

#### 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** 

<sup>3</sup> 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.

Composite Track E Project · Information ~	ngin	eering Stu	dy - Saved			 Project Manager	Active Status	Engineering Portfolio Portfolio
Major Project Active for 90 days	<		Planning (90 D)		E	xecution		Closing
Details K	<b>F</b> asks	Financials	Information	Tracking	Resources	Strategy	В	থ্য Link a project 🎋

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

Compo Project	osite Track	Engin	eering Stu	dy - Saved
Major Proj Active for 9	<b>ject</b> 10 days	<		
Details	Key Dates	Tasks	Financials	Information
Timeline				

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.

Timeline Board	
√ All Categories  ✓ Search	Project Start Milestone +
+ Add	

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

### Job Aid | Creating the project schedule in IQ Scheduler



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

Project Start Milestone			
다 🖬 Save 🖨 Save & Cl	ose 🚺 Deactivate 📋 Delete 🖒 Refresh	💫 Check Access 🛛 🗛 Assign I	🖻 Share 🛯 Email a Link 🛛 Flow 🗸 🕯
Project Start Mileston Project Task Details Resources Deput	e - Unsaved endencies Child Tasks		
General			Timeline
Name *	Project Start Milestone		Schedule Type * Auto
Category			A Summary No
Due Date			Milestone No
Notes			Start Yes
		F	Duration (Days) 1.00

- Define the first phase of the project by typing the phase name in the 'Add task' area. g.
- h. Continue to add the first **deliverables** in the same way.

Timeline     Board       V     All Categories     V       + Add     Image: Expand all     Image: Collapse	₽ ₽ CI G	Add Task	+
Name 🗸	Assigned To $\qquad \bigtriangledown$	Start 🛛 🖓	Finish 🛛
II Project Start Milestone		2022-02-14	2022-02-14
II Engineering Study		2022-02-14	2022-02-14
Evaluation Study		2022-02-14	2022-02-14

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

Timeline Board	Search	
	Search	UX
🖉 🖉 Edit 📋	Delete 📃	Indent 🛛 🕀 Expa
Name	Y	Assigned To
II Project Start Milestone		
Engineering Study		
Evaluation Study		

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

Timeline     Board       V     All Categories     V			Add Task	+
+ Add 🗈 Expand all 🖃 Collap	se all			
Name 🛛 🖓	Ass	igned To ⊽	Start 🛛 🖓	Finish
II Project Start Milestone			2022-02-14	2022-02-14
II 🗸 Engineering Study			2022-02-14	2022-02-14
Evaluation Study			2022-02-14	2022-02-14

#### 2. CAPTURE PROJECT SUB-DELIVERABLES

Job Aid

- 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.

	Engineering Study				2022-02
:	Evaluation Study				2022-02
B	Request for Information	ß	Tack Information		2022-02
		Delete Task		2022-02	
	В	+	Add	>	📥 Above
			Delete Dependency	>	🖵 Below

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

Timeline Board	arch	;
🖺 Update 🗙 Cancel 🗍	Expand all	E Co
Name	$\nabla$	Assign
Project Start Milestone		
III V Engineering Study		
Evaluation Study		
New Task		C

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

Timeline Board					
√ All Categories  √	Search		Q	🔓 Cle	ar Filte
+ Add 🖉 Edit 📋	D	🖭 Inder	nt 🖭 O	utdent	Ð
Name		Y	Assigned	То	Y
Project Start Milestone	e				
III \vee Engineering Study					
Evaluation Study					
Track weight require	ments				

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**.

10

### Job Aid | Creating the project schedule in IQ Scheduler



Type the name of the task. C.

Timeline Board		
√ All Categories  ✓ Sea	ırch	🔎 🦙 Clear F
🖺 Update 🛛 🗙 Cancel 🛛 🖻	Expand all	Collapse all
Name	Ŷ	Assigned To
II Project Start Milestone		
🗄 \vee Engineering Study		
🗄 🛛 🗠 Evaluation Study		
Track weight requireme	nts	
II New Task		С

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



f. Continue to decompose the WBS as required.

# Identify the work using the Board view

Project Manager



#### 1. **CONFIGURE THE BOARD**

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

### Job Aid | Creating the project schedule in IQ Scheduler

Iterativ Project	/e project	- Saved			
Major Proj Active for 3	<b>ect</b> 3 days	<			Pla
Details	Ke	Tasks	Financials	🛄 Info	rmation
A	Board				
All Cat	egories 🔻	Search	n	Q	📡 Clear F

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.

