SIEMENS

Active Workspace 5.1

Schedule Management

AW025 - 5.1

Contents

1. About managing schedules

Use schedules to plan and track project tasks. A properly executed schedule ensures that your project is completed on time, within budget, and to the satisfaction of the project stakeholders:

- As a schedule coordinator, you can create schedules and add members and tasks, assign tasks to team members, and modify schedule properties.
- As a team member assigned to the schedule, you can track tasks that are assigned to you and update work against your tasks.
- As a project stakeholder, you can view the schedule to monitor the progress being made against this project initiative.

2. Search for a schedule or a schedule task

Use this procedure to search for a specific schedule or schedule task.

1. In the global search box, enter the search criteria, such as the schedule name, and click **Search**.

2. (Optional) Filter the search results to narrow the number of items that display in the **Results** list.

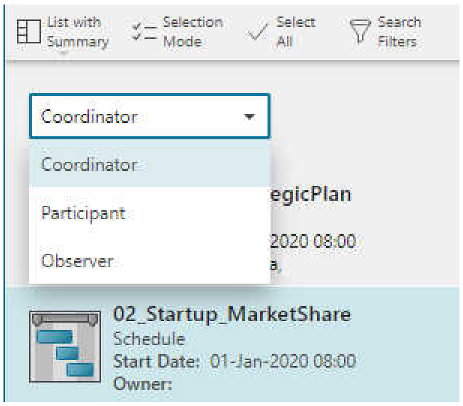
Alternatively, click the tiles on the home page to view only those schedules or schedule tasks that you are assigned to.

> Note:
>
> If your administrator has configured a quick access query for schedules, you can also select **Schedules** from the **Quick** search list in the **Advanced Search** panel.

3. Filter schedules and schedule tasks

You can use the following filter options on the schedule, schedule task, or Gantt locations (**Search Filters** only) to quickly and easily find a schedule, schedule task, or milestone.

- **Role Filters**. Quickly filters the list by role, such as **Coordinator**, **Participant**, or **Observer**.



- **Search Filters**. Opens the **Filters** panel, which contains many filter properties. This is useful when you work with large schedules, or a large number of schedules, where it's difficult to find the data you need.

1. Navigate to the schedule, schedule task, or Gantt location by doing one of the following.

To	Do
Navigate to the schedule location.	Click **SCHEDULES** on your home page.
Navigate to the schedule task location.	Click **SCHEDULE TASKS** on your home page.
Navigate to the Gantt location.	a. Click **SCHEDULES** on your home page. b. Select a schedule from the list and click **Open**. c. Click the **Gantt** tab.

2. Click **Search Filters**.

3. On the **Filters** panel, select the desired properties to filter the list. The following applies.

- Select one or more properties to filter the list. A check mark appears next to a property when it is applied and the property displays in the filter breadcrumb.

- To remove a filter, click the selected property filter in the list again or click ✕ next to the property in the breadcrumb.

- In the **Gantt** view, use the **Start Date** or **Finish Date** fields to filter by date or date ranges. You can also filter by the schedule and subschedule **State**, **Status**, **Priority**, **Task Type**, and **Schedule Deliverables**.

If there is	The date filters are grouped in
More than one year of data	One-year increments
Between one month and one year of data	One-month increments
Between one week and one month of data	One-week increments
One week of data	One-day increments

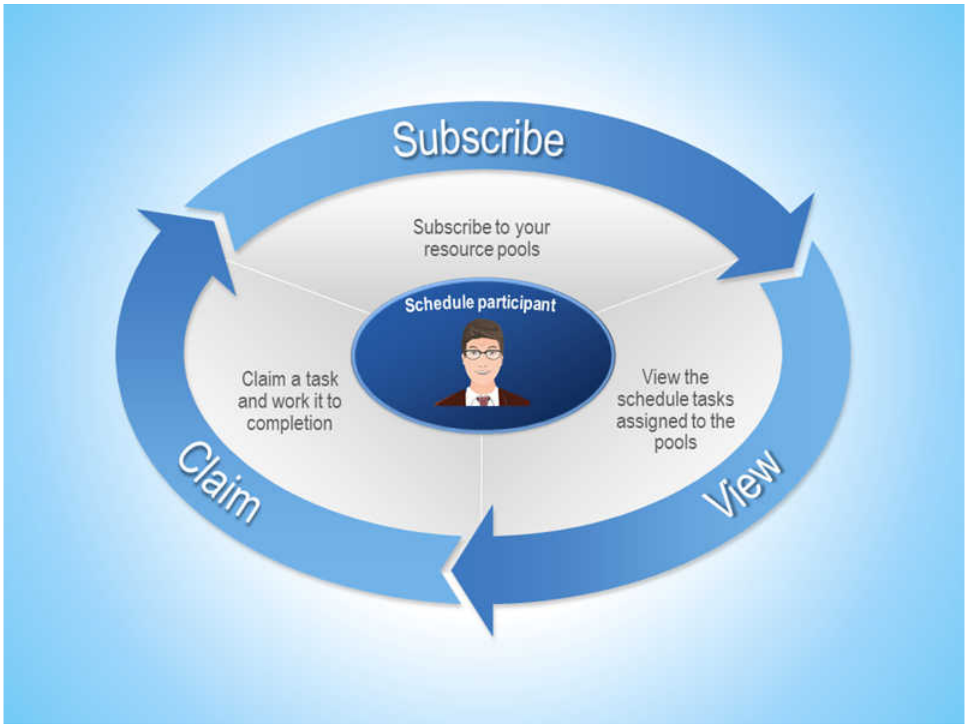
- When filtering from the schedule location or schedule tasks location, the date filter is in YYYY-MM format.

- Properties are not displayed if there is no associated property data.

- When filtering from the **Gantt** view, the filters are applied to schedules and subschedules.

4. Subscribe to a resource pool

You can subscribe to resource pools to view any schedule tasks assigned to the resource pools instead of a specific user. In most cases, a resource pool contains users that all have a similar role, such as schedule or workflow participants, change analysts, and engineers. The schedule coordinator may assign schedule tasks to a resource pool when there are multiple users that can claim that task and work it to completion. Once you claim a schedule task assigned to a resource pool, the task is assigned to you and removed from the list of tasks assigned to the resource pool.



1. From the global navigation, click your profile icon and then select **Profile** to open your user profile page.

2. In **RESOURCE POOL SUBSCRIPTIONS**, click **Add** ⊕.

3. From the **Add** panel, select one of the following options to show which resource pools display in the list.

   - Select **Accessible** to only show the resource pools you are permitted to join.

   - Select **All** to show all the resource pools in your organization.

4. (Optional) Use the **Filter** box to quickly find a desired resource pool.

5. Click **Add**.

The resource pool appears under **RESOURCE POOL SUBSCRIPTIONS**.

6. Now that you have subscribed, you can **view the schedule tasks Teams tab to claim schedule tasks assigned to your resource pools.**

Unsubscribe from a resource pool

If you no longer need to subscribe to a resource pool, you can easily remove it from your profile page.

1. From the global navigation, click your profile icon and then select **Profile** to open your user profile page.

2. In **RESOURCE POOL SUBSCRIPTIONS**, select the resource pool you want to remove.

3. Click **Remove** ⊖.

   When you remove yourself from a resource pool subscription, you are no longer able to view or claim schedule tasks assigned to the pool.

5. Using the Gantt view to manage schedules

About the Schedule Manager Gantt view

You can use the Gantt tab to view schedules and schedule tasks in a graphical view. Some schedule and schedule task actions can be performed in both the Gantt view and in other locations. Some actions, such as viewing the schedule's critical path or performing a *what-if* analysis, can only be performed from the Gantt view.

> Tip:
>
> - To select multiple schedules and tasks, hold the **Ctrl** key as you select them.
> - Some of the actions below can also be performed by right-clicking a schedule or task in the Gantt view.

You can perform the following actions from the work area toolbar in the Gantt view.

- View task details in a summary view.
- View task deliverables and dependencies from the summary view.
- Apply search filters.
- Set the zoom level.
- View task information directly in the Gantt chart.
- Expand and collapse task and schedules with child objects.
- Recalculate a schedule.
- View the schedule's critical path.
- Perform a What-if analysis and promote changes into the schedule.
- Insert a subschedule.
- Add or delete new schedule tasks and milestones.
- Create task dependencies.

- View workflow information for a schedule task.

Add tasks and milestones from the Gantt view

You can quickly add new tasks and milestones to a schedule from the Gantt view, or delete these objects if they are no longer needed.

Add a new task

1. From the work area toolbar, click **Add Task**.

   A new task is added to the schedule.

2. Do any of the following to change the task information:

   - Double-click the task name in the **Gantt** view to change it.
   - Select the task and then click **Information** on the primary toolbar to view and edit the task properties.
   - Select the task and then click **Open** on the primary toolbar to view all the task properties. From here, you can edit the task properties, add deliverables, and assign resources to the task.

Add a new milestone

1. From the work area toolbar, click **Add Milestone**.

   A new milestone is added to the schedule.

2. Do any of the following to change the milestone information:

   - Double-click the milestone name in the **Gantt** view to change it.
   - Select the milestone and then click **Information** on the primary toolbar to view and edit the milestone properties.
   - Select the milestone and then click **Open** on the primary toolbar to view all the milestone properties. From here, you can edit the milestone properties, add deliverables, and assign resources to the milestone.

Delete a task or milestone

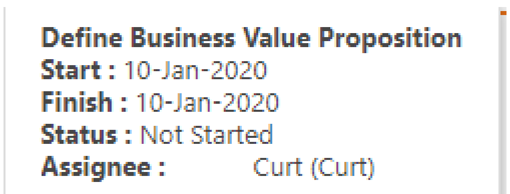
1. Select the task or milestone on the **Gantt** chart that you want to remove.
2. From the work area toolbar, click **Delete** to remove the task or milestone.

View task information, deliverables, and dependencies from the Gantt view

You can view task information from the Gantt view by hovering over the task, toggling the display of task information, and showing the task details in the summary view.

Hover over the task

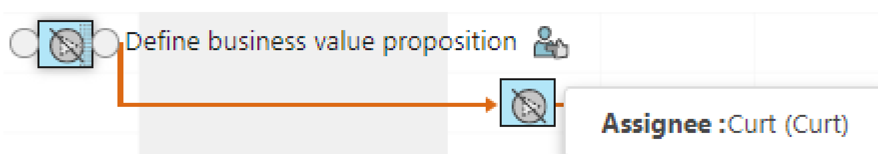
1. Hover over the task from the left column of the Gantt chart to see the task details, such as the **Start** and **Finish** dates and the task **Status**.



Toggle the display of task information

1. From the work area toolbar, click **Task Information**.

   The task title is displayed in the Gantt view. You can hover over the icon to also view the person assigned to the task.



Show task details in the summary view

In addition to viewing the task details and assigned resources from the summary view, you can also add and view task deliverables and view the task dependencies.

> Note:
>
> Information displayed in tables can be sorted, searched, filtered by date, exported, and so on. You can also change the display method, such as showing the information in a table, as a list, in a comparison view, or as images.

1. From the work area toolbar, click **Summary** to toggle the display of task details below the Gantt view.

2. Select the **Overview**, **Deliverables**, **Resources**, or **Dependencies** tab to view the corresponding details.

When viewing the task deliverables in the summary view, you can assign a task deliverable by clicking **Assign Task Deliverable** ⊕.

