Overview

This Job Aid defines the steps to follow to develop the project schedule in IQ Scheduler.

There are four (4) core actions required to develop the project schedule.

1. Identify the work
2. Establish dependencies
3. Assign resources
4. Estimate the work

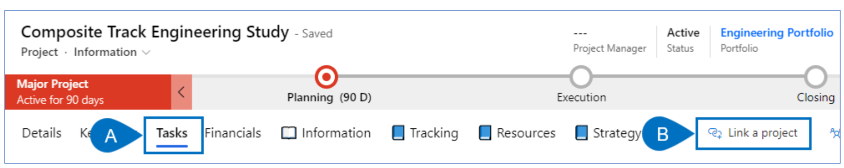
Identify the work using the Timeline view

Project Manager **IQ Scheduler**

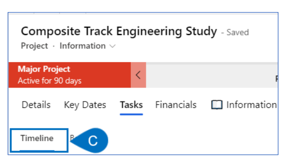
1. CAPTURE PROJECT DELIVERABLES

a. Open the project in Sensei IQ and select the **Tasks tab**.

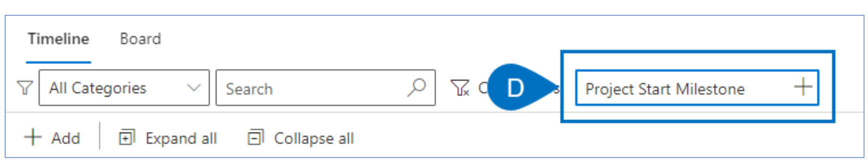
b. Ensure that the project is using **IQ Scheduler** rather than an external schedule tool by ensuring that the text "**Link to a project**" is visible, as opposed to an external tool icon.



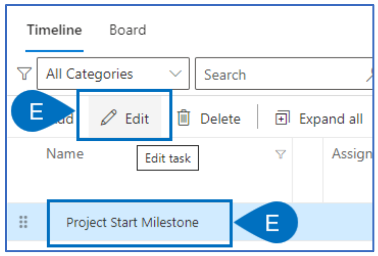
c. Click **Timeline** from the sub-ribbon.



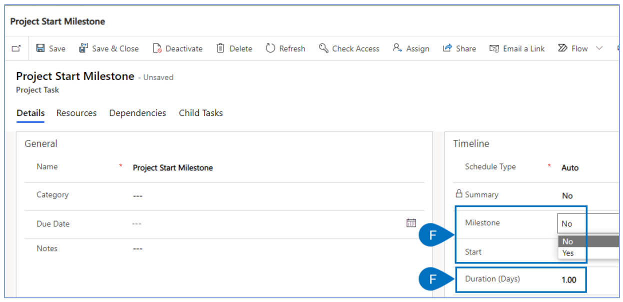
d. Create **a project start milestone** as the first line in the new schedule. Type "**Project Start Milestone**" into the **Add Task box and hit enter**.



e. **Select the task** just created and **click Edit** from the sub-ribbon.

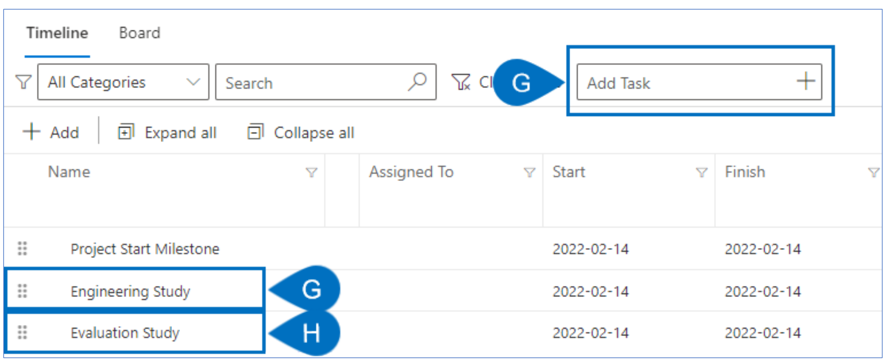


f. Set the **Milestone flag to Yes** or set the **Duration to zero** to make it a Milestone.

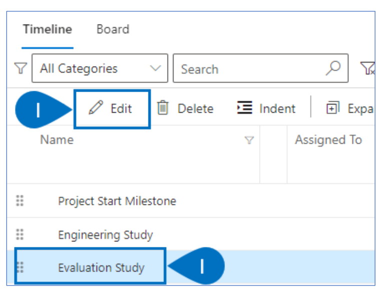


g. **Define the first phase of the project** by typing the phase name in the **'Add task'** area.