Iterativ Project	e project	- Saved						 Project Manager	Active Status
Major Proje Active for 3	e <b>ct</b> days	<		Planning (3 D)		Б	ecution		
Details	Key Dates	Tasks	Financials	Information	E Tracking	Resources	Strategy	رى م	Link a proje
Timeline Cate Bucket 1	Board gories	Search	h + <	🔎 😿 Clear	Filters	(日 Grouped by E	Buckets $\vee$ +	B	New Bucke

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

#### 2. CAPTURE STOIES

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

Iterative project - Saved Project - Information $\checkmark$	
Major Project < Active for 3 days	Planning (3 D)
Details Key Dates Tasks	Financials 🔲 Information 📕 Tracking 📕
Timeline Board √ All Categories ✓ Searc	ch 🔎 😨 Clear Filters
Sprint 1	+ < Sprint 2 A + <

b. Define the story details.

Quick Create: Proje	ct Tas	:	×
Name	*	A	)
Category		General	
Bucket		🖾 Sprint 1	
Schedule Type	*	Auto	
Milestone		No	
Start		2/22/2022	Ē
Duration (Days)		1.00	
🗅 Finish		2/22/2022	
Effort (Hours)		0.00	

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

Creating the project schedule in IQ Scheduler

#### 3. ORGANIZE THE BOARD

Job Aid

10

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



# Establish dependencies

Project Manager



#### 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.

Project · Information ~		
Major Project < Active for 90 days	Planning (90 D)	
Details Ke A Tasks	Financials 🔲 Information 📘 Tracking	Resources Strategy
Timeline A		
🛛 All Categories 🗸 Searc	n 🔎 📡 Clear Filters 🛛 Add 1	ask +

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.

Timeline     Board       V     All Categories     V       Search     V       + Add     Image: Expand all													
Name V Assigned To V		Start 🛛 🖓 I	Finish	Feb 07, 2022				F	Feb 13, 2022				
						м	Т	W T	F	S	1	5 N	1 Т
II Project Start Milestone			2022-02-14		2022-02-14			Project S	Start I	vilesto	C	3	5 y -
II 🗸 Engineering Study			2022-02-14		2022-03-14		Engineering Study 0%				6		
${\tt H}$ ${\tt ~~}$ Request for Information			2022-02-14		2022-02-14		Request for Information 0%			6			
II Prepare RFI	2022-02-14		2022-02-14				E		EFI	D			

- c. Create additional dependencies in the same way.
- d. Gaps and Overlaps can be created by dragging the Blue Gantt bar.

Creating the project schedule in IQ Scheduler



Job Aid

IQ

S	М	Т	W	Т	F	S	S	М	Т	v
	0%	Ь								
	0%									
	0%									
G	0%					h				
ate F	RFI res	ponse	es 🕞	0%					-	
	0%									

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.

Evaluate RFI responses • 0% Select 3	short Erors	► 0°		Ę
•		Ø	Task Information	
0%		Û	Delete Task	
		+	Add	> -
4173 - Conduct online l	bidder conference		Delete Dependency	>
4174 - Evaluate RFI resp	oonses		Convert	>
0%		Ē	Indent	_
_		≣	Outdent	

# Assign Resources

### 着 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.

Job Aid |

### Creating the project schedule in IQ Scheduler



#### 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.

Projects line Board							
All Categories V	ilters Add Task	+					
🗛 🖉 Edit 📋 Delete 🛛 🔄 Outdent 🛛 Expand all	Collapse all						
Name V Assigned To N	7 Start	♥ Finish	Y	Feb 07, 2022	Feb 13, 20	22	Feb 20, 2022
				M T W T F S	S M	T W T F S	S M T W
II Project Start Milestone	2022-02-14	2022-02-14		Project Start Milestone	e 0% -	1	
🗄 🛛 🗠 Engineering Study	2022-02-14	2022-03-11		Engineering Study	y 0%		
II V Request for Information	2022-02-14	2022-02-23		Request for Information	n 0%		
A Conduct online bidder conferen Tina Hamilton,Randy R	2022-02-14	2022-02-18		Conduct online bidder conference	e 🄸 0%		
II Evaluate PEI remonser	2022-02-19	2022-02-22			Evoluato RE		

- b. Click on the **Resources Tab.**
- c. View and update (or delete) details related to the resource assignments.

