

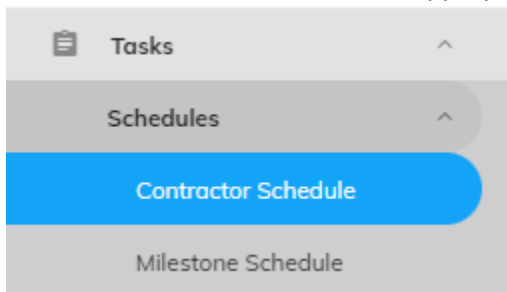
5.1.2 What is the Schedule Feature?

With Projectmates schedule tool, building task-based timelines for projects is easy. Group tasks, set predecessors, assign responsibilities, set reminders, and more. Everyone on your team will be able to access the project schedule(s) from anywhere on any device, making it easy when you're in the office or on-the-go.

5.1.3 Viewing the Schedule

A project's schedule(s) can be accessed by navigating to the project through the **My Projects** page.

1. Once inside of a project, the schedule tool can be found on the left-side menu by clicking **Tasks > Schedules**. From there, select the appropriate schedule type.



2. Tasks will be ordered chronologically, with the task's **Description**, **% Complete**, **Start & Finish** dates, **Duration**, and **Predecessor** relationships noted.

A screenshot of the 'Contractor Schedule' view in a software application. It features a table with columns for task details. The table is filtered to show tasks under 'Construction project One' and 'Long Lead Procurement'. The tasks are ordered chronologically by start date. The table includes columns for task number, WBS code, description, completion percentage, start and finish dates, duration, and predecessor relationships. A search bar and a 'Show Subtasks' checkbox are visible at the top of the table area. The bottom right corner indicates 'Showing 100 of 140' items.

	No. ↑	WBS	Description	% Complete	Start	Finish	Duration	Predecessors
☐	1	1	Construction project One	14%	Sep 05, 2022	Aug 26, 2025	777 Days	
☐	2	1.1	General Conditions	100%	Aug 12, 2024	Sep 13, 2024	25 Days	
☐	3	1.1.1	Receive notice to proceed and sign contract	100%	Aug 12, 2024	Aug 19, 2024	6 Days	
☐	4	1.1.3	Prepare and submit project schedule	100%	Aug 28, 2024	Aug 30, 2024	3 Days	5FS
☐	5	1.1.2	Submit bond and insurance documents	100%	Aug 21, 2024	Aug 27, 2024	5 Days	3FS+1
☐	6	1.1.4	Prepare and submit schedule of values	100%	Sep 03, 2024	Sep 13, 2024	9 Days	4FS+1
☐	7	1.1.5	Obtain building permits	100%	Aug 20, 2024	Aug 23, 2024	4 Days	3FS
☐	8	1.1.6	Submit preliminary shop drawings	100%	Aug 26, 2024	Sep 06, 2024	10 Days	7FS
☐	9	1.1.7	Submit monthly requests for payment	100%	Aug 20, 2024	Aug 20, 2024	1 Day	3FS
☐	10	1.2	Long Lead Procurement	0%	Aug 21, 2024	Nov 26, 2024	70 Days	
☐	11	1.2.1	Submit shop drawings and order long lead items - steel	0%	Aug 21, 2024	Sep 03, 2024	10 Days	9FS
☐	12	1.2.2	Submit shop drawings and order long lead items - roofing	0%	Sep 09, 2024	Sep 20, 2024	10 Days	8FS
☐	13	1.2.3	Submit shop drawings and order long lead items - elevator	0%	Sep 09, 2024	Sep 20, 2024	10 Days	8FS

5.1.4 Importing a new Schedule

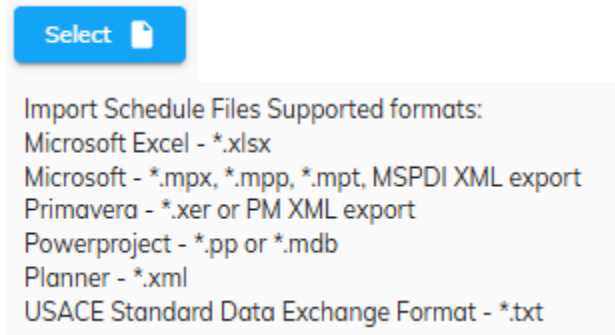
Projectmates allows users to import schedules formatted through our Excel template, or from an external system – such as Primavera (.xer) or Microsoft Projects (.mpp).