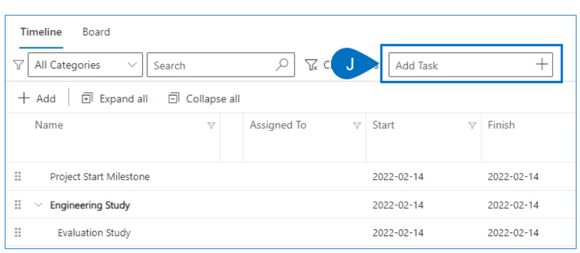
h. Continue to add the first **deliverables** in the same way.



i. Select the **Deliverable** and click **Indent** from the sub-ribbon.



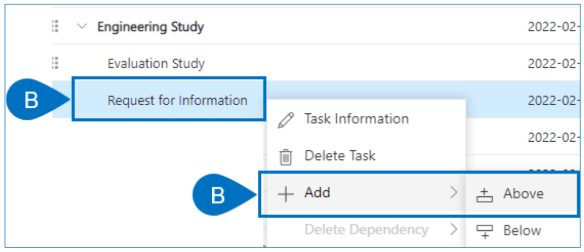
j. Continue to add **Milestones, Phases and Deliverables** in the same way.



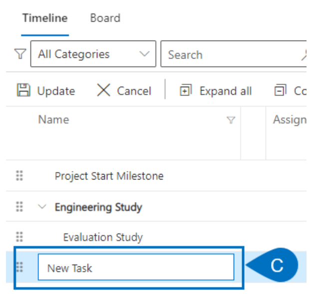
2. CAPTURE PROJECT SUB-DELIVERABLES

a. With the Phases, Deliverables and Milestones identified, the high-level Work Breakdown Structure (WBS) is complete. Now we need to decompose the WBS into sub-deliverables (if needed) and tasks (to be discussed in the next section).

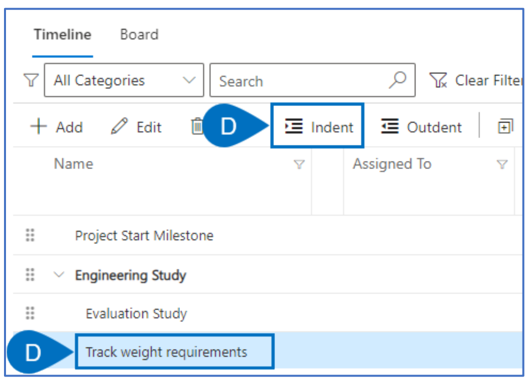
b. **Insert a new line** between the first two deliverables by **right mouse clicking** on the second deliverable and select **Insert Above**.



c. **Type the name** of the sub-deliverable.



d. **Select the new sub-deliverable** and then **click Indent** from the sub-ribbon.

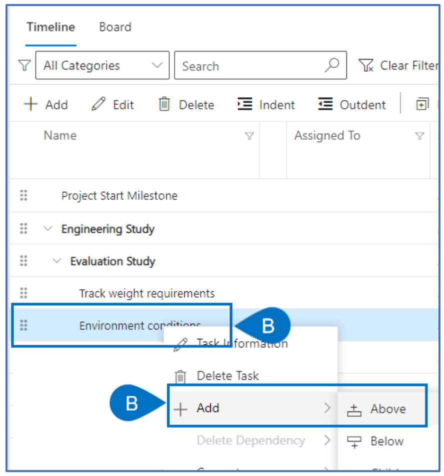


e. Continue to decompose the WBS as required.

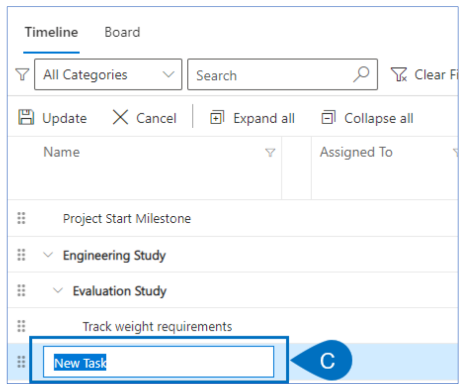
3. CAPTURE PROJECT TASKS

a. The final level of decomposition is to decompose the sub-deliverables into **detailed tasks**.