Conduct online bidder conference - Saved Project Task		Composite Track Engineering Study Project Pa	equest for Information
B Resources Dependencies Child Tasks		C 🖉 Edit 🖹 Delete Resource Assig	ম Email a Link :
✓ Resource ∨	Units ∨	ls External ∨	I R
C Tina Hamilton Randy Reporter	•	100.00 No 100.00 No	<b>→</b>
Albert Connell		100.00 No	<b>→</b>
		K	$\leftarrow$ Page 1 $\rightarrow$

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

Condu Project Ta	ct online bidder conference - Saved	Composite Track Engineering Study Request for Information Project Parent Task	
Details	Resources Dependencies Child Tasks		
			D + New Resource Assign ○ Refresh ~ Grow ∨
~	Resource $\vee$	$ $ Units $\vee$	ls External ∨
	Tina Hamilton		100.00 No
	Randy Reporter		100.00 No
	Albert Connell		100.00 No
			$\leftarrow$ Page 1 $\rightarrow$

#### 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**.



Job Aid

Creating the project schedule in IQ Scheduler

Timel	ine Board								
\[ All	Categories V Search	🔎 🦙 Clear Filt	ters Add Task	+			A	⊞ tt ∨ ⊢∨ ∣ Q	Q + U
+ Add  Expand all  Collapse all Show Overallocation									
Na	ime 🗸	Assigned To V	Start	♥ Finish ♥	Feb 07, 2022	Feb 13, 2022	Feb 20, 2022	Feb 27, 2022	N
					M T W T F S	S M T W T F	S S M T W	T F S S M T	W T F S S
H ~	Tina Hamilton		2022-02-14	2022-03-08	Tina Hamilto	n 09			
	Conduct online bidder conference	Tina Hamilton,Randy R	2022-02-14	2022-02-18	Conduct online bidder conferen	e 🕩 09.			
	Define weekly wear tolerances	Tina Hamilton	2022-03-04	2022+03+04				Define weekly wear tolera	inces 🏓 📧 🕂 📆
	Wear tolerances complete	Tina Hamilton	2022-03-07	2022-03-07					Wear tolerances complet
	Solicit noise evaluation criteria	Tina Hamilton	2022-03-08	2022+03+08				So	licit noise evaluation crit
	Evaluation criteria complete	Bill Tibbetts[21.88%],Al	2022-02-16	2022+02+22	Evaluation crit	B aplete 🕩 🕫		🔁 🕶 🖽 🐨	
	Environmental conditions complete	Tina Hamilton	2022-03-04	2022-03-04				Environmental conditions of	complete 🔸 🚺
	Capture 5 year weekly minimum,	Evon Tech[43.75%],Tina	2022-02-22	2022+03+03	Capture 5 year weekly	minimum, average and maximum t	emperatures 🔸 🕼		
	Capture 5 year weekly minimum,	Tina Hamilton	2022-03-03	2022+03+03		Capture	5 year weekly minimum, ave	rage and maximum humidity ranges	-> 0% - TH Tin
	Document minimum, average an	Tina Hamilton,Evon Tec	2022-02-15	2022-02-15	Document minimum, average and	i max 📴 🖽 🗊	RR AC		
H ~	Randy Reporter		2022-02-14	2022+02+18	Randy Report	ar 0%	1		
8	Conduct online bidder conference	Tina Hamilton,Randy R	2022-02-14	2022-02-18	Conduct online bidder conferen	e 0%			

# 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.

Projects line Board								
V     All Categories     Search     Search     Add Task     +								
B 🖉 Edit 🔟 Delete 🔄 Outdent 🗇 Expand all 🗇 Collapse all								
Name V Assigned To V	Start 🛛 🖓	Finish 🛛	Feb 07, 2022 Feb 13, 2022 Feb 20, 2022					
			M T W T F S S M T W T F S S M T W					
II Project Start Milestone	2022-02-14	2022-02-14	Project Start Milestone 0%					
II 🗸 Engineering Study	2022-02-14	2022-03-11	Engineering Study 0%					
II V Request for Information	2022-02-14	2022-02-23	Request for Information 0%					
B Conduct online bidder conferen Tina Hamilton,Randy R	2022-02-14	2022-02-18	Conduct online bidder conference - 0%					
II Evaluate RFL responses	2022-02-18	2022-02-22	Evaluate REL responses -> 0%					

- c. Ensure you are on the **Details tab**.
- d. Enter both the **Duration and the Effort estimates** for the task.

Concrete on the window of the second of the	er conference - Saved pendencies Child Tasks				Composite Track Engineering Study Project	Request for Information Parent Task
General			Timeline			
Name	Conduct online bidder conference		Schedule Type	Auto		
Category			🔒 Summary	No		
Due Date			Milestone	No		
Notes			Start	2022-02-14		
		С	Duration (Days)	5.00		
			🛆 Finish	2022-02-18		
		C	Effort (Hours)	120.00		
Board			Effort Completed (Hours)	0.00		
Sprint			Effort Remaining (Hours)	120.00		
Bucket	***		Percent Complete	0		
Size	***					



Job Aid |

## Creating the project schedule in IQ Scheduler

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

Conduct online bidder conference - Saved Project Task					
E		Resources Dependencies Child Tasks			
			0	Edit	
	~	Resource $\vee$ Units $\vee$	Is Externa	IV.	
		Tina Hamilton 33.00	No		
		Randy Reporter 33.00	No		
	~	Albert Connell	No		