

## Job Aid: e-Builder Schedule Module for Project Managers

### Purpose

The purpose of this job aid is to provide guidance on how to use the Schedule Module in e-Builder to track pre-determined project milestones.

### Why is the Schedule Module in e-Builder useful to me as a PM?

- Eliminates hand-kept milestone tracking spreadsheets
- Enables project schedule health reporting on projects and across the portfolio
- Refocuses reporting to meet client's desire for on time project delivery
- Enables client self-service to see current status of projects and projected milestone dates

### Overview

The Schedule Module will be used to set the initial project delivery expectations with the Client and to report-out at the end of each completed milestone. Milestones and overall project delivery will be categorized as on-time, at-risk or late. Project Managers will still be responsible for creating and maintaining detailed project schedules in Microsoft Project.

**All project managers are required to input the key dates in the Schedule Module.**

### Getting Started

The Schedule Module is accessible at the project level through the use of the Project Menu tabs on the left of the screen within a project.

The following table contains start and end dates for each project phase. Use these dates when entering information into the eBuilder Schedule module.

Phase	Start date	Finish date
Scope & Fund	Project/Program Initiation Date	Funds secured (Plant Fund Established or Capital Fund Established)
A/E (& CM) Selection Phase	Requisition Created	A/E PO Issued
Design Phase	A/E PO Issued	100% CDs Approved
Construction Bidding Phase	Requisition Created (or CM NTP on bidding)	PO Issued (or GMP Contract Amendment Issued)
Construction Phase	PO Issued (or GMP Contract Amendment Issued)	Substantial Completion
Closeout Phase	Substantial Completion	Final Payment Made / PO Closeout

## Schedule Color Task Definitions

**Inactive Schedule** (Color: Gray) – This means the schedule template has been applied to your project but not activated or baselined.

1	Scope & Fund
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**Activated Schedule** (Color: Orange) – This means that the schedule has been Activated but not baselined.

1	Scope & Fund
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**Baselined** (Color: Green) – This means that the schedule has been baselined

1	Scope & Fund
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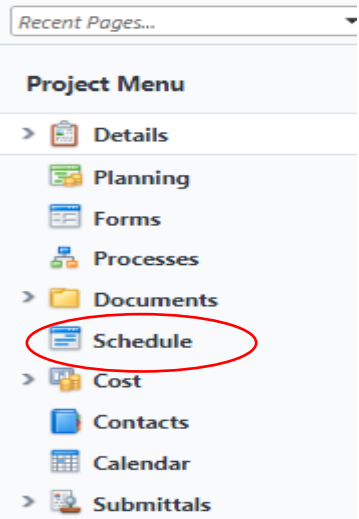
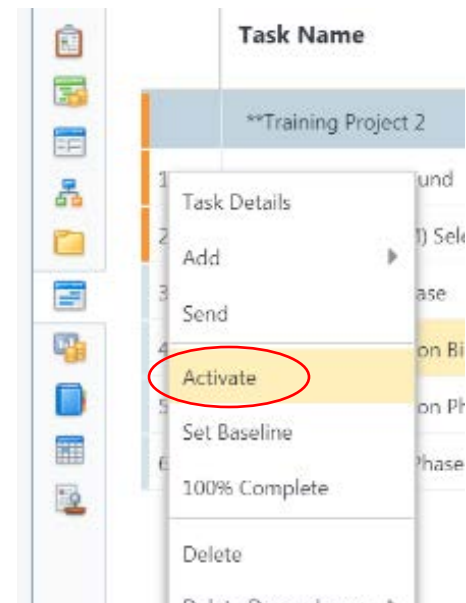
**Behind Schedule** (Color: Red) – This means that the finish date for the selected task is past the baselined finish date. This task is considered late.

1	Scope & Fund
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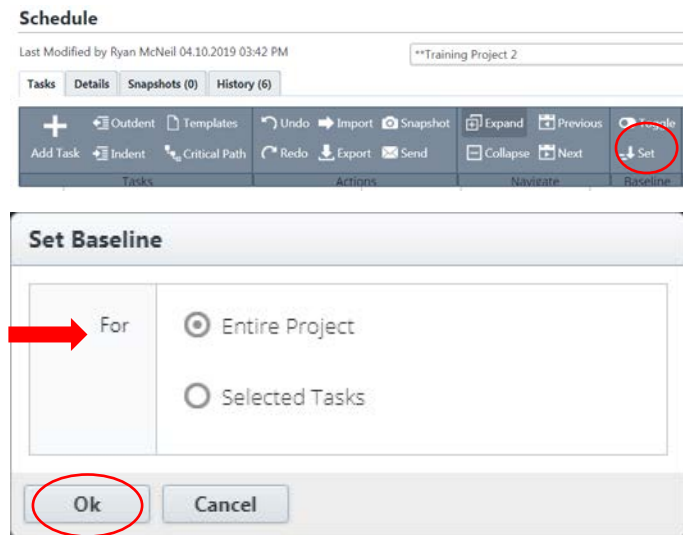
**100% Complete** (Color: Blue) – This means that the selected task is 100% complete.