Importing from Project or Primavera

1. Within a schedule, selected from the left side bar menu: Click **More** in the top right-hand corner, and select **Import/Export**

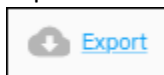


2. From the schedule import/export menu: Click **Select** to open your computer's file browser and locate your external schedule system file; or drag and drop the file into this screen

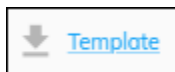


Importing from Excel

1. Export the current schedule tasks into Projectmates template format



2. Or download the blank Projectmates format template



- a) Open the blank template in Excel
 - b) The template allows you to fill in all necessary fields, with a sample task row provided.
3. The columns marked in blue denote a required field, crucial for successful importing back into your Projectmates schedule

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	DisplayId	WBS	Name	Base Start	Base Finish	Planned Start	Planned Finish	Actual Start	Actual Finish	IsParent	TaskOutlineLevel	Predecessors	Pred
2		1	Sample Task			08/05/2022	09/04/2022			0	0		
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													

4. Select the checkbox to confirm acknowledgement that **“All existing items will be deleted on upload”**. This ensures that a schedule isn't duplicated by accident and will overwrite anything that previously existed.

5. Click **Import**

Schedule import/export [Template](#) [Export](#)

☒ All existing items will be deleted on upload - check to confirm

Import Schedule Files Supported formats:
Microsoft Excel - *.xlsx
Microsoft - *.mpx, *.mpp, *.mpt, MSPDI XML export
Primavera - *.xer or PM XML export
Powerproject - *.pp or *.mdb
Planner - *.xml
USACE Standard Data Exchange Format - *.txt

[Select](#) RegisterSDImportTemplate.xlsx

[Close](#) [Import](#)

5.1.5 Creating/Editing Tasks

1. Click **+ Task** to create a new task for a schedule



2. In the “Create new task” window, enter a **Task Name**
3. Enter the **Planned Start** and **Planned Finish** dates
4. If applicable, enter the **Actual Start** and/or **Actual Finish** dates
5. Milestone tasks can be designated with the toggle option
6. Click **Save** once complete

Create new task

General

Advanced

Resources

Predecessors

Links >

Task name *

New Task 1

Duration *

5

Day(s)

▼

Estimated?

☐

Planned Start

Jan 27, 2025

📅

Planned Finish

Jan 31, 2025

📅

☐ Create baseline schedule

Actual Start

📅

Actual Finish

📅

Priority

500

% Complete

0%

25%

50%

75%

100%

Disabled

☐

Make this task a milestone

☐

Send email update to project team

☐

Show Holidays ^

Prev Task

Next Task

Close

Save

7. New tasks will automatically appear at the end of the schedule. To move a task to a new spot in the schedule, click the 6 dots on the left-hand side to drag and drop the task to a new location.

☐	⋮	21	New Task	0%	Aug 01, 2024	Aug 01, 2024	1 Day	
☐	⋮	22	Warranty Inspection	0%	Jun 20, 2029	Jun 20, 2029	1 Day	16FS+330
☐	⋮	23	New Task 1	0%	Jan 27, 2025	Jan 31, 2025	5 Days	

Showing 23 of 22

Adding a new task before/after an existing task

Another way to add new tasks is to insert them directly before/after an existing task.

