

#### 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.

Composi Project · Inf	ite Track E	ngine	ering Stu	dy - Saved			 Project Manager	Active Status	Engineering Portfoli Portfolio
Major Project Active for 90 c		<		Planning (90 D)		E	Kecution		Closin
Details K		Tasks	Financials	Information	Tracking	Resources	Strategy	в	থ্য Link a project

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

Composite Track Engineering Study - Saved Project - Information $\lor$					
Major Pro Active for S		<			
Details	Key Dates	Tasks	Financials	Information	
Timeline	C				S

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		1
√ All Categories  ✓ Search	Project Start Milestone +	
+ Add 🛛 🗉 Expand all 🖃 Collapse all		1

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

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

Project Start Milestone					
🗂 🖬 Save 👹 Save & Cl	ose 🚺 Deactivate 📋 Delete 🖒 Refresh 🔍 Check Access 🤒 A	ssign L	Share	🕼 Email a Link	≫ Flow ∨ d
Project Start Mileston Project Task Details Resources Deput					
General			Timelin	e	
Name *	Project Start Milestone		Scher	dule Type 🔹 🗴	Auto
Category			🔒 Sumr	mary	No
Due Date	[	F	Miles	tone	No
Notes		-	Start		No Yes
		F	Durat	tion (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	ک e all	Add Task	+
Name 🏾 🖓	Assigned To $\forall$	Start 🛛	Finish $\bigtriangledown$
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		
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II Project Start Miles	tone		
Engineering Study	r		
Evaluation Study			

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

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II Project Start Milestone			2022-02-14	2022-02-14
🗄 \vee 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	Task Information		2022-02
		Delete Task	2022-02		
В		+	Add	>	📥 Above
			Delete Dependency	>	⊊ Below

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

All Categories V	Search	/
🖺 Update 🛛 🗙 Cancel 🛛	主 Expand all	⊡ Co
Name	Y	Assign
II Project Start Milestone		
III 🗸 Engineering Study		
Evaluation Study		
New Task		C

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

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Name		Y	Assigned To	Y
Project Start Mileston	2			
II \vee Engineering Study				
Evaluation Study				
D 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**.

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Type the name of the task. C.

Timeline Board		
√ All Categories  ✓ Search		🔎 🏹 Clear F
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Name	V	Assigned To
II Project Start Milestone		
III · · · Engineering Study		
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Track weight requirements		
Hew Task		C

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



Continue to decompose the WBS as required. f.

### 4. SET TASK TYPE

g. Select the **task** you wish to set the task type for and **click edit** from the sub-ribbon.

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Timeline Board					
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Project Start Mile	Project Start Milestone				
🗄 🖂 Engineering Study					
🗄 🛛 🗠 Request for Infe	ormation				
A Conduct onlin	ne bidder conferen…	Tina Hamilton[3			

c. Set the **Task Type** as appropriate for each **task's delivery characteristics** 

If the type is **Fixed Duration**, the duration of this work is set, and it won't change, even if you modify resources/units or work on the task.

If the type is **Fixed Work,** the work for this task is set, and it won't change, even if you've changed the duration or if resources/units change.

And finally, If **the type is Fixed Unit**, the number of resources assigned to the task is set and it won't change, even if the duration or work changes.

	Timeline		
	Schedule Type	* Auto	
С	Task Type	Fixed Unit	
	🛆 Summary	Select Fixed Duration Fixed Work	
	Milestone	Fixed Unit	1

## Identify the work using the Board view

着 🛛 Project Manager



### 1. CONFIGURE THE BOARD

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

Iterative project Project · Informatio				
Major Project Active for 3 days	<			Pla
Details Ke A	Tasks	Financials	🔲 Info	rmation
Board				
√ All Categories	✓ Search		2	📡 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.