1	Scope & Fund
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## Job Aid: e-Builder Schedule Module for Project Managers

Steps	Visual																																
<ol style="list-style-type: none"> <li>1. Navigate to your project in eBuilder.</li> <li>2. Click on <b>Schedule</b> to navigate to the Task landing page. Every project will have the UMB schedule template applied with six standard milestone tasks.</li> </ol>	 <p>The screenshot shows a 'Project Menu' with several options: Details, Planning, Forms, Processes, Documents, <b>Schedule</b> (circled in red), Cost, Contacts, Calendar, and Submittals.</p>																																
<ol style="list-style-type: none"> <li>3. <b>Activate</b> each Task by right clicking and selecting Activate.</li> </ol>	 <p>The screenshot shows a context menu for a task named '**Training Project 2'. The menu items are: Task Details, Add, Send, <b>Activate</b> (circled in red), Set Baseline, 100% Complete, and Delete.</p>																																
<ol style="list-style-type: none"> <li>4. <b>Enter the Start date for Scope &amp; Fund</b></li> <li>5. <b>Enter durations for all tasks.</b> The Schedule will automatically factor Finish dates for each task. <b>Note:</b> Durations must be entered as business days.</li> </ol>	<table border="1"> <thead> <tr> <th>Name</th> <th>Duration</th> <th>Start</th> <th>Finish</th> </tr> </thead> <tbody> <tr> <td>100 Test</td> <td>22.95 months</td> <td>11.05.2018</td> <td>08.06.2020</td> </tr> <tr> <td>Scope &amp; Fund</td> <td>25 days</td> <td>11.05.2018</td> <td>12.07.2018</td> </tr> <tr> <td>A/E (&amp; CM) Selection Phase</td> <td>1 day</td> <td>12.10.2018</td> <td>12.10.2018</td> </tr> <tr> <td>Design Phase</td> <td>58 days</td> <td>12.11.2018</td> <td>02.28.2019</td> </tr> <tr> <td>Construction Bidding Phase</td> <td>90 days</td> <td>03.01.2019</td> <td>07.04.2019</td> </tr> <tr> <td>Construction Phase</td> <td>270 days</td> <td>07.05.2019</td> <td>07.16.2020</td> </tr> <tr> <td>Closeout Phase</td> <td>15 days</td> <td>07.17.2020</td> <td>08.06.2020</td> </tr> </tbody> </table> <p>The 'Scope &amp; Fund' row in the table is circled in red.</p>	Name	Duration	Start	Finish	100 Test	22.95 months	11.05.2018	08.06.2020	Scope & Fund	25 days	11.05.2018	12.07.2018	A/E (& CM) Selection Phase	1 day	12.10.2018	12.10.2018	Design Phase	58 days	12.11.2018	02.28.2019	Construction Bidding Phase	90 days	03.01.2019	07.04.2019	Construction Phase	270 days	07.05.2019	07.16.2020	Closeout Phase	15 days	07.17.2020	08.06.2020
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6. **Baseline the current schedule** by clicking **Set** in the Schedule menu. Select **Entire Project** and click **OK**.



**Schedule**  
Last Modified by Ryan McNeil 04.10.2019 03:42 PM    \*\*Training Project 2

Tasks   Details   Snapshots (0)   History (6)

+   Outdent   Templates   Undo   Import   Snapshot   Expand   Previous   Baseline  
Add Task   Indent   Critical Path   Redo   Export   Send   Collapse   Next   Set

**Set Baseline**

For    Entire Project  
 Selected Tasks

**Ok**   Cancel

7. **Save the Schedule** by clicking the **save** button in the top right hand corner of the screen.



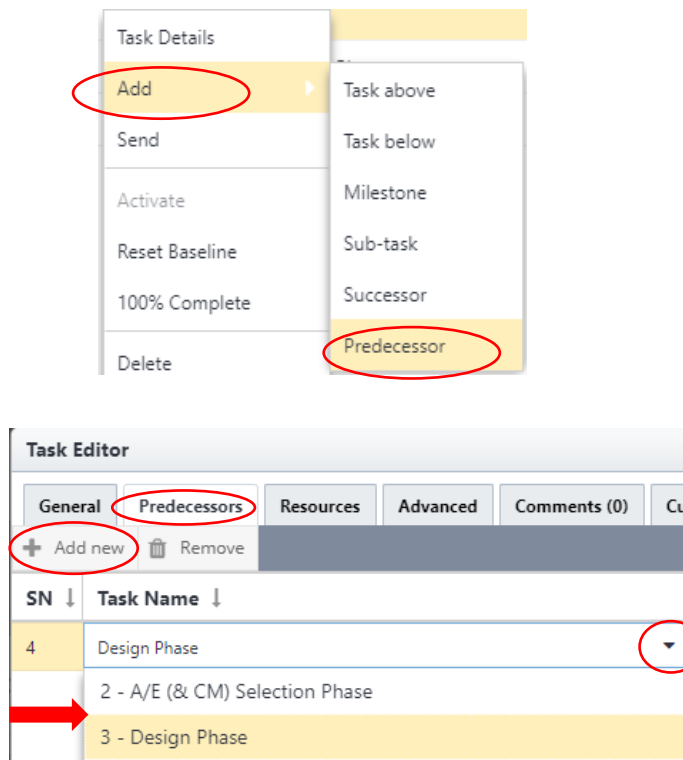
**Save**

\*\*Training Project 2

1. To **add a Predecessor** task to track other important tasks in the schedule (NOTE: Manually added tasks will not be calculated in reports)

- Right click** on a task where you want to insert the predecessor.
- Hover** the mouse over the **Add** button to see the list of items.
- Select predecessor.**
- Double click** on the newly added task.
- Type** in a name for the task.
- Click on the **Predecessor tab** at the top.
- Click the **Add New** button.
- From the drop down list **select** the task that will be this new tasks predecessor.