- Select the checkbox next to the existing task

Contractor Schedule									
Search Show Subtasks + Task Views More									
☐	No. ↑	WBS	Description	% Complete	Start	Finish	Duration	Predecessors	
☐	1	1	Construction project One	14%	Sep 05, 2022	Aug 26, 2025	777 Days		
☐	2	1.1	General Conditions	100%	Aug 12, 2024	Sep 13, 2024	25 Days		
☐	3	1.1.1	Receive notice to proceed and sign contract	100%	Aug 12, 2024	Aug 19, 2024	6 Days		
☐	4	1.1.3	Prepare and submit project schedule	100%	Aug 28, 2024	Aug 30, 2024	3 Days	5FS	

2. Use the arrow buttons to select **Before** or **After**

The screenshot shows the 'Contractor Schedule' interface. At the top, there is a search bar and a 'Show Subtasks' checkbox. Below this is a toolbar with various icons, including a green box highlighting the 'Add task before' and 'Add task after' buttons. A green arrow points from this box to a detailed view of these buttons on the right. The detailed view shows two buttons: 'Add task before' and 'Add task after', each with a green box around it and a hand icon indicating a click. The main task list on the left includes tasks like 'Construction project One', 'General Conditions', 'Receive notice to proceed and sign contract', and 'Prepare and submit project schedule'.

3. Follow the previous steps to enter the new task details and **Save**

5.1.6 Setting up predecessors

Predecessor relationships can be set between tasks, allowing automated changes to tasks as the schedule is manipulated and actioned.

1. Select a task to edit, and click the **Predecessors** tab

The screenshot shows the '23. New Task 1' form. The 'Predecessors' tab is selected and highlighted with a green box. A green arrow points from the 'Predecessors' tab to the 'Add task before' and 'Add task after' buttons in the toolbar. The form includes fields for 'Task name' (New Task 1), 'Duration' (5), and a dropdown for 'Day(s)'. There is also a toggle for 'Estimated?'.

2. Click the + button

23. New Task 1

General Advanced Resources **Predecessors** Links >

Task name
New Task 1

Duration
5 Day(s)

Predecessors

Oh, there's nothing here.

Prev Task Next Task Close

3. Select a task from the dropdown that this task will be dependent on

Predecessors

No.	Task	Type	Lag (Days)	Actions
	Type here to select...	Finish to Start (FS)	0	
1	Study			
2	Design			
3	50% Design			
4	90% Design			
5	100% Design			

4. The dependency **Type** options are:
 1. Finish-Start (Task A finishes = Task B starts)
 2. Finish-Finish (Task A finishes = Task B finishes)
 3. Start-Finish (Task A starts = Task B finishes)
 4. Start-Start (Task A starts = Task B starts)

5. In the **Lag (Days)** field, denote any positive or negative lags days between the dependent task and the current task

Predecessors				
No.	Task	Type	Lag (Days)	Actions
2	2 - Design	Finish to Start (FS)	0	 

Finish to Start (FS)

Start to Start (SS)

Finish to Finish (FF)

Start to Finish (SF)

6. Click the **Save** icon under **Actions**

Predecessors				
No.	Task	Type	Lag (Days)	Actions
2	2 - Design	Finish to Start (FS)	0	 

5.1.7 Assigning Resources

1. Select a task to edit, and click the **Resources** tab

23. New Task 1

General Advanced **Resources** Predecessors Links >

Task name* Duration* Day(s) ☐ Estimated?

2. Choose a specific **User** or **Role** to assign this task
3. You have the option to **Send Reminders** and set the number of days before/after a task

4. Click **Save**

23. New Task 1

General Advanced **Resources** Predecessors Links >

Task name
New Task 1

Duration
5 Day(s)

Assign Resources

☒ User ☐ Role

Users

Send Reminders

0 days After Task End Date

Set day(s) greater than zero to trigger reminder email.

Prev Task Next Task

Close **Save**

5.1.8 Gantt Chart View

The schedule can be viewed with a Gantt chart for a more visual experience.

1. Click **Views**
2. Select **Gantt Chart**

Contractor Schedule

Search

☒ Show Subtasks

+ Task **Views** More

Baseline to Planned
Planned to Actual
Gantt Chart

	No. ↑	WBS	Description	% Complete	Start	Finish
☐	1	1	Construction project One	14%	Sep 05, 2022	Aug 01, 2025

3. Tasks will be ordered chronologically with a Gantt Chart panel on the right-hand side