View deliverables and dependencies from the Gantt view

When you view a schedule using the Gantt view, you can select a schedule task and quickly view the deliverables and dependencies for the task. This allows you to track the status of deliverables and tasks across multiple schedules from one location.

View task deliverables

1. Select the task in the Gantt view.

2. From the work area toolbar, click **Summary** to toggle the display of task details below the Gantt view.

3. Click the **Deliverables** tab.

   The task deliverables and deliverable instances are displayed.

4. Alternatively, to just view task deliverables without opening the summary view, from the primary toolbar, click **View** > **Deliverables**.

   The **Deliverables** panel opens and the selected task's deliverables are displayed.

   > Note:
   >
   > For this command to appear in the primary toolbar, the selected task must have at least one assigned deliverable.

View task dependencies

1. Select the task in the Gantt view.

2. From the work area toolbar, click **Summary** to toggle the display of task details below the Gantt view.

3. Click the **Dependencies** tab.

   The **PREDECESSOR TASKS** and **SUCCESSOR TASKS** for the selected task are displayed. Additional information for the dependent tasks, such as a count of the deliverables, work complete, start and finish dates, state, and status are also displayed.

4. (Optional) To view the deliverables for the dependent tasks, first select the dependent task. Next, from the primary toolbar, click **View** > **Deliverables**.

The **Deliverables** panel opens and the selected task's deliverables and any dependencies are displayed.

Change Gantt zoom level

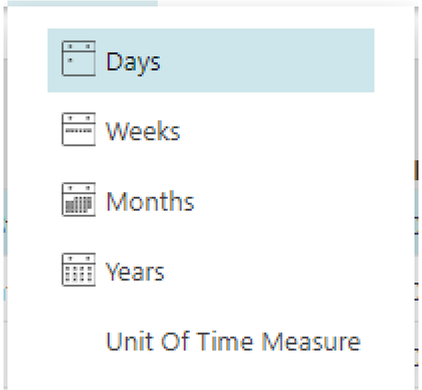
You can change the zoom level on the Gantt view to show a shorter or longer time period.

Your administrator defines the default unit of measure for schedules using the **AWC_SM_Unit_Of_Time_Measure** preference. The defined unit of measure is applied when you create the schedule.

> Tip:
>
> The default unit of measure for the Gantt view can be updated from the schedule's **Overview** page. The Gantt table adjusts the zoom level to the unit of measure set.

Set zoom level from the work area toolbar

1. From the work area toolbar, click **Set Zoom** to view the different zoom levels.

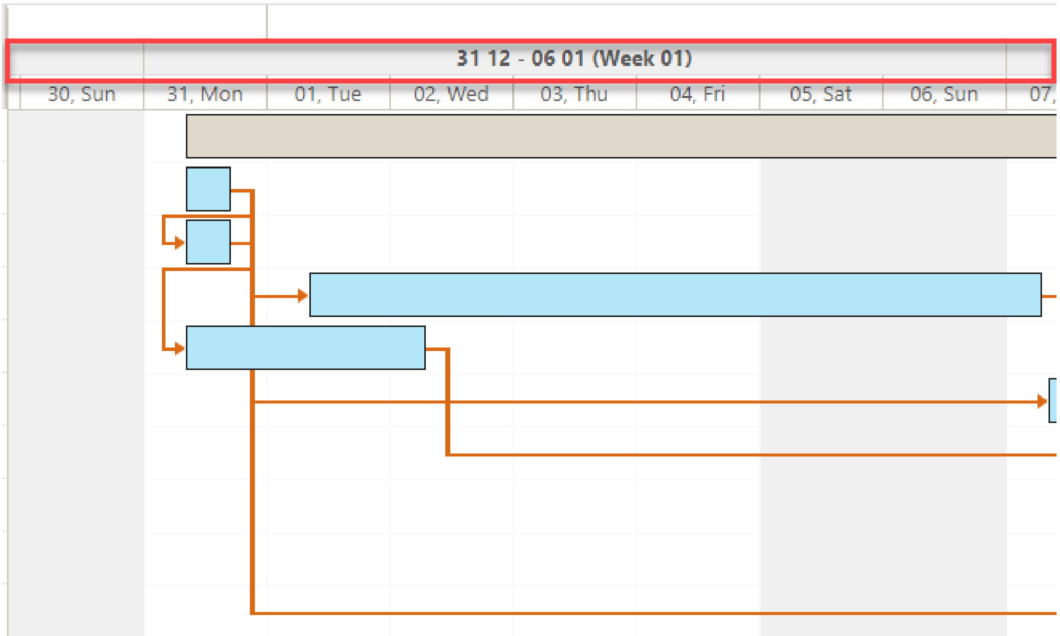


2. Choose a zoom level. You can zoom by **Days**, **Weeks**, **Months**, or **Years**.

3. (Optional) To return to the default zoom level or the level specified on the schedule overview, choose **Unit of Time Measure** as the zoom level.

Set zoom level using your mouse

1. Hover over the top area of the Gantt view.



2. Left-click to change the zoom level. Each time you click, the date range changes.

Expand and collapse schedules and schedule tasks

You can expand and collapse schedules and schedule tasks with child objects from the work area toolbar of the Gantt view. You can also perform this action directly in the chart by clicking the expand and collapse icon displayed next to schedules and tasks with nested objects.

Expand and collapse from the work area toolbar

When you use the work area toolbar to expand and collapse the selection, all levels are expanded or collapsed.

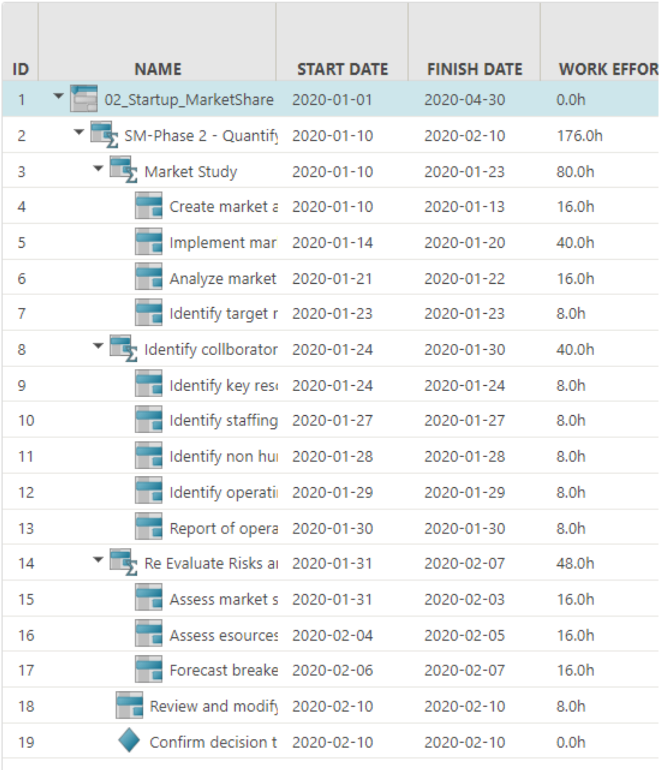
1. Select the schedule or schedule task you want to expand or collapse.

2. From the work area toolbar, click **Expand** and then choose one of the following:

   - **Expand Below.** Expand all levels of the selection.

   - **Collapse Below.** Collapse all levels of the selection.

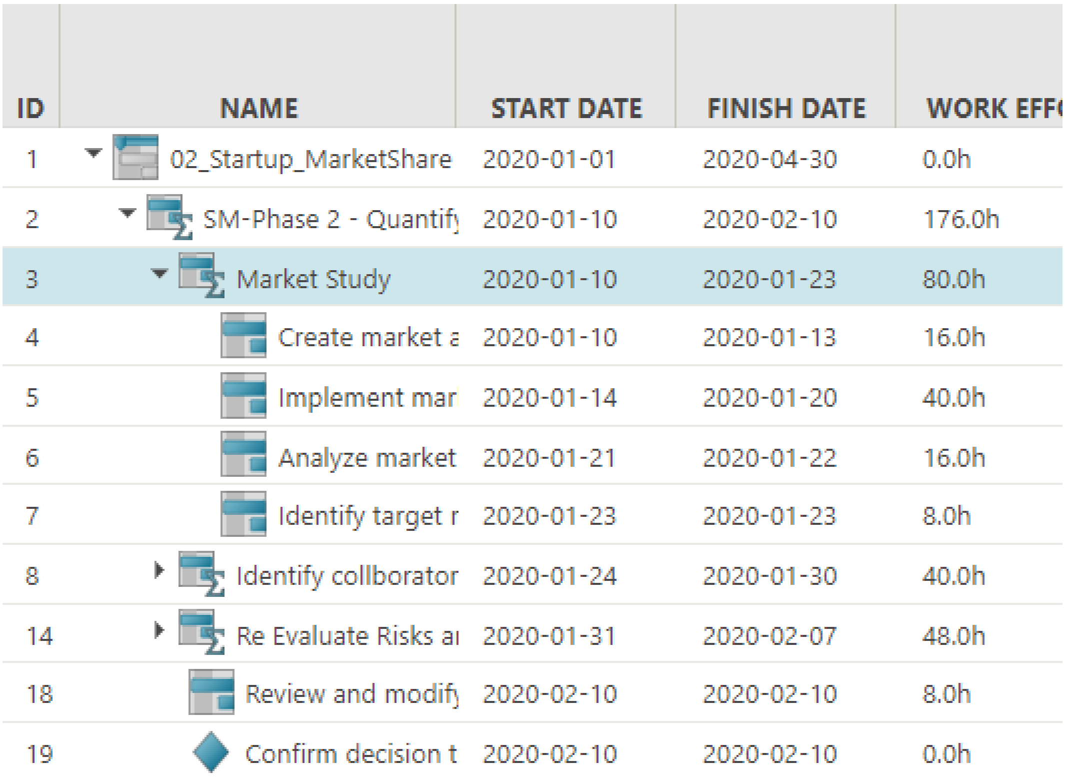
   All levels of the schedule and its nested objects are expanded or collapsed.



ID	NAME	START DATE	FINISH DATE	WORK EFFOR
1	02_Startup_MarketShare	2020-01-01	2020-04-30	0.0h
2	SM-Phase 2 - Quantify	2020-01-10	2020-02-10	176.0h
3	Market Study	2020-01-10	2020-01-23	80.0h
4	Create market a	2020-01-10	2020-01-13	16.0h
5	Implement mar	2020-01-14	2020-01-20	40.0h
6	Analyze market	2020-01-21	2020-01-22	16.0h
7	Identify target r	2020-01-23	2020-01-23	8.0h
8	Identify collborator	2020-01-24	2020-01-30	40.0h
9	Identify key res	2020-01-24	2020-01-24	8.0h
10	Identify staffing	2020-01-27	2020-01-27	8.0h
11	Identify non hu	2020-01-28	2020-01-28	8.0h
12	Identify operati	2020-01-29	2020-01-29	8.0h
13	Report of opera	2020-01-30	2020-01-30	8.0h
14	Re Evaluate Risks ar	2020-01-31	2020-02-07	48.0h
15	Assess market s	2020-01-31	2020-02-03	16.0h
16	Assess esources	2020-02-04	2020-02-05	16.0h
17	Forecast breake	2020-02-06	2020-02-07	16.0h
18	Review and modify	2020-02-10	2020-02-10	8.0h
19	Confirm decision t	2020-02-10	2020-02-10	0.0h

Expand and collapse from within the Gantt chart

You can click on the right arrow or down arrow next to a schedule or schedule task shown on the Gantt chart. This allows you to only expand or collapse that specific schedule or task. This method gives you more control over the Gantt view and lets you choose which items to expand or collapse.