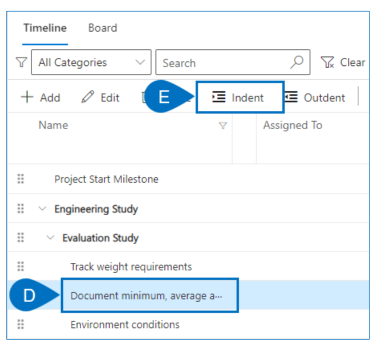
b. **Insert a new line** between the first two sub-deliverables by **right mouse clicking** on the second deliverable and select **Insert Above**.



c. **Type the name** of the task.



d. **Select the new task**
e. **Click Indent** from the sub-ribbon.



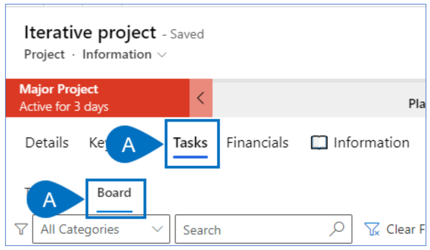
f. Continue to decompose the WBS as required.

Identify the work using the Board view

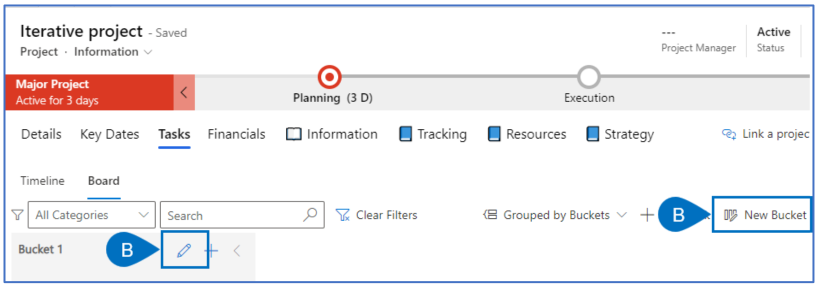
Project Manager IQ Scheduler

1. CONFIGURE THE BOARD

a. Open the project in **Sensei IQ** and select the **Tasks tab** and ensure you are on the **Board view**.



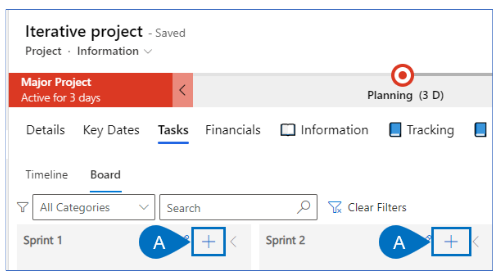
b. Configure the board by creating **buckets** (columns, Kanban processes) as appropriate for the project delivery approach by clicking the **Pencil icon** to edit an existing bucket or clicking **New Bucket** and giving the new bucket an appropriate name.



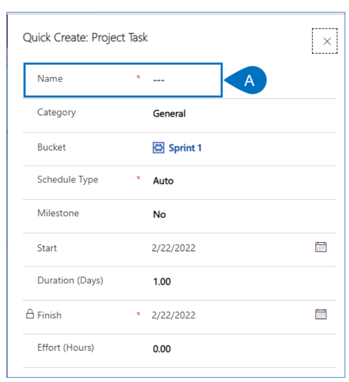
c. Continue to **add buckets** until the board is fully defined.

2. CAPTURE STOIES

a. **Capture the first story** for the project by clicking the **+ sign** from the appropriate column.



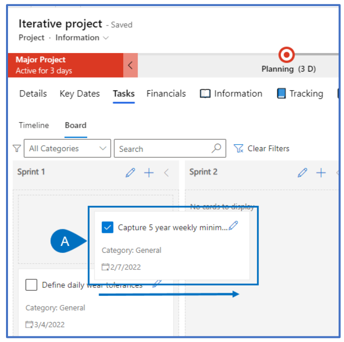
b. **Define the story details**.



c. Continue to add stories to the project in the same way.

3. ORGANIZE THE BOARD

a. Ensure the stories are in the correct column/bucket by **dragging and dropping** them into the appropriate location.