2. Click **Ok**.



Task Details

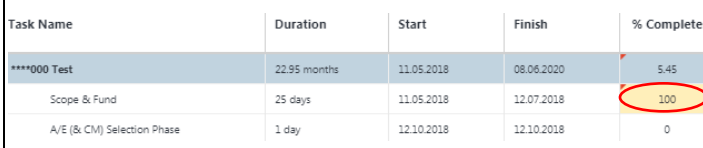

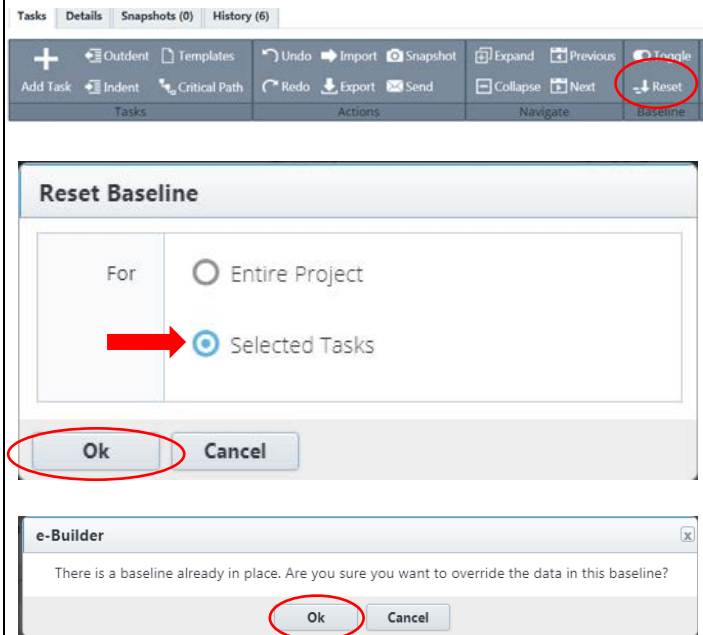
**Add**   Task above  
Send   Task below  
Activate   Milestone  
Reset Baseline   Sub-task  
100% Complete   Successor  
Delete   **Predecessor**

**Task Editor**

General   **Predecessors**   Resources   Advanced   Comments (0)   Cu

**+ Add new**   Remove

SN ↓	Task Name ↓
4	Design Phase
	2 - A/E (& CM) Selection Phase
	3 - Design Phase

<p>3. At the end of each completed milestone, <b>enter actual dates.</b></p> <p>a. <b>Set % Complete to 100%.</b></p>	 <table border="1"> <thead> <tr> <th>Task Name</th> <th>Duration</th> <th>Start</th> <th>Finish</th> <th>% Complete</th> </tr> </thead> <tbody> <tr> <td>****000 Test</td> <td>22.95 months</td> <td>11.05.2018</td> <td>08.06.2020</td> <td>5.45</td> </tr> <tr> <td>Scope &amp; Fund</td> <td>25 days</td> <td>11.05.2018</td> <td>12.07.2018</td> <td>100</td> </tr> <tr> <td>A/E (&amp; CM) Selection Phase</td> <td>1 day</td> <td>12.10.2018</td> <td>12.10.2018</td> <td>0</td> </tr> </tbody> </table>	Task Name	Duration	Start	Finish	% Complete	****000 Test	22.95 months	11.05.2018	08.06.2020	5.45	Scope & Fund	25 days	11.05.2018	12.07.2018	100	A/E (& CM) Selection Phase	1 day	12.10.2018	12.10.2018	0
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<p>4. <b>Save</b> the updated Schedule by clicking the save button in the top right hand corner of the screen.</p>																					
<p>5. <b>Reset the project baseline</b> at key moments in the project lifecycle</p> <p>a. AE (&amp;CM) Selection Phase</p> <p>b. Construction Bidding Phase</p> <p>a. Click <b>Reset Baseline</b> and select For Selected Tasks.</p> <p>b. Click OK to override the existing baseline dates.</p>																					
<p>6. <b>Export as a pdf</b> to save a screen shot of the schedule.</p> <p>a. Click the <b>Export</b> button in the Actions section on the tool bar above the schedule.</p> <p>b. Select the <b>PDF</b> option from the drop down list.</p> <p>c. Click the <b>Print</b> button from the pop up Print Settings screen.</p> <p>d. Save the pdf version of the schedule</p>	