ID	NAME	START DATE	FINISH DATE	WORK EFF(
1	02_Startup_MarketShare	2020-01-01	2020-04-30	0.0h
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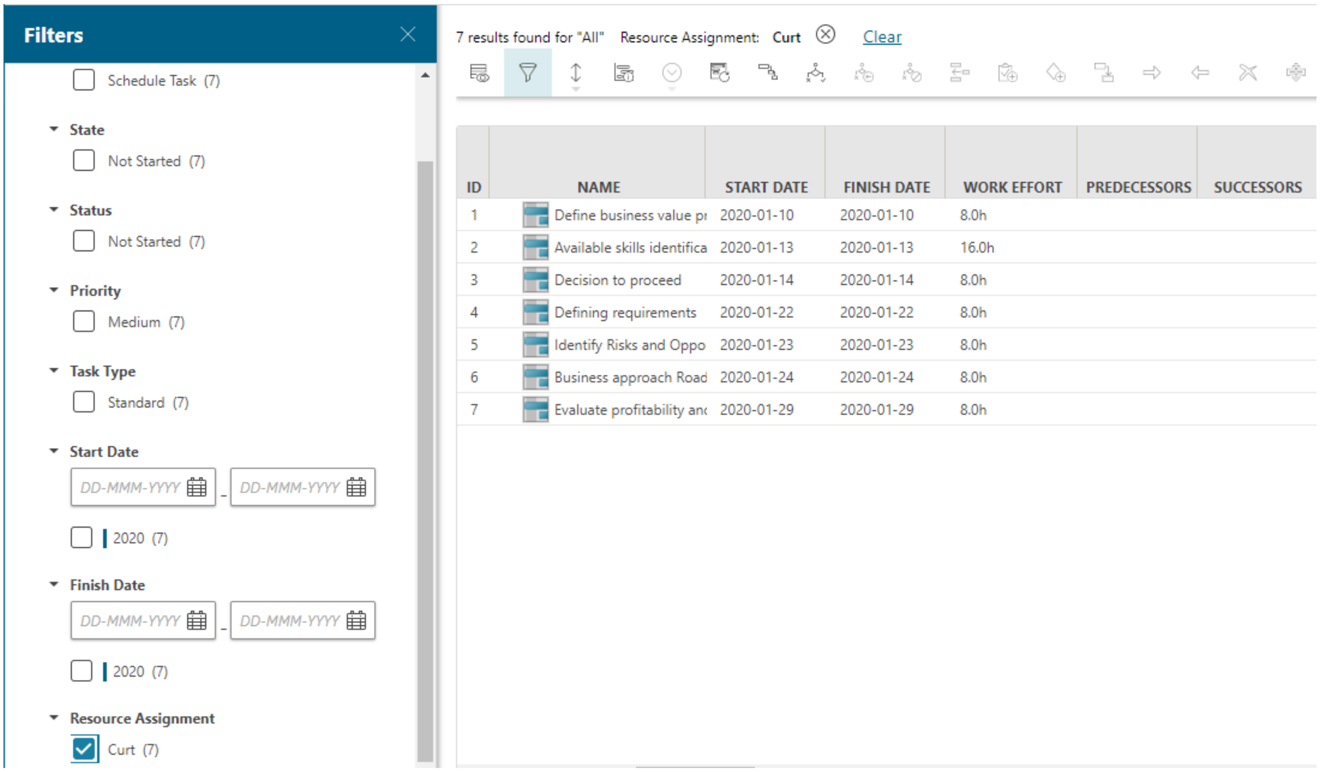
3	Market Study	2020-01-10	2020-01-23	80.0h
4	Create market a	2020-01-10	2020-01-13	16.0h
5	Implement mar	2020-01-14	2020-01-20	40.0h
6	Analyze market	2020-01-21	2020-01-22	16.0h
7	Identify target r	2020-01-23	2020-01-23	8.0h
8	Identify collborator	2020-01-24	2020-01-30	40.0h
14	Re Evaluate Risks ai	2020-01-31	2020-02-07	48.0h
18	Review and modify	2020-02-10	2020-02-10	8.0h
19	Confirm decision t	2020-02-10	2020-02-10	0.0h

Apply filters to the Gantt view

You can apply filters to a schedule from the Gantt view to personalize the view to your preferences or business process. For example, you can apply a **Resource Assignment** filter to view only tasks assigned to the selected resources. As you make choices in the **Filter** panel, the Gantt view gets dynamically updated to reflect your choices.



Note:

Your administrator can use the SM_Gantt_Filter_Properties site preference to define the properties that are displayed in the **Filter** panel.

1. From the work area toolbar, click **Search Filters**.

   The **Filters** panel opens.

2. Select the values you want to filter by. As you select the values, the Gantt view updates automatically. When you apply filters, the order of the tasks does not change.

3. To close the **Filters** panel, click the X in the panel or click **Search Filters** again.

Customize the Gantt view

You can customize the columns displayed in the Gantt view by hiding columns (except the **Name** column) or rearranging the column order.

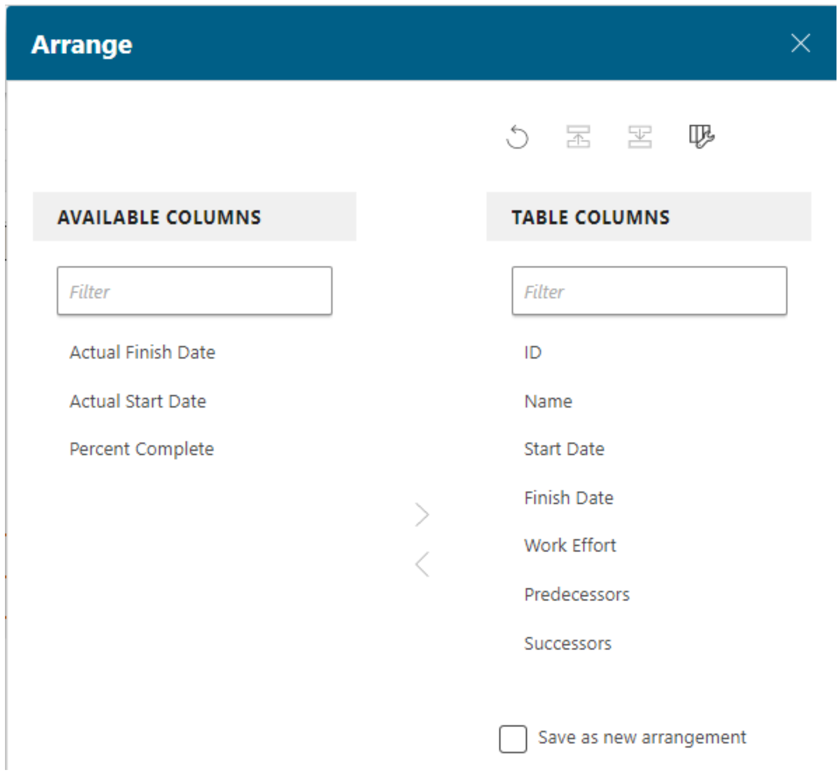
1. In the **Gantt** work area, click **Arrange**.

2. In the **Arrange** panel, do one of the following.

<table>
<tr><th>To</th><th>Do</th></tr>
<tr><td>Hide a column.</td><td>Select the column you want to hide from the Table Columns section of the panel and then click Remove < to hide it.

Note:

You cannot hide the Name column.



</td></tr>
<tr><td>Reset the columns to the default layout.</td><td>Click Reset ↻.</td></tr>
<tr><td>Save and load a column arrangement</td><td>When creating a custom arrangement, click the Save as new arrangement check box to enter a name for the view. When you click Save and Arrange to apply the view, the custom column configuration is saved. When you want to load it again, click Column Arrangements and then select the saved arrangement from the list.</td></tr>
<tr><td>Rearrange the column order.</td><td>a. Select a column name from the list.

b. Click either Move up or Move down.</td></tr>
</table>

3. Click **Arrange**.

SM_Gantt_Filter_Properties reference

The **SM_Gantt_Filter_Properties** preference defines the schedule task properties displayed in the **Filter** panel in the Gantt view. The defined property must be an attribute of schedule tasks or its subtypes. The order of the preference values determines the display order of properties in the **Filter** panel.

Valid values

Internal names of any single persistent attribute for the schedule task, excluding reference attributes, such as array, runtime, reference, relation, and compound properties.

Default values

The following are the default values for the filter property:

- **object_type**
- **fnd0state**
- **fnd0status**
- **priority**
- **task_type**
- **start_date**
- **finish_date**
- **ResourceAssignment**
- **schedule_deliverable_list**

> Note:
>
> **ResourceAssignment** and **schedule_deliverable_list** are special filter properties to display resources and schedule deliverables assigned to the schedule tasks.

6. Viewing your schedules and schedule tasks

View my schedules

As a schedule user, click **SCHEDULES** on the Active Workspace home page to display a list of all the schedules where you are the coordinator. You can use the drop-down list to also see schedules where you are a Participant or Observer.

> Note:
>
> You or your administrator can set a date range to determine how many schedules are displayed. This range is set using the **SM_Schedule_Tile_Day_Range** preference.

1. On the home page, click **SCHEDULES**.

2. (Optional) From the work area toolbar, you can perform the following actions from the **Schedules** list:

   - Change your view. You can choose to view a list, list with summary,table, table with summary, and images.

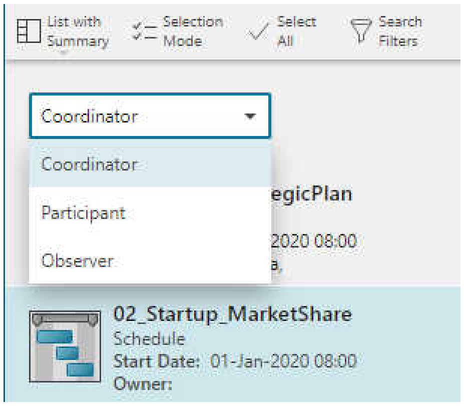
   - Enable multi-select mode.

   - Select all displayed objects.

   - Open the **Filters** panel to apply search filters to the list.