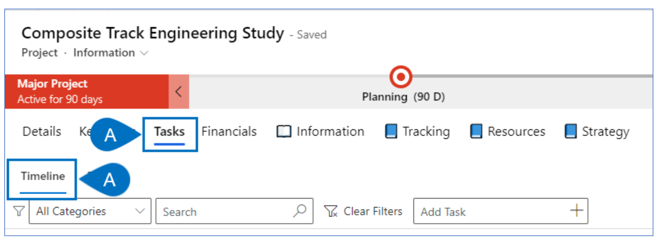
Establish dependencies

Project Manager

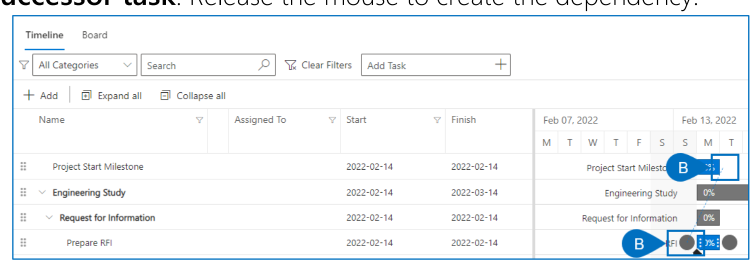
Project for the web

1. CREATNG DEPENDENCIES IN THE TIMELINE VIEW

a. Ensure you have the appropriate project open in **Sensei IQ** with the **Task tab** selected and the **Timeline view** active**.**

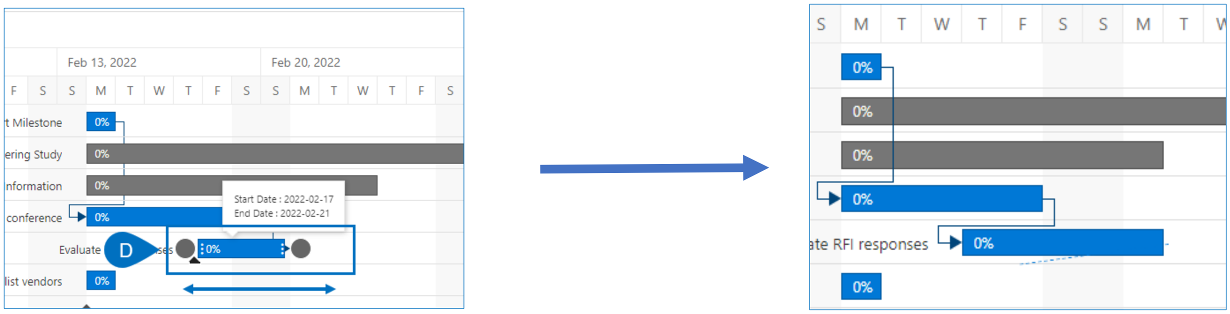


b. **Hover your mouse** over the **end of the Gantt bar for the successor**, and then click and drag to the **beginning of the successor task**. Release the mouse to create the dependency.

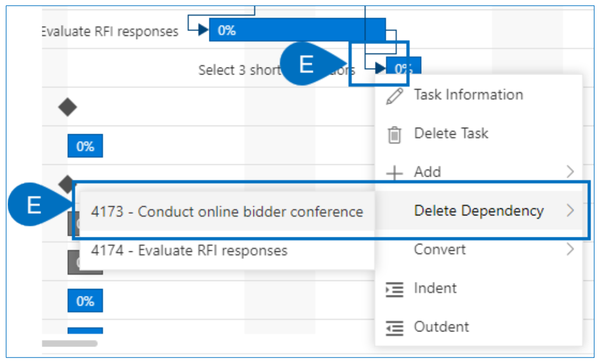


c. Create additional dependencies in the same way.

d. **Gaps and Overlaps** can be created by dragging the **Blue Gantt bar**.



e. Dependencies can be **deleted by right mouse clicking** on the end of the dependency arrow and selecting **Delete Dependency** and selecting the appropriate one to delete.

