menu, expand **Schedule**.
3. Click **My Schedule Templates**.

   The My Schedule Templates page is displayed.

Add a schedule template

Administrators or users with manage schedule permission can add schedule templates

Tip: Ensure that you complete the required fields that are marked with an *.

To add a new schedule template

1. On the tasks toolbar, click **Add**.
2. Enter schedule template details:
   - **Name***: Enter a name for the schedule template. This field is required.
   - **Description**: Enter a brief description of the schedule template.
   - **Status**: To make this template available for use, select the **Active** option (this is the default selection). To leave it as a draft template, select the **Draft** option.
   - **Link Resource Cost to the Budget**: This option is only available if you have the Resource Management with Cost module enabled.
     - **None**: Default setting - This setting is disabled.
     - **Tasks to Budget Line Item**: Allows Schedule Manager to select a single Budget Line Item for Resource Costs on a Task. Choose this option for projects where all the resources who are assigned to a single task charge their time to the same budget line item or account code.
     - **Resources to Budget Line Item**: Allows the schedule manager to select a single budget line item per resource assigned to any task. Can result in multiple budget line items for resource costs on a task if resources are linked to different budget line items.

Choose this option for projects where different resources working on the same task can charge time to different budget line items or account codes.

   - **Duration**: The duration of the schedule. This field is not editable.
   - **Created By**: The name of the user who created the schedule template. This field is not editable.
   - **Date Created**: The date when the schedule template was created. This field is not editable.

3. Click **Save.**

Delete a schedule template

> **Warning:** Once a schedule template is deleted, it cannot be recovered. Deleted templates are immediately removed from the account and will no longer be available for use.

Tip

If you do not want this template to be available for use, but you also don't want to remove it from the account, change its status to "draft."

To delete a schedule

1. On the Schedule Templates page, click the **Delete** link located to the left of the template you want to delete. A confirm deletion message is displayed.
2. Click **Yes, Delete the Schedule Template** to delete the template.

- Related topics

Working with Schedule Templates

Tasks can be added to schedule templates through an import of a Microsoft Project .mpp file or manually, by adding one task at a time. In most cases, an import will be used, but manual entry might be necessary for adding additional tasks after the initial schedule has been uploaded. You can work on your personal schedule templates or on an account schedule template (Admin) that will be available to all projects.

To access the Admin Schedule Template page

1. Click **Setup**.
2. From the Administration Tools menu, expand **Schedule**.
3. Click **Schedule Templates**.

   The Schedule Templates page is displayed.

To access My Schedule Templates page

1. Click **Setup**.
2. From the My Settings menu, expand **Schedule**.
3. Click **My Schedule Templates**.

   The My Schedule Templates page is displayed.

To access the Schedule Template Details page

- On the Schedule Templates page, click **Edit** to the left of the template you wish to work with.

  The **Schedule Template Details** is displayed.

Tasks toolbar

On the Schedule Template Details page, the following operations can be performed using the Tasks toolbar:

- **Add Task**: This button is not visible to Task Resources. Only Schedule Managers and Task Managers are able to see this button. Click to add a single task.
- **Outdent**: Decreases the indentation level of the selected task in the tree. This button is only available to Schedule Managers or users with Manage Templates permission. For instructions, see Move Tasks within the Schedule.
- **Indent**: Increases the indentation level of the selected task in the tree. This button is only available to Schedule Managers or users with Manage Templates permission.
- **Undo**: Click to undo the last action. This button is only available to Schedule Managers or users with Manage Templates permission.
- **Redo:** Click to undo the last action. This button is only available to Schedule Managers or users with Manage Templates permission.
- **Import:** Click to import tasks using an .MPP file (Microsoft Project 2003, 2007, 2010, 2013). This button is only available to Schedule Managers or users with Manage Templates permission. For details or instructions, see Working with Schedule Imports.
- **Expand:** Shows all the tasks and subtasks.
- **Collapse:** Collapses the subtasks under their tasks.
- **Previous / Next:** Moves the time axis backward / forward in time in units specified by the current view.
- **Zoom In/Out/Fit:** Click to zoom in or out the timeline. Click Fit to change the timeframe of the scheduling chart to fit all the events in it.
- **Working Time:** Click to open the Manage Calendars dialog box. If your account has the Resource Management (RM) or Resource Management with Costs (RMC) option enabled, you have the ability to manage calendars.

Edit the details of a schedule template

1. On the Schedule Templates page, click the **Edit** link located to the left of the template you want to edit.
2. In the Schedule Template Details area, edit the following details as required:
   - **Name**: The name for the schedule template.
   - **Description**: The description of the schedule template.

- **Status**: The status of the schedule template.
- **Link Resource Cost to the Budget**:
  - **None**: Default setting - This setting is disabled.
  - **Tasks to Budget Line Item**: Allows Schedule Manager to select a single Budget Line Item for Resource Costs on a Task. Choose this option for projects where all the resources who are assigned to a single task charge their time to the same budget line item or account code.
  - **Resources to Budget Line Item**: Allows the schedule manager to select a single budget line item per resource assigned to any task. Can result in multiple budget line items for resource costs on a task if resources are linked to different budget line items. Choose this option for projects where different resources working on the same task can charge time to different budget line items or account codes.
- **Duration**: The duration of the schedule. This field is not editable.
- **Created By**: The name of the user who created the schedule template. This field is not editable.
- **Date Created**:The date when the schedule template was created. This field is not editable.