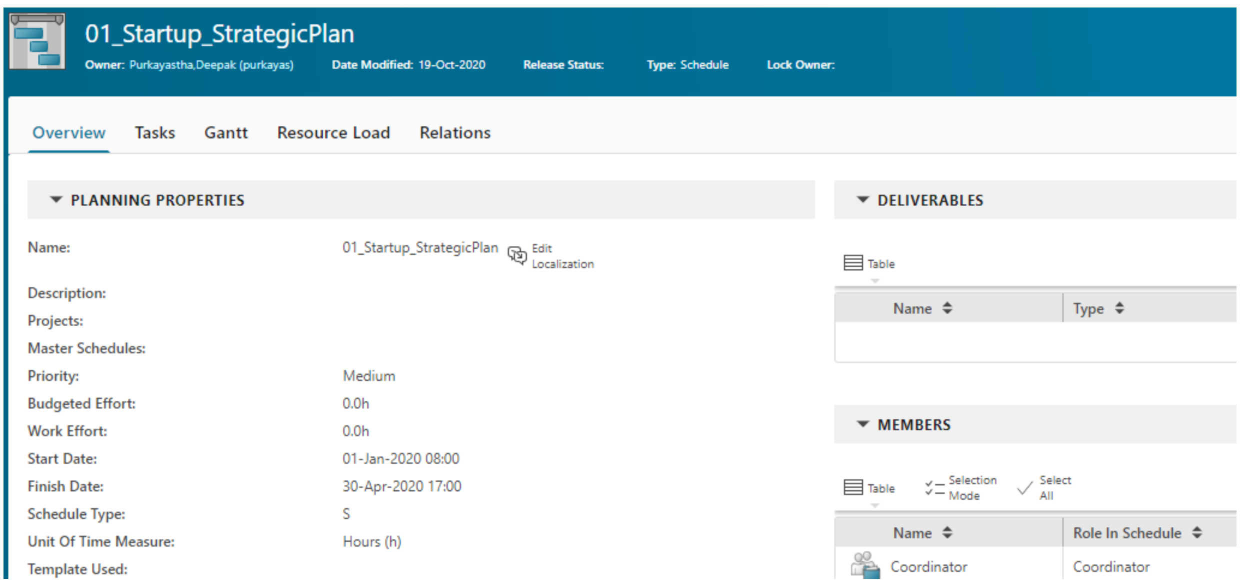
3. In the **Schedules** window, click each tab to view the list of schedules that fall within each of these groupings: **Not Started**, **In Progress**, **Late Start**, **Late Finish**, **Upcoming**, **Complete**, **Closed/ Aborted**, and **Team**.

4. (Optional) From the dropdown list in the upper left corner, select a role, such as **Coordinator**, **Participant**, or **Observer**, to filter the list of schedules by role.



5. To view a schedule, select the schedule from the list or click **Open**.

   The schedule's **Overview** tab displays the schedule's general properties, deliverables, members, and associated changes.



6. To see more attributes of the schedule, click the following tabs:

   - **Tasks** displays all tasks in this schedule.
   - **Gantt** displays schedule tasks in a graphical Gantt view.
   - **Resource Load** displays the users and their resource loads based on assigned schedule tasks.
   - **Relations** displays a graphical view of the schedule and its related items.

View a subschedule

A subschedule is a schedule that is inserted within a master schedule *as a schedule task*. Although inserted into the master schedule as a schedule task, the subschedule is a standalone schedule in its own right.

You can view a subschedule as a standalone schedule, or from within the master schedule.

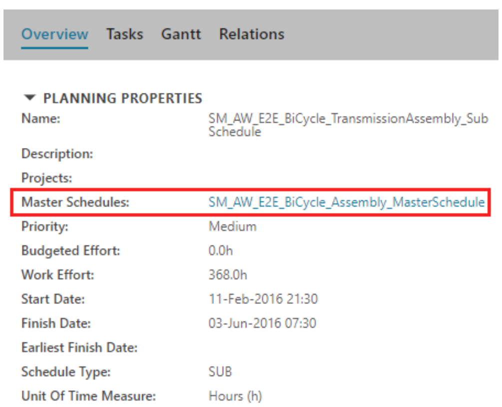
View a subschedule as a standalone schedule

1. Search for the subschedule using the search box, click **SCHEDULES** on your home page, or navigate to the subschedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired subschedule.

3. Click **Open**.

4. (Optional) To navigate to the subschedule's master schedule, click the **Master Schedule** field hyperlink.



View a subschedule from within the master schedule

1. Search for the master schedule using the search box, click **SCHEDULES** on your home page, or navigate to the master schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired master schedule.

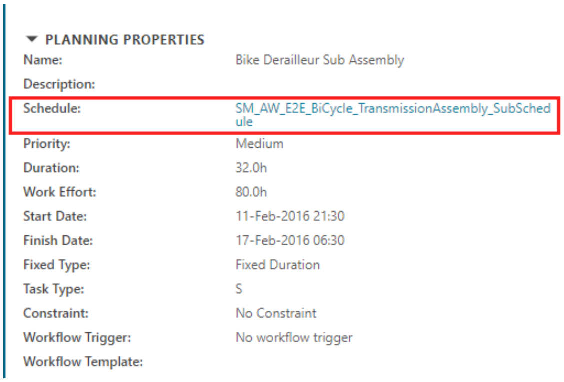
3. Click **Open**.

4. Click the **Tasks** tab.

   The subschedule is displayed, along with any master schedule and subschedule tasks. (Subschedule tasks roll up to the master schedule.)

5. (Optional) To view the subschedule task details, click **Open**.

   To navigate to the subschedule from within the subschedule task, click the **Schedule** field hyperlink under **Planning Properties**.



View my schedule tasks

Click **SCHEDULE TASKS** on the Active Workspace home page to display a list of all the tasks to which you are assigned as a user.

You can access a specific schedule task by searching for the specific schedule task name.

> Note:
>
> You or your administrator can set a date range to determine how many schedule tasks are displayed. This range is set using the **SM_ScheduleTask_Tile_Day_Range** preference.

1. On the home page, click **SCHEDULE TASKS**.

2. (Optional) From the work area toolbar, you can perform the following actions from the **Schedule Tasks** list:

   - Change your view. You can choose to view a list, list with summary,table, table with summary, and images.
   - Enable multi-select mode.
   - Select all displayed objects.
   - Open the **Filters** panel to apply search filters to the list.

3. In the **Schedule Tasks** window, click each tab to view the list of schedule tasks that fall within each of these groupings: **Not Started**, **In Progress**, **Late Start**, **Late Finish**, **Upcoming**, **Complete**, **Closed/Aborted**, and **Team**.

4. To view a schedule task's properties, select the schedule task from a list or click **Open**.

> Tip:
>
> To easily update a schedule task's properties while still maintaining a view of all the schedule tasks, with the schedule task selected, from the primary toolbar click **Edit** > **Start Edit** (or **Summary** or **Table**, depending on which view you are in).

View and claim schedule tasks assigned to my team

When you are subscribed to a resource pool, you can view the schedule tasks assigned to the pool and claim tasks to reassign them to yourself. Once you have claimed the task, you can then work it to completion.

> Note:
>
> Once you claim a schedule task from a resource pool, other members of your team that belong to the same resource pool are no longer able to see or claim the task. It now only appears in your tasks list based on its status. For example, if the task is in progress when claimed, it appears in your **In Progress** task list.

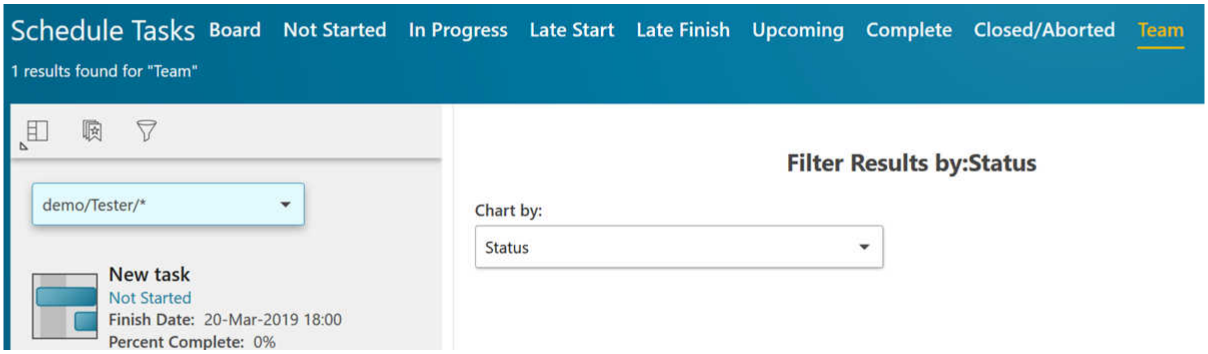
Keep the following in mind when viewing and claiming schedule tasks assigned to a resource pool:

- You must first **subscribe to the resource pool** to be able to see the schedule tasks assigned to it. If you do not see a task you are looking for, verify that you have subscribed to the correct resource pool.
- If a schedule task is assigned to all team members, it does not appear in the resource pool task list and cannot be claimed.
- When the schedule coordinator assigns a resource pool to the task, the pool is automatically added as a member of the schedule.
- If the schedule task is in a workflow process when claimed, there are no impacts to the workflow assignments.

1. On the home page, click **SCHEDULE TASKS**.

2. In the **Schedule Tasks** window, click the **Team** tab.

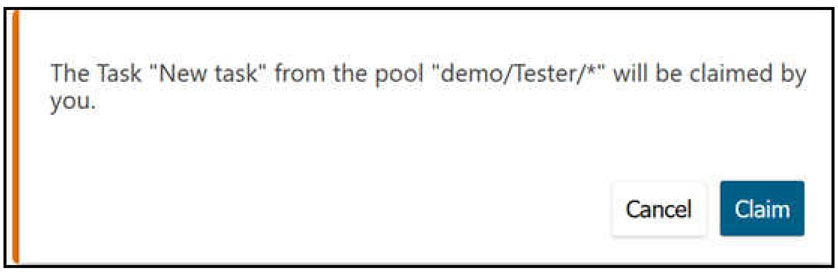
   All tasks assigned to your team are listed.



3. (Optional) If you are subscribed to many resource pools, you can filter the list of schedule tasks by the specific resource pool.

4. Select the task you want to claim and then click **Manage** **Claim Task**.

5. Click **Claim** on the dialog box to verify that you want to claim the task from the resource pool.

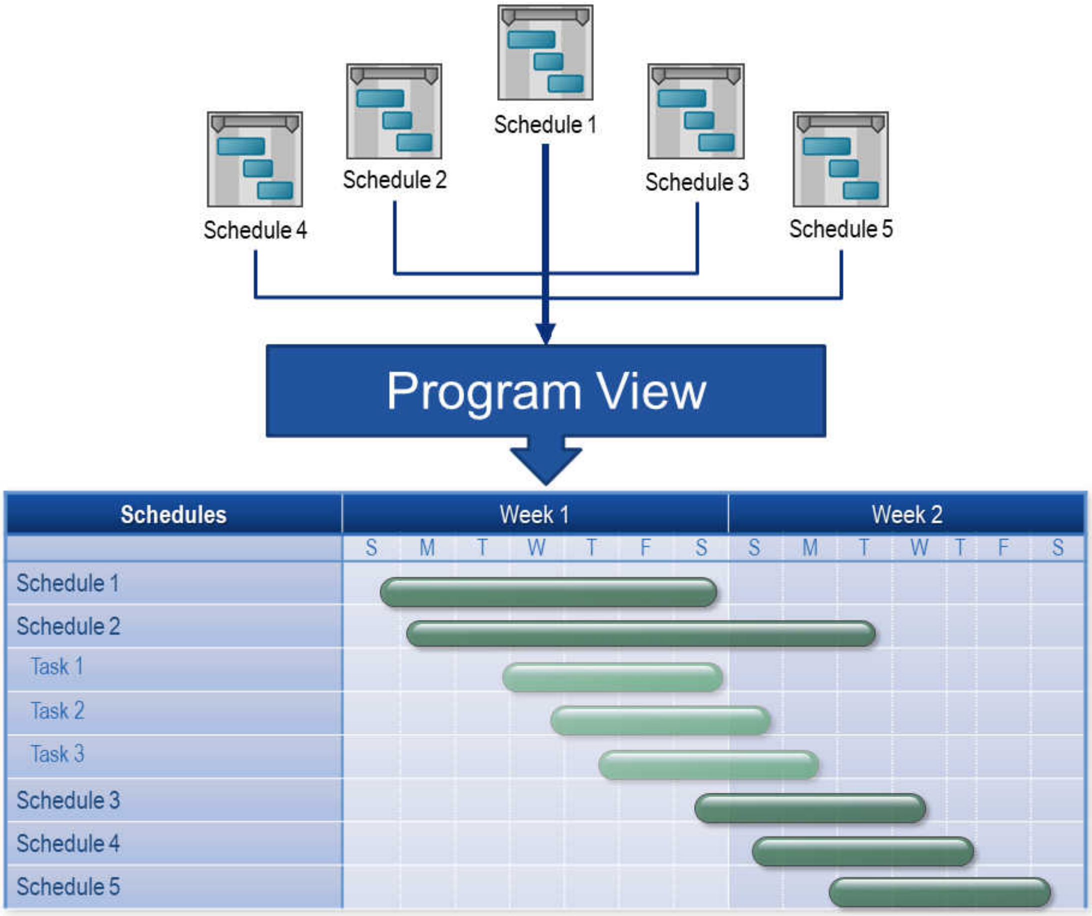


The schedule task is reassigned to you.

Creating Program Views

About Program Views

Program Views allow you to create a customized Gantt chart that contains multiple schedules and their associated schedule tasks. You can then view and manage the schedules you add to the Program View from a single location. This provides you with a better idea of how all the schedules relate to the overall program.



If you need to make changes to a schedule or schedule task, you can select it from the program view and then open it to make the necessary changes. You can also perform the following actions when using Program Views:

- **Create a new Program View.**
- **Arrange how the Program View information is displayed.**
- **Edit an existing Program View to add or remove schedules.**
- **Filter the data shown in a Program View by creating and applying filters.**

Create a new Program View

You can create a new Program View and add any existing schedules to the view. This allows you to view all the added schedules and their associated tasks from a single Gantt chart view.

1. On the home page, click **SCHEDULES**.

2. Click the **Program Views** tab.

3. From the primary toolbar, click **New** > **Create Program View**.

   The **Create Program View** panel opens.

4. Do the following:

   - Enter a **Name** and **Description** for the Program View.

   - In the **Schedules** section of the panel, click **Add** ⊕ to view the list of available schedules. Select the schedules you want to add to the Program View and then click **Add**.

     > Tip:
     >
     > You can select multiple schedules by holding the **Ctrl** key as you select them.

   - (Optional) To filter the list of available schedules, enter the name of a schedule in the **Filter** box.

   - Select the **Open On Create** checkbox to open the new Program View as soon as it is created.

5. Click **Create**

   The new Program View is added to your **My Program Views** list. Other users with appropriate permissions can also see this new Program View in the **All Program Views** list.

> Note:
>
> If you need to change the name or description for the Program View, click **Information** ⓘ in the primary toolbar and update the fields as needed.

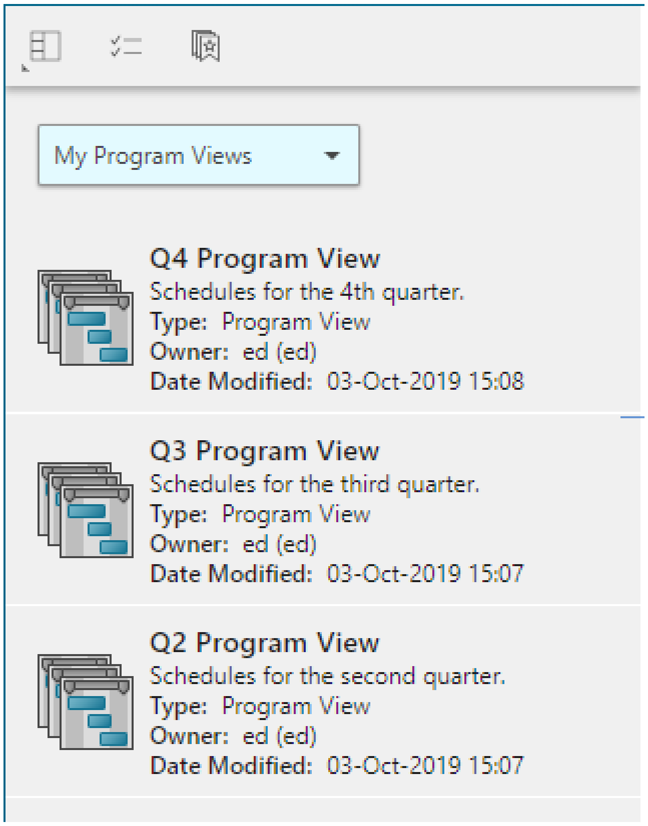
View a Program View

You can view your Program Views from the **Program Views** tab of the schedule list. You can choose to view only the Program Views you have created, or if you have the appropriate permissions, the Program Views created by other users in your organization.

1. On the home page, click **SCHEDULES**.

2. Click the **Program Views** tab.

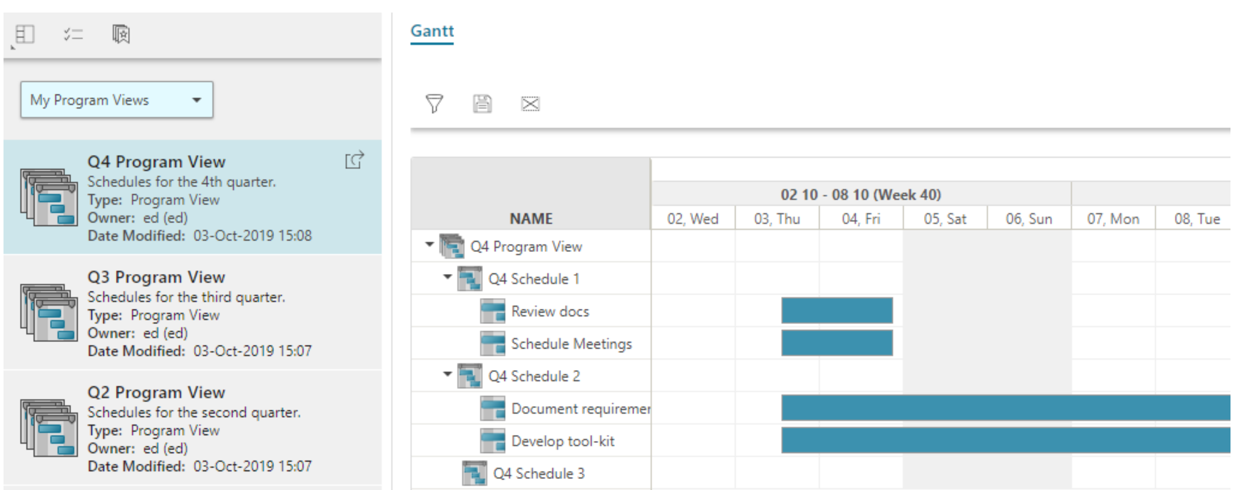
   The default view is **My Program Views**, which displays only the Program Views you have created.



3. (Optional) To view a list of all the Program Views created by other users in your organization that you have permission to see, click the drop-down list and select **All Program Views**.

4. Select a Program View from the list.

   A Gantt chart for the Program View opens to the right and shows all the schedules added to the view.



5. Do any of the following:

- Click the expand arrow to view the schedule tasks for a schedule. You can click it again to collapse the view.
- Click **Filters** to create a new filter and apply it to your Program View.
- Click **Change Schedules** to add or remove schedules.
- Click **Arrange** to choose how to display the information in the Program View based on schedule and schedule task fields such as **Start Date** and **Priority**.
- Click **Information** in the primary toolbar to view or change the name or description for the Program View.
- Select a Program View and then click **Edit** > **Delete** to delete it from your list of Program Views.

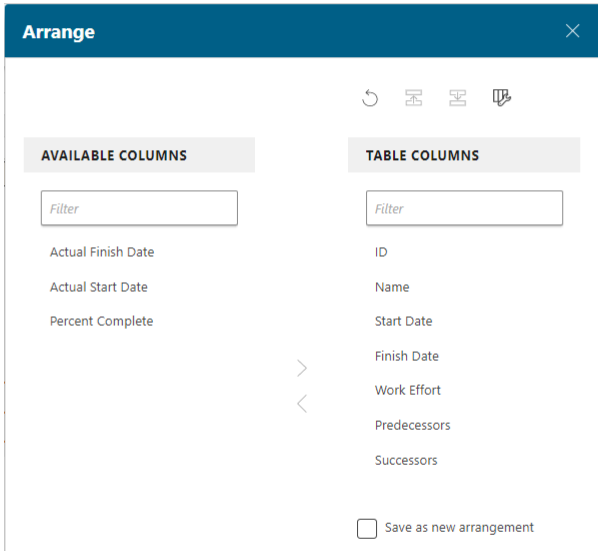
Arrange how Program View information appears

You can arrange how the schedule information is displayed for a Program View. For example, you can choose to arrange the data by the task start date, priority, or status. When you apply the filter, the Gantt chart refreshes to show the data in your desired order.

> Note:
>
> See Arranging the order of columns in Active Workspace Fundamentals for more information on the **Arrange** panel and its features.

1. Open a Program View.
2. Click **Arrange** to display the **Arrange** panel.
3. In the **Arrange** panel, do one of the following.

To	Do
Hide a column	Select the column you want to hide from the **Table Columns** section of the panel and then click **Remove** to hide it. Note: You cannot hide the **Name** column.

To	Do
	
Reset the columns to the default layout	Click **Reset**.
Save and load a column arrangement	When creating a custom arrangement, click the **Save as new arrangement** check box to enter a name for the view. When you click **Save and Arrange** to apply the view, the custom column configuration is saved. When you want to load it again, click **Column Arrangements** and then select the saved arrangement from the list.
Rearrange the column order	a. Select a column name from the list. b. Click either **Move up** or **Move down**.

4. Click **Arrange**.

Edit an existing Program View

You can edit an existing Program View to add new schedules or remove any existing ones. This allows you to keep your Program View current as schedules are completed, changed, or deleted.

1. Open a Program View.

2. Click **Change Schedules**.

   The **Change Schedules** panel opens and displays a list of the schedules included in the view.

To add a new schedule

1. Click **Add** ⊕, select the schedule from the list or enter the schedule name in the **Filter** box, and then click **Add**.

   The selected schedule is added to your Program View.

2. Click **Change** to close the **Change Schedules** panel and update the Program View.

To remove a schedule

1. Select the schedule you want to remove from the list of schedules in the Program View, and then click **Remove** ⊖ to remove it from the list.

2. Click **Change** to close the **Change Schedules** panel and update the Program View.

Apply filters to Program Views

You can create customized filters and apply them to your Program Views. Filters help you reduce the amount of information displayed and allow you to focus on only the data you need to see. This is especially helpful when you have a Program View with a large number of schedules and schedule tasks.

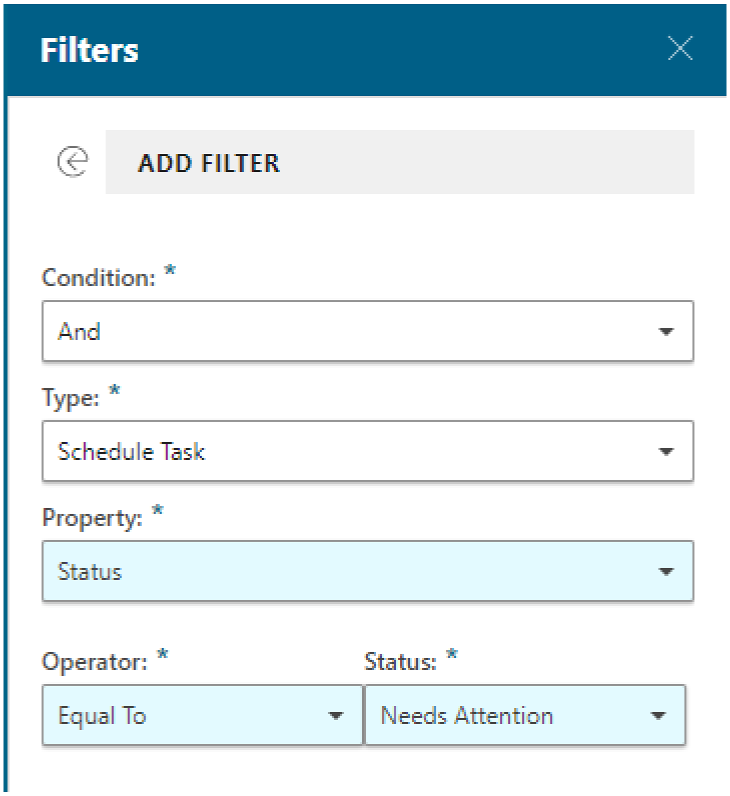
You can also **edit an existing filter** to change the properties, **delete a filter** when it is no longer needed, and **filter your Program View by resource assignments**.

> Note:
>
> Filtering based on custom tasks is currently not supported.

1. **Open a Program View.**

2. Click **Filters** to open the **Filter** panel.

3. Click **Add** ⊕.



4. Choose the **Type** of filter. You can select **Schedule** or **Schedule Task**.

5. If you selected the **Schedule** filter type, do the following:

   - Select the **Condition** for the new filter. You can select **And** or **Or** as the condition. The **And** condition narrows the filter results because it requires the specified property value to be included with other filter values using the **And** condition. The **Or** condition returns broader results because the specified property does not have to be included with the other filter values.

   - Select the schedule **Property** that you want to filter on, such as **Name**.

   - Select an **Operator**, such as **Equal To** or **Not Equal To**.

   - Enter the schedule **Name** you want to filter by.

6. If you selected the **Schedule Task** filter type, do the following:

   - Select the **Condition** for the new filter. You can select **And** or **Or** as the condition. The **And** condition narrows the filter results because it requires the specified property value to be included with other filter values using the **And** condition. The **Or** condition returns broader results because the specified property does not have to be included with the other filter values.

   - Select the schedule task **Property** from the list that you want to filter on, such as work completed percent, actual start date, or description.

- Select an **Operator** from the list for the chosen property. The operator changes depending on the property you select. For example, when choosing the actual finish date property, you can choose from multiple operators, such as equal to, less than or between, as well as selecting the finish date from a calendar. However, if you select the description property, you can only choose equal to or not equal to as the operator because you are filtering on a text field.

- Enter the required operator information. This may be selected from a drop-down list, entered into a text field, or selected from a calendar, depending on the type of property you selected.

7. Click **Add**.

   The new filter is added to your **Filters** list.

8. Select the filter you want to apply from the **Filters** panel, and then click **Apply**.

   The Gantt chart for the Program View refreshes to only show the schedule data matching your applied filters. This new view is also automatically saved when the filter is applied.

Filter by resource assignment

1. Select **Resource Assignment** as the filter **Property** for a **Schedule Task** filter.

2. Choose an **Operator** of **Equal To** or **Not Equal To**.

3. Click **Add** to view a list of users, resource pools, or disciplines.

   You can enter a user's name into the **Filter** box to quickly search for a specific user.

4. Select the user from the list and then click **Add** ⊕.

   The user is added as a resource for the filter.

5. Click **Save** to save the filter.

Edit an existing filter

1. Click **Filters** to open the **Filter** panel.

2. Select a filter from the list and then click **Edit**.

   The filter properties display.

3. Edit the filter properties as needed and then click **Save**.

Delete a filter

1. Click **Filters** to open the **Filter** panel.

2. Select a filter from the list and then click **Delete** to remove it.

Delete a Program View

You can delete a Program View when you no longer need it.

1. Open a Program View.

2. Select the Program View you want to delete from the list of views.

3. Click **Edit** > **Delete** to delete it from your list of Program Views.

7. Using the Board view to manage schedule tasks

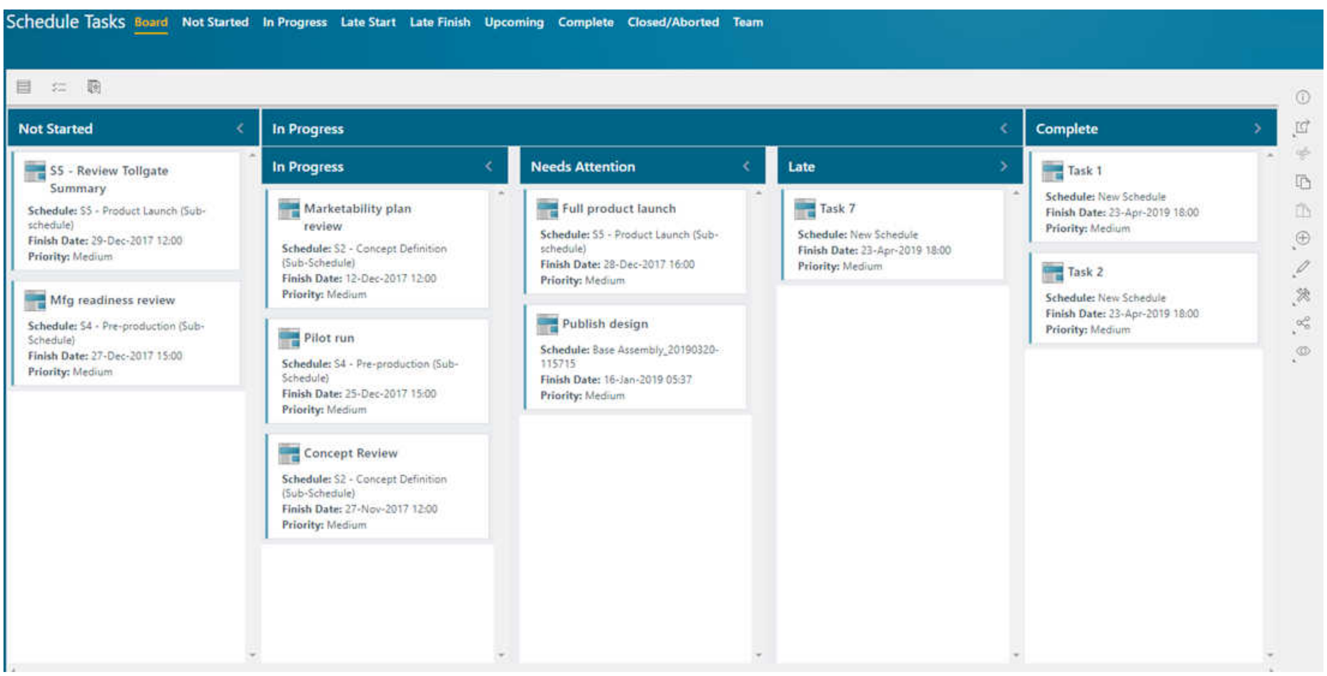
About the Board view

The **Board** is an interactive view that allows you to **quickly prioritize and manage all your assigned schedule tasks** for all the schedules in which you are a participant. You can drag and drop tasks from **Not Started** to other status columns, such as **In Progress**, **Needs Attention**, **Late**, and **Complete.**

> Note:
>
> The task statuses are set by your administrator and may differ from those described in this documentation.

The order in which the tasks are listed in the view is based on different factors depending on which column they are in.

- **Not Started:** Tasks are listed in order of priority, start date (earliest to latest), and then work estimate.
- **In Progress:** Tasks are listed in order of priority, finish date (earliest to latest), and then work estimate.
- **Complete:** Tasks are listed in order of actual completion date.



Each task card on the **Board** displays some task information, such as the name of the task, the related schedule, the finish date, and the priority. You can view more task details by selecting a task card, and then clicking the **Information** from the primary toolbar. This opens the **Information** panel. You can then click through the different tabs at the top of the panel to view more information on the selected task.

You can also perform the following actions from the **Board** view:

- **Assign a task deliverable.**
- **Limit the number of tasks displayed per column on the board.**
- **Edit the task properties from the Information panel.**
- **Submit a timesheet entry.**
- Open the task from the **Board** view by selecting the task and then clicking **Open** from the **primary toolbar**.

Modify the Board view

You can modify the default **Board** view by collapsing or expanding columns as needed. As you expand or collapse the columns, the board automatically shifts and sizes the remaining expanded columns.

- **Collapse a column:** Click on the column header, such as **Not Started** or **Complete** to collapse the column.
- **Expand a column:** Click on the collapsed column to expand it back to its normal size.

> Note:
>
> If you modify the **Board** view and then navigate to a different area in Active Workspace, when you return to the **Board** view, all the modifications are lost and you see the default view with all columns expanded.

Limit the number of tasks displayed in the Board view

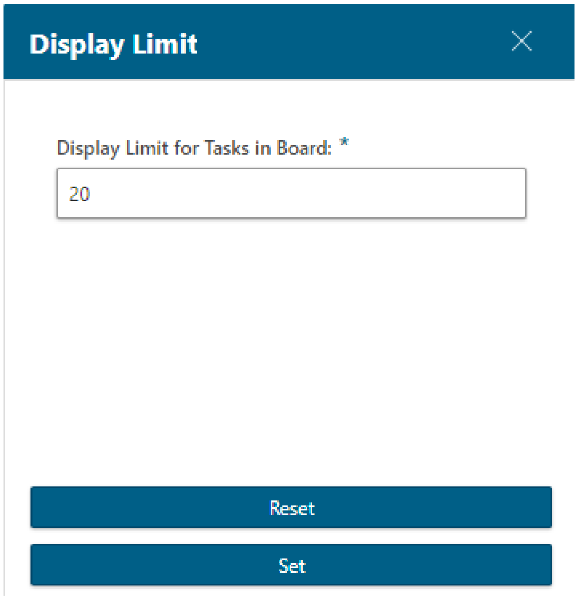
You can set a limit for the number of tasks displayed per column in the **Board** view. The minimum amount of tasks that can be displayed is 1.

1. On the home page, click **SCHEDULE TASKS**.

   The **Schedule Tasks** window opens with the **Board** view automatically selected.

2. From the **primary toolbar**, click **View** > **Display Limit**.

   The **Display Limit** panel opens.



3. In the **Display Limit for Tasks in Board** box, enter the number of tasks you want to display.

4. Click **Set**.

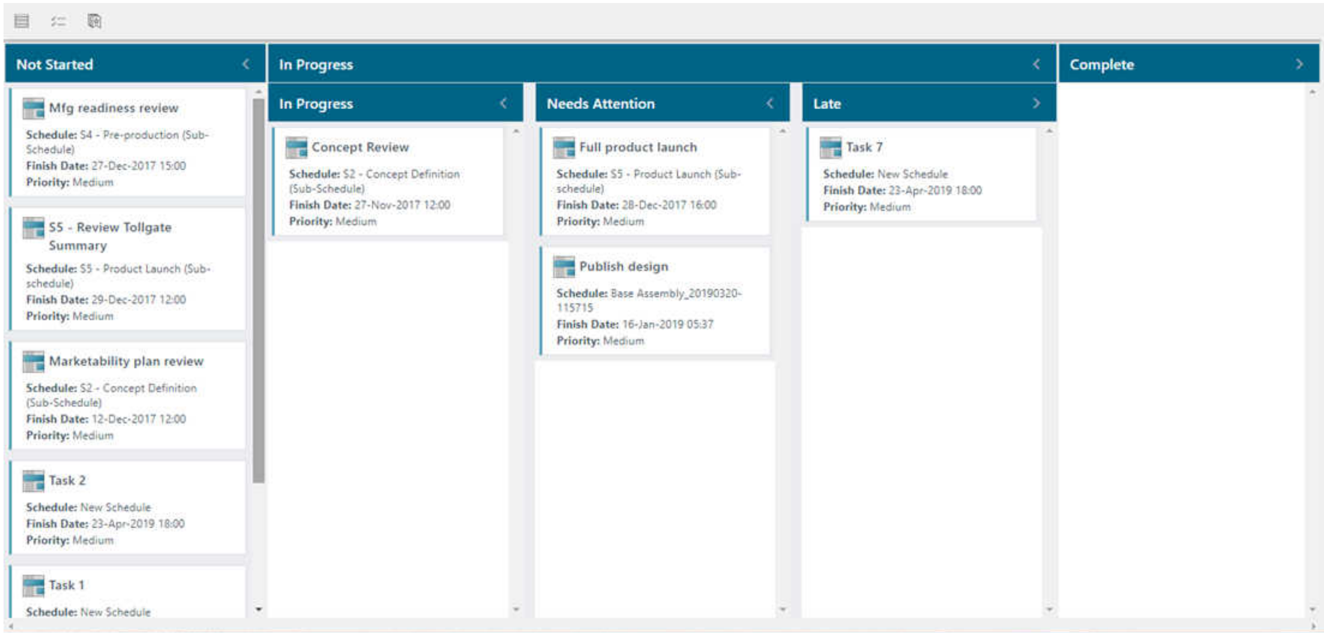
   The board refreshes and only displays the number of tasks specified. Active Workspace determines which tasks are displayed based on the priority, start and finish dates, and work estimates.

> Tip:
>
> If you want to reset the **Board** to the default number of tasks displayed per column, click **View** > **Display Limit** and then click **Reset**.

Manage tasks in the Board view

You can manage your tasks in the **Board** view by clicking a task, and then dragging it to the desired status column. As you move the tasks to different columns on the board, Active Workspace automatically updates the task status.

> Note:
>
> Dragging items on the board is currently not supported in Internet Explorer. It is supported in Google Chrome, Mozilla Firefox, and Microsoft Edge.



Tip:

To select more than one task at a time, hold the **Ctrl** key as you click the tasks on the board.

1. On the home page, click **SCHEDULE TASKS**.

   The **Schedule Tasks** window opens with the **Board** view automatically selected.

2. Click a task card in a status column, such as **Not Started**, to select it. A selected task card is highlighted in blue.

3. Drag the selected task card to a different status column, such as **In Progress**.

   The task is now listed in the destination column.

Continue to drag your tasks across the different status columns to manage your work.

Assign task deliverable from the Board view

You can assign a task deliverable from the **Board** view. This allows you to quickly manage the deliverables for all your schedule tasks from one view.

1. On the home page, click **SCHEDULE TASKS**.

   The **Schedule Tasks** window opens with the **Board** view automatically selected.

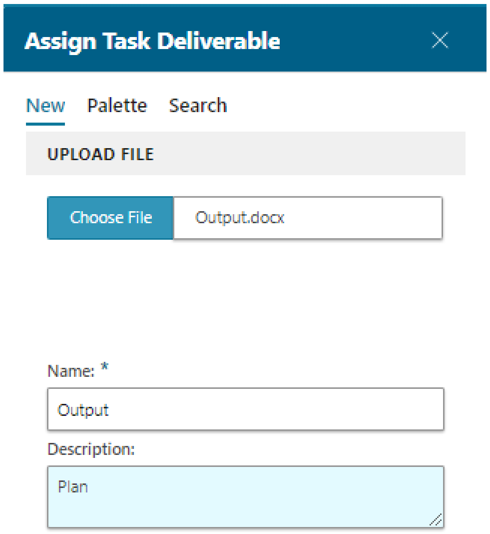
2. Click the task you want to assign the new deliverable to.

3. From the **primary toolbar**, click **Manage** > **Assign task deliverable**.

4. On the **Assign Task Deliverable** panel, do one of the following.

To	Do
Search for an existing deliverable.	a. Click the **Search** tab. b. Enter the search criteria and click . c. Select a deliverable from the returned list.
Select a deliverable that was previously copied to the paste buffer using **Copy** .	a. Click the **Palette** tab. b. Select a deliverable from the **Clipboard** section.
Select a favorite or recently viewed deliverable.	a. Click the **Palette** tab. b. Select a deliverable from the **Favorites** or **Recent** section. c. Enter the properties for the new deliverable. The properties vary depending on the type of deliverable being created.
Add a new deliverable and assign the deliverable instance to the deliverable, for example, a PDF file or Word document.	a. Click the **New** tab. b. Click **Choose File** to find and associate a deliverable instance with the new deliverable you are creating. c. Enter the properties for the new deliverable. The properties vary depending on the type of deliverable being created.

5. Click **Assign**.



The deliverable is assigned to the task and appears in the **DELIVERABLES** section of the task properties.

View and edit task properties from the Board view

You can select a task from the **Board** view and then open the **Information** panel to view additional details about the selected task. You can also edit the details directly from the panel if necessary.

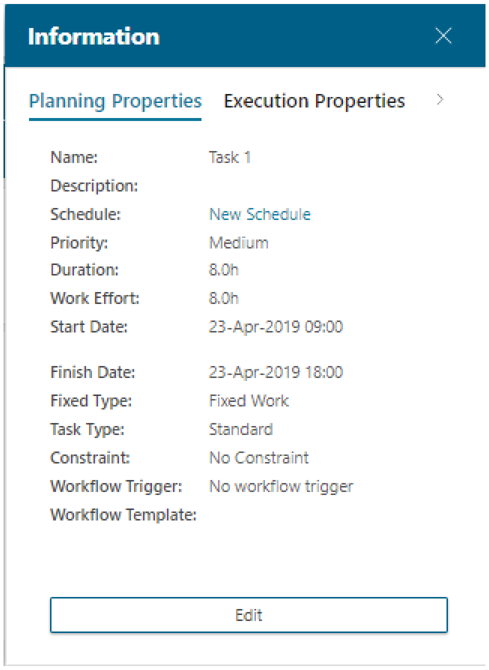
1. On the home page, click **SCHEDULE TASKS**.

   The **Schedule Tasks** window opens with the **Board** view automatically selected.

2. Click a task card on the board to select it.

3. From the **primary toolbar**, click **Information** ⓘ.

   The **Information** panel opens.



4. Click the tabs across the top of the panel to view additional details about the schedule task.

5. (Optional). Click the schedule name hyperlink if you want to open the schedule associated with the task.

6. (Optional). Click **Edit** to change the task properties directly from the **Information** panel. When you are finished, click **Save** to update the task.

When you finish viewing or editing the task properties, close the **Information** panel to return to the **Board** view.

Submit timesheet from the Board view

You can record the work you completed against the task by creating a timesheet entry. You can create and save multiple entries against a task before you submit the entries for approval, or you can submit the entries for approval as they are created.

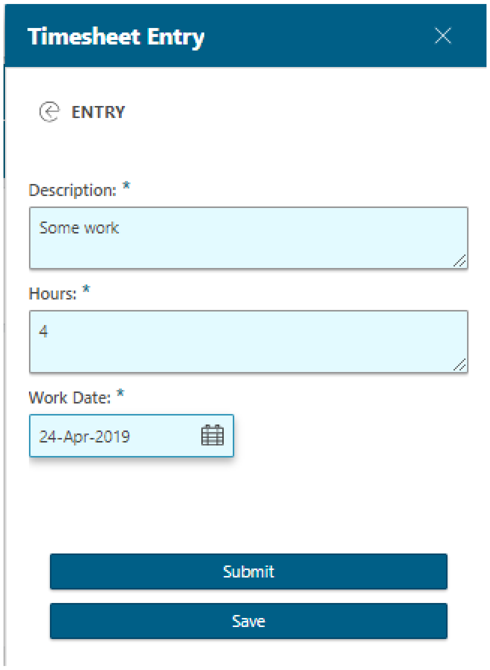
1. On the home page, click **SCHEDULE TASKS**.

   The **Schedule Tasks** window opens with the **Board** view automatically selected.

2. Select a task card and then click **New** > **Timesheet Entry**.

   The **Timesheet Entry** panel opens.

3. Enter the timesheet details, including the **Description**, **Hours**, and **Work Date**.



4. Do one of the following:

   - Click **Submit** to submit the entry for approval. Submitted entries cannot be edited.

   - Click **Save** to save the entry but not submit it for approval. Saved entries can be edited, if necessary, and submitted for approval later.

When you have finished submitting your timesheet for the task, close the **Timesheet Entry** panel to return to the **Board** view.

8. Creating and managing schedules and schedule templates

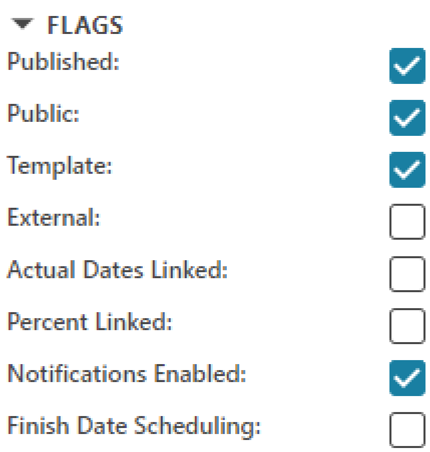
Create a schedule template

As a schedule coordinator, you can create a schedule template to support specific projects that have predefined tasks. Schedule templates are not displayed when you access the Schedule location from the **SCHEDULES** tile on the home page. However, you can manually search for a schedule template.

1. Create a schedule using one of the described methods (ad hoc, from an existing schedule, or from an existing template).

2. Open the new schedule and click **Edit** > **Start Edit**.

3. On the **Overview** tab, in the **Flags** section, select the **Template** checkbox.



4. Click **Edit** > **Save Edits** to save as a schedule template.

Creating schedules

Create a schedule from a schedule template

As a schedule coordinator, use a schedule template to simplify the task of creating new schedules. A schedule template is a predefined schedule of tasks that has been established for a specific project type. Your organization may provide one or more schedule templates for you to use to create a new schedule.

When you create a schedule from a template, the new schedule takes the shift date from the template. You can change this date if necessary as you enter the details for the new schedule.

> Note:
>
> If the template you select contains both active and inactive members, only the active members in the schedule template are added to the schedule created from the template. Inactive members are removed from all schedule objects configured in the template, such as task assignments, workflow ownerships, privileged user settings, and schedule memberships.

You can also create an ad hoc schedule (one that is not based on a schedule template or an existing schedule), or you can create a schedule from an existing schedule.

> Note:
>
> When you create a schedule, you are added to that schedule as the schedule coordinator.

1. Click **SCHEDULES** on your home page.

2. On the Schedules location, click **New** > **Create Schedule from Template**.

   The **Create Schedule From Template** panel opens.

3. (Optional) Filter the list of schedule templates by the **Owning Group** or **Owning User**. You can also enter the user's name in the **Filter** box if you know which user you want to filter by.

4. Select the desired template and do the following to create the schedule from the template.

   If necessary, you can view the selected schedule template in a new browser tab by selecting it and then clicking **Open in New Tab**.

   - In the **Name** box, enter the new schedule's name.

   - (Optional) In the **Shift Date** boxes, select a new date and time when this schedule becomes effective. The shift date specified in the schedule template is set as the default date.
     Teamcenter Dispatcher Server must be installed to complete this task. Your system administrator can find information about configuring asynchronous services in *Installing and Configuring Dispatcher* in the Teamcenter help.

   - (Optional) Select the **Template** check box to make this new schedule a schedule template.

   - (Optional) To run this process in the background, select **Run in Background**. This option is useful if the schedule template you selected is large.
     Teamcenter Dispatcher Server must be installed to complete this task. Your system administrator can find information about configuring asynchronous services in *Installing and Configuring Dispatcher* in the Teamcenter help.

   - (Optional) To have the new schedule open after it is created, select **Open On Create**.
     This option is not displayed if **Run in Background** is selected.

5. Click **Create**.

Create a new schedule from an existing schedule

As a schedule coordinator, use this procedure to create a new schedule that contains the same tasks and **Planning Properties** values (except **Name** and **Description**) as an existing schedule. This is useful if you create schedules for multiple projects that have similar tasks.

You can also create an ad hoc schedule (one that is not based on a schedule template or an existing schedule), or you can create a schedule from a schedule template.

> Note:
>
> When you create a schedule, you are added to that schedule as the schedule coordinator.

1. Navigate to and select the schedule from which you want to create the new schedule.

2. From the primary toolbar, click **New** > **Save As**.

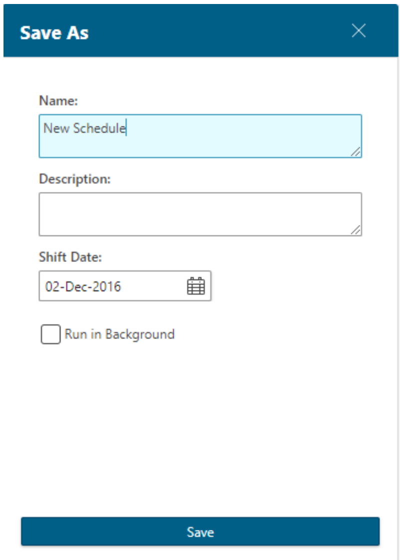
   You can create a new schedule from any tab within an existing schedule.

3. In the **Save As** panel, do the following.

   - In the **Name** box, enter the new schedule's name.

   - (Optional) In the **Shift Date** boxes, select a new date and time that this schedule becomes effective.

   - (Optional) To run this process in the background, select **Run in Background**. This option is useful if the schedule template you selected is large.



4. Click **Save**.

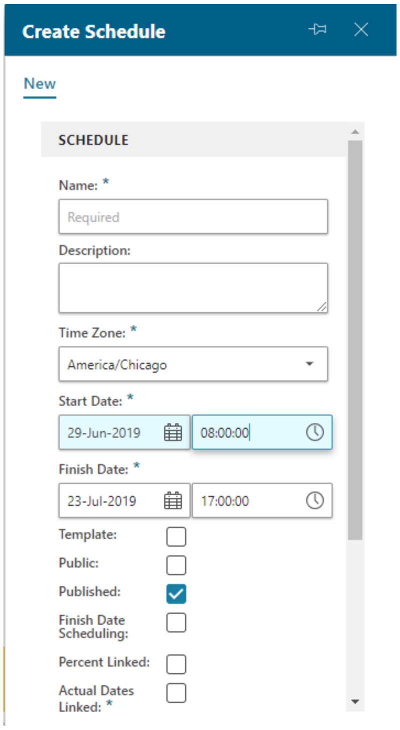
   The new schedule is placed in your **Newstuff** folder.

Create an ad hoc schedule

As a schedule coordinator, you may want to create a schedule that is not based on a schedule template or an existing schedule. Use this process to create an entirely new schedule.

> Note:
>
> When you create a schedule, you are added to that schedule as the schedule coordinator.

1. From the home page, click **SCHEDULES**.
2. On the Schedules location, click **New** > **Create Schedule**.



3. In the **Create Schedule** panel, enter the schedule properties values. These property values are discussed in the Field definitions for schedule task execution properties and the Field definitions for schedule planning and execution properties, flags, and stakeholder fields topics.

   If you are not ready for other users to see or access this schedule, clear the **Published** check box if it is selected. When you are ready for others to access this schedule, modify the schedule properties to change this value.

   > Tip:
   >
   > If you want to add multiple schedules with the same or similar values, click **Pin Panel** to keep the **Create Schedule** panel open as you create the schedules.

4. (Optional) Click **Projects** to add this schedule to a Teamcenter security-level project. The project consists of entities that correlate groups of users with the data associated with a given project or subset of a project. Project-level security is defined by your system administrator.

   You may need to scroll down to see the project fields.

   Adding a schedule to a project allows you to constrain your schedule membership to resources found in the project, if desired.

5. Click **Create**.

   The new schedule is placed in your **Newstuff** folder.

Structuring subschedules

Insert a subschedule into a schedule

As a schedule coordinator, you can insert a subschedule into another schedule, which then becomes the master schedule. You can insert a subschedule using either the master schedule's **Task** tab or the **Gantt** tab—whichever view you prefer.

> Note:
>
> If you or your system administrator has enabled the **SM_AUTO_EXTEND_SCHEDULE_MASTER_DATE** preference, and you insert a subschedule that is outside the **Start Date** and **Finish Date** boundaries of the master schedule, the master schedule's dates automatically expand to accommodate the subschedule. If this preference is not enabled, and the subschedule's boundary dates are outside the master schedule's boundaries, the subschedule is not inserted.

The following restrictions apply:

- The subschedule must be set to **Published**.
- Subschedules are supported only one-level deep on the master schedule, which means you can't insert a subschedule into another subschedule from the **Task** or **Gantt** tab within the top master schedule. You can, however, navigate to the **Task** or **Gantt** tab within a subschedule and insert a (sub) subschedule in that manner. The subschedule then becomes the master schedule for the (sub) subschedule.

> Note:
>
> The following steps also apply to inserting a subschedule template into a master schedule template.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.
2. (Optional) Filter the returned list to quickly find the desired schedule.
3. Select the desired schedule (to be the master schedule) and click **Open** .
4. Click either the **Tasks** tab or the **Gantt** tab, depending on the view that you prefer.
5. Do one of the following to ensure that the subschedule is inserted in the desired location.

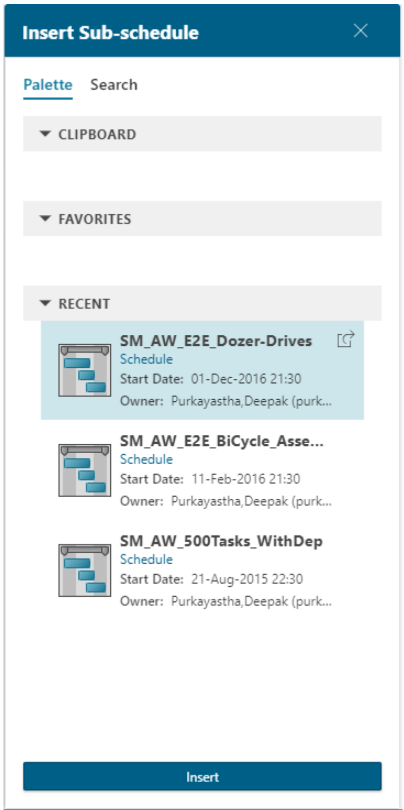
To	Do
Insert a subschedule between master schedule tasks.	Select the task row *above* which you want to insert the subschedule.
Insert the subschedule after all the master schedule tasks.	Select the master schedule's summary task.

6. Do one of the following.

To	Do
Insert a subschedule on the **Tasks** tab.	From the primary toolbar, click **Edit** > **Insert Sub-schedule**.
Insert a subschedule on the **Gantt** tab.	From the work area toolbar, click **Insert Sub-schedule**.

7. In the **Insert Sub-schedule** panel, do one of the following.

To	Do
Search for a schedule.	a. Click the **Search** tab. b. Enter the search criteria and click . c. Select a schedule from the returned list.
Select a schedule that was previously copied to the paste buffer using **Copy** .	a. Click the **Palette** tab. b. Select a schedule from the **Clipboard** section.
Select a favorite or recently viewed schedule.	a. Click the **Palette** tab. b. Select a schedule from the **Favorites** or **Recent** section.



8. Click **Insert**.

Detach a subschedule from a schedule

As a schedule coordinator, you can detach a subschedule from a master schedule without deleting the subschedule from Teamcenter. You can detach a subschedule using either the master schedule's **Task** tab or the **Gantt** tab—whichever view you prefer.

> Note:
>
> Even though you use the **Delete Tasks** command to detach the subschedule, the subschedule is not deleted from Teamcenter.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Select the desired schedule and click **Open** .

4. Click either the **Tasks** tab or the **Gantt** tab, depending on the view that you prefer.

5. Select the subschedule from the list.

6. Do one of the following.

To	Do
Delete a subschedule on the **Tasks** tab.	From the primary toolbar, click **Edit** > **Delete**.
Delete a subschedule on the **Gantt** tab.	From the work area toolbar, click **Delete**.

7. Click **Delete** on the message that is displayed.

Updating schedules

Update a schedule's properties

As work proceeds on a schedule, you can manually update schedule properties to reflect the current schedule state. Only schedule coordinators can update a schedule's **Planning Properties**, **Execution Properties**, **Flags**, and **Stakeholder** values. Schedule team members can update the **Execution Properties** values on tasks that are assigned to them as they complete work. You can update properties on a single schedule, multiple schedules, or on the Information panel.

The selected display method (**Table**, **Table with summary**, **List with summary**) affects where you make the updates and how many schedules you can update. To update a schedule while in the **List** display method, use the **Information** panel, or open the schedule and update the properties on the **Overview** tab.

Update properties on a single schedule

You can also use **Edit** **Start Edit** on the primary toolbar to update a schedule's properties from the **Overview** tab within the open schedule.

1. Click **SCHEDULES** on your home page.

2. Select either the **List with summary** or **Table with summary** display method.