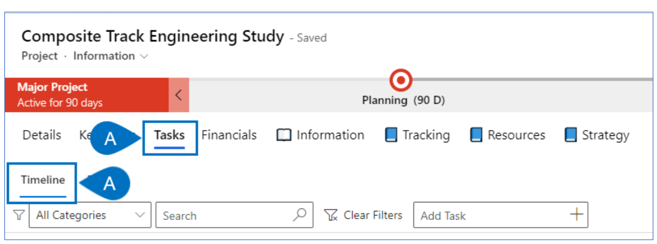


Assign Resources

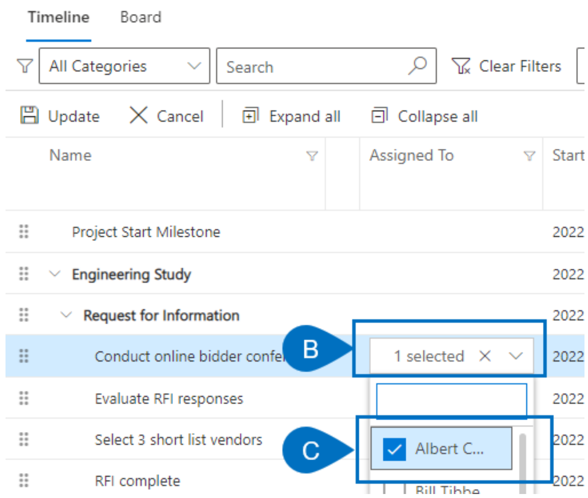
Project Manager **IQ Scheduler**

1. ASSIGN RESOURCES

a. Ensure you have the appropriate project open in **Sensei IQ** with the **Task tab** selected and the **Timeline view** active**.**

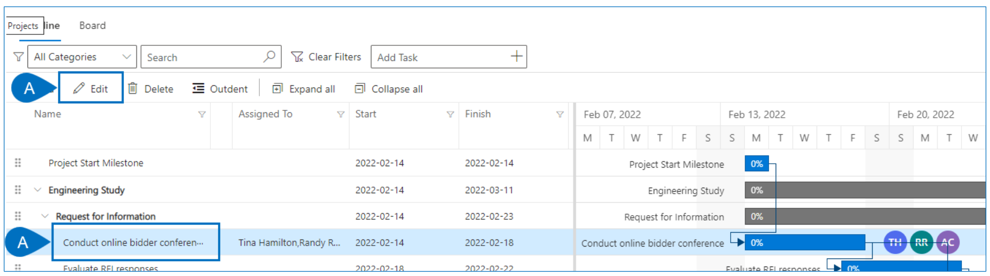


b. Double click in the Assigned to cell for the task you wish to add resources
c. Select the Down-arrow and select the resource(s) to be assigned to the task.



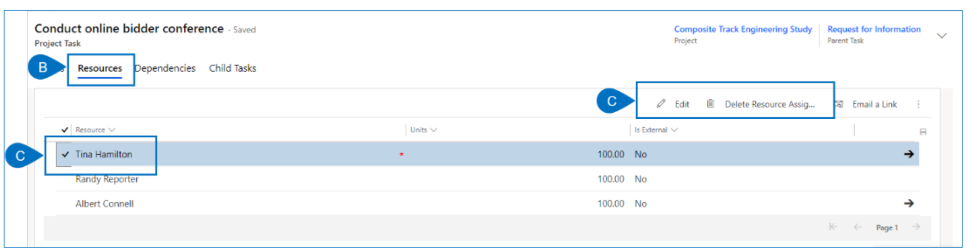
2. VIEWING AND ADJUSTING RESOURCE ASSIGNMENTS

a. **Select the task** you wish to view resource assignment details on and **click edit** from the sub-ribbon.

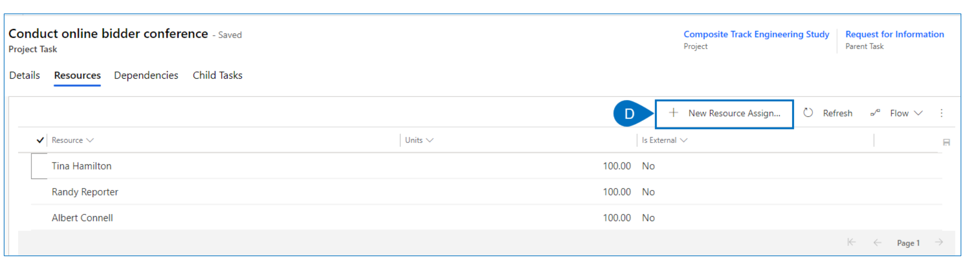


b. Click on the **Resources Tab.**

c. **View and update (or delete)** details related to the resource assignments.