### Creating the project schedule in IQ Scheduler

	re project			0				 Project Manager	Active Status
Major Proj Active for 3		<		Planning (3 D)		Б	ecution		
Details	Key Dates	Tasks	Financials	Information	📕 Tracking	Resources	📘 Strategy	ଙ୍	Link a projec
Timeline	Board egories V	Search	h + <	🔎 🚡 Clear	Filters	(日 Grouped by E	Buckets $\vee$ +	B	New Bucket

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.

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  ✓ Search	h 🔎 🔀 Clear Filters
Sprint 1	+ < Sprint 2 A + <

b. Define the story details.

Quick Create: Proje	 	×
Name	 🔺	
Category	General	
Bucket	🛱 Sprint 1	
Schedule Type	Auto	
Milestone	No	
Start	2/22/2022	
Duration (Days)	1.00	
🛱 Finish	2/22/2022	iii)
Effort (Hours)	0.00	

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.

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# Establish dependencies

Project Manager



#### CREATNG DEPENDENCIES IN THE TIMELINE VIEW 1

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



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.

All Categories V	irch	2 2	Clear Filt	ers Add Task	+									
+ Add 🛛 🗉 Expand all	Collapse a	ili -												
Name V Assigned To V				Start N	Finish	Feb 07, 2022						Feb 13, 2022		
						м	Т	W T	F	S	s	м		
Project Start Milestone				2022-02-14	2022-02-14	Project Start Milesto				35	ķ			
Engineering Study				2022-02-14 2022-03-14			Engineering Study 0%							
Request for Information				2022-02-14	2022-02-14			Request f	or Info	ormatio	in	0%	Ē	
Prepare RFI				2022-02-14	2022-02-14				B		FI C	: 7%		

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







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### Creating the project schedule in IQ Scheduler

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.

Ti	imeline Board				
Y	All Categories 🗸 Search		<u>р</u>	Clear Filte	ers
B	Update 🗙 Cancel 🗐 Expan	d all	Collapse a	all	
	Name	7	Assigned To	Ŷ	Start
	Project Start Milestone				2022
	Engineering Study				2022
	✓ Request for Information				2022
	Conduct online bidder confe		1 selected	× ~	2022
	Evaluate RFI responses				2022
	Select 3 short list vendors		Albert (	c	2022
	RFI complete		Bill Tibl		2022

### 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.



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Projects line Board																		
→ XII Categories → Search 🔎 📡 Clear Fi	Iters Add Task	+																
A Z Edit Delete 🖭 Outdent 🗊 Expand all	Collapse all																	
Name V Assigned To V	Start		Y	Feb 07, 20	22			F	eb 13	, 202	2				Fei	20, 20	22	
				M T	W	Т	F	S S	5 N	1 1	W	Т	F	S	S	М	Т	W
II Project Start Milestone	2022-02-14	2022-02-14			Proje	ct Start	Mile	stone	0	6								
II 🗸 Engineering Study	2022-02-14	2022-03-11				Enginee	ring	Study	05	6								
II V Request for Information	2022-02-14	2022-02-23		F	eque	ist for Ir	form	ation	05	6								
A Conduct online bidder conferen Tina Hamilton,Randy R	2022-02-14	2022-02-18		Conduct or	line	bidder o	:onfe	rence [	▶ 0	%				H		RR	4C	
II Evaluate REL responses	2022-02-18	2022-02-22						E	valuate	REL	esnon	[	► 0%					L

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

	Composite Track Engineering St Project	udy Request for Information Parent Task
		sio 50 Email a Link :
Units 🗸	is External ∨	sig au Email a Link :
•	100.00 No 100.00 No	<b>→</b>
	100.00 No	→ K- ← Page 1 →
		Friguri C Left @ Delete Resource Ar Uont ∨ Is Deemal ∨ • 10000 No 10000 No

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

Conduct online bidder conference - Saved Project Task			uest for Information Int Task
Details <b>Resources</b> Dependencies Child Tasks			
		D + New Resource Assign 🖒 Refresh	$_{\rm e'^{\rm e}}$ Flow $\checkmark$ :
$\checkmark$ Resource $\lor$	Units 🗸	ls External ∨	В
Tina Hamilton		100.00 No	
Randy Reporter		100.00 No	
Albert Connell		100.00 No	
		K-	$\leftarrow$ 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**.