3. Click **Save**.

Add tasks manually to a schedule template

You can add tasks to the template one task at a time.

To add tasks manually

1. On the tasks toolbar, click **Add Task**.

   A new row is added to the bottom of the schedule template.
2. Add the task's details inline and complete all required fields from the following:
   - **Task Name**: Enter the name of the task in this field.
   - **Choose where to add the task**: Choose the order in which you want this task to occur:
     - Add as a last task in the schedule.
     - Add as a subtask of [choose predecessor task].
     - Insert above [choose task that will follow this one].
     - Insert below [choose task that will precede this one].
   - **Task Type**: Select whether this is a task or event.
   - **Duration**: Enter the amount of days, weeks, or months this task will take to complete.
   - **Master Task**: Select the Master Task.
   - **Description**: Enter a description to give the Schedule Manager more information about the task.
   - **Predecessors**: Enter the task number of the predecessor task. The predecessor task is a task that must be completed before another task can begin. For information, see About

Predecessor Tasks. The proper syntax for this field is the task number + start/ finish abbreviation.

- **Resource Role**: Select the name of the person that will be responsible for overseeing this task.
- **Manager Role**: Select the name of the schedule manager.
- **Approval Required for Date Changes**: Select this check box to require approval on changes made to the dates associated with this task.
- **Approval Required for Work Complete Changes**: Select this check box to require approval on changes made to work that has already been marked completed. The options that you can include and a description of each are listed below:
  - **No**: A manager's approval is not required when changes are made to the completion status of this task.
  - **All Changes**: A manager's approval is required when any change is made to the task's completion status.
  - **100% Only**: A manager's approval is only required when the task is set to 100% complete.
- **Set Task as a Milestone?**: Select this check box to set this task as a milestone in your schedule. Identifying milestones increase the value of Schedule reports.

3. Click **Save**.

Add tasks using an import file

The standard schedule template import files are .mpp files, which can be exported from Microsoft Project. Typically, import files will include the task name, duration, predecessors, and the start and finish dates; but for your convenience, e-Builder specific fields, can also be included. If the import file includes any of these columns by different names, you'll be able to map those columns to the corresponding e-Builder fields during the import process.

> **Note:** Adding tasks to the schedule template is the second and final step to create schedule templates. If you have not already done so, please add a schedule template before attempting to complete this process.

To import tasks

1. On the tasks toolbar, click **Import**. The Import Schedule page is displayed with a 3-step import wizard.
2. In the Import File field, click **Choose File** to browse for and select the import file.
3. Click **Next**. The Field Mapping page is displayed showing the mapping between the columns in the import file and the e-Builder fields.
4. If necessary, map the columns in the import file to the corresponding built-in e-Builder fields.
5. Click **Next**. The Review page is displayed showing a preview of the import and any exceptions determined.

> **Tip:** A count of the rows that imported successfully display on the **Preview** tab. The **Exceptions** tab lists the rows that failed to import and the reasons why. Click this tab to view failed items. To go back and make corrections to the import file, click **Previous** and on the Mappings page, click **Previous** again, and then repeat the steps.

6. Click **Import** to complete the import.
7. Click **Save**.

Move tasks within the schedule template

Once the tasks have been created, you can move them within the schedule template to rearrange them or create sub-tasks.

To move tasks within the schedule template

1. Select the task you wish to move.
2. Do any of the following actions:
    - Drag it up or down within the schedule to reposition it.
    - To make it a subtask, move it directly below the parent task, and then click the **Indent** in the **Tasks** section of the toolbar.
    - To move a subtask out of a parent task or to make it a summary task, click the **Outdent** in the **Tasks** section of the toolbar.

Manage Calendars

Use the Manage Calendars dialog box to edit or create a new calendar. You can also set the working days and hours, as well as set the exceptions (e.g., holidays).

To add new calendars

1. On the tasks toolbar, click **Working Time.** The Manage Calendars popup window displays with the standard calendar.
2. Click **Add**. The Add New Calendar popup is displayed.
3. In the **Name*** field, enter a name for the new calendar.
4. Choose one of the following options:
    - **Make a copy of the (calendar)**: Select this option and select a calendar from the drop-down list to make a copy of an existing calendar.
    - **Add a new calendar**: Select this option to add a new calendar.
5. Click **Add**. The new calendar is added.

    > **Note:** To make it the default calendar, select the **Default Calendar** check box.

    #### To edit the working time

    a. Select the calendar to edit it. Click **Edit Working Time**. The Edit Working Time popup window displays.

    b. From the **Working Week** field, select the working days for the calendar.

c. In the **Working Hours** field, click on the working hours to edit them or click **Add** to add new hours.
d. Click **OK**.
e. Click **Apply** to save your changes.

To add exceptions to your calendar, such as working or non-working days

a. Select the calendar to edit it. In the **Exceptions** section, click **Add**. A new row is added.
b. In the **Name** column, enter a descriptive name for the exception.

> **Note:** Two exceptions cannot be added for the same day.

c. In the **Type** column, select whether it is a working or non-working type of exception.
d. In the **Start Date** field, enter or select the start date of the exception.
e. In the **Finish Date** field, enter or select the finish date of the exception.
f. Click **Apply** to save your changes.

Copy schedule templates

1. Apply the template to a blank project.
2. Go to the blank project and create a new template based on the existing project.
3. Edit the newly created template.