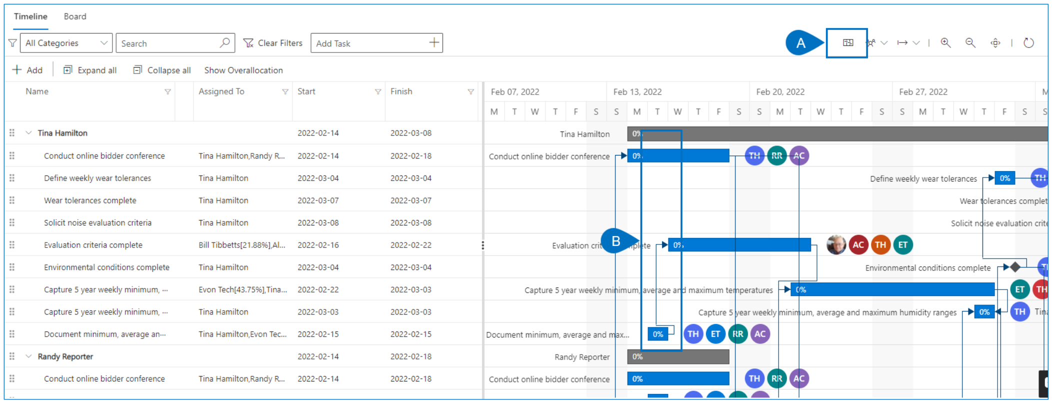
d. Additional resources can be added to the task by selecting **+ New Resource Assignment**.



3. VALIDATING RESOURCE ASSIGNMENTS

a. The **Resource View** allows you to view the project assignments from a **Resource centric view**.

b. This will allow you to **confirm availability of your resources** to complete assigned tasks, specifically when a resource is working on **multiple tasks in parallel**.

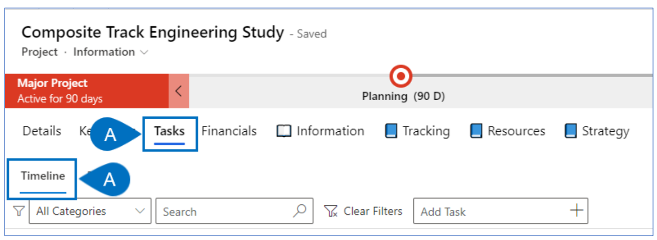


Estimate the work

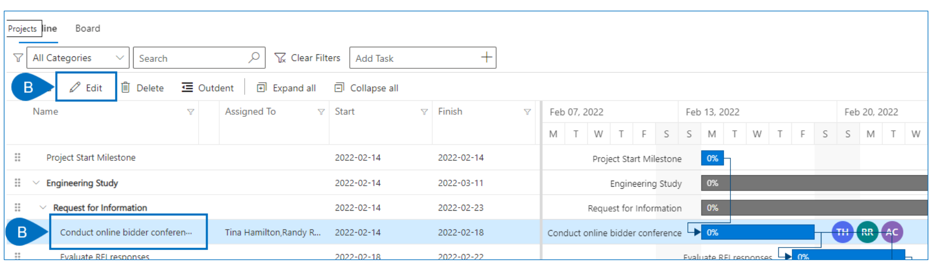
Project Manager **IQ Scheduler**

1. ESTIMATING THE WORK

a. Ensure you have the appropriate project open in **Sensei IQ** with the **Task tab** selected and the **Timeline view** active**.**

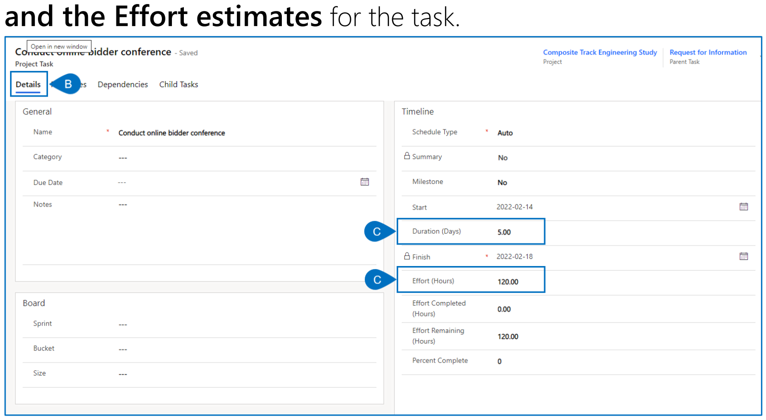


b. **Select the task** you wish to view resource assignment details on and **click edit** from the sub-ribbon.



c. Ensure you are on the **Details tab**.

d. Enter both the **Duration and the Effort estimates** for the task.



e. If required, from the **Resources tab** adjust the **distribution of the work between the resources** assigned to the task.