Timel	ine Board					
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≡ ~	Tina Hamilton		2022-02-14	2022-03-08	Tina Hamilton 09.	
	Conduct online bidder conference	Tina Hamilton, Randy R	2022-02-14	2022-02-18	Conduct online bidder conference  0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	
	Define weekly wear tolerances	Tina Hamilton	2022-03-04	2022-03-04	Define weekly wear tolerances 🕩 🚥	
	Wear tolerances complete	Tina Hamilton	2022-03-07	2022-03-07	Wear tolerances cor	mplet
	Solicit noise evaluation criteria	Tina Hamilton	2022-03-08	2022-03-08	Solicit noise evaluation	n crite
	Evaluation criteria complete	Bill Tibbetts[21.88%],Al	2022-02-16	2022-02-22	Evaluation cm B and te 🕩 07.	
	Environmental conditions complete	Tina Hamilton	2022-03-04	2022-03-04	Environmental conditions 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 temperatures 🔸 🕫	G
	Capture 5 year weekly minimum,	Tina Hamilton	2022-03-03	2022+03+03	Capture 5 year weekly minimum, average and maximum humidity ranges	Tin
	Document minimum, average an	Tina Hamilton,Evon Tec	2022-02-15	2022-02-15	Document minimum, average and max 05- 11 ET (IR) AG	
≡ ~	Randy Reporter		2022-02-14	2022-02-18	Randy Reporter 0%	
	Conduct online bidder conference	Tina Hamilton, Randy R	2022-02-14	2022-02-18	Conduct online bidder conference 0% TH RR AC	

## Estimate the work

#### Project Manager

Creating the project schedule in IQ Scheduler

### 1. ESTIMATING THE WORK

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10

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										
♥ All Categories ∨ Search > √ Clear Fi	Iters Add Task	+								
B Z Edit 🗊 Delete 🥶 Outdent 🗇 Expand all	Collapse all									
Name V Assigned To	7 Start	7 Finish	Y	Feb 07, 2022	Feb 13, 2	022			Feb 20,	2022
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II Project Start Milestone	2022-02-14	2022-02-14		Project Start Mileston	ne 0%	կ				
II 🗸 Engineering Study	2022-02-14	2022-03-11		Engineering Stud	iy 0%					
II V Request for Information	2022-02-14	2022-02-23		Request for Informatio	on 0%					
B Conduct online bidder conferen Tina Hamilton,Randy R	2022-02-14	2022-02-18		Conduct online bidder conference	;e 🏼 🕨 0%			H	H RR	<b>A</b> C
II Evaluate PEI remonster	2022-02-18	2022-02-22			Evaluate 5					

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

oject Task	oidder conference - Saved				Composite Track Engineering Study Project	Request for Informati Parent Task
etails Bes	Dependencies Child Tasks					
General			Timeline			
Nama	Conduct online bidder conference		Schedule Type	Auto		
Category			A Summary	No		
Due Date		E2	Milestone	No		
Notes	322		Start	2022-02-14		
		C	Duration (Days)	5.00		
			A Finish	• 2022-02-18		
		C	Effort (Hours)	120.00		
Board			Effort Completed (Hours)	0.00		
Sprint			Effort Remaining	120.00		
Bucket	(and		(Hours) Percent Complete	0		
Size	100			5.		

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								Comp Project		
E	Resources	ependencies	Child Tasks							
									Ø	Edit
	Resource 🗸					Units 🗸			Is Externa	l V
	Tina Hamilton							33.00	No	
	Randy Reporter							33.00	No	
•	Albert Connell				E			34.00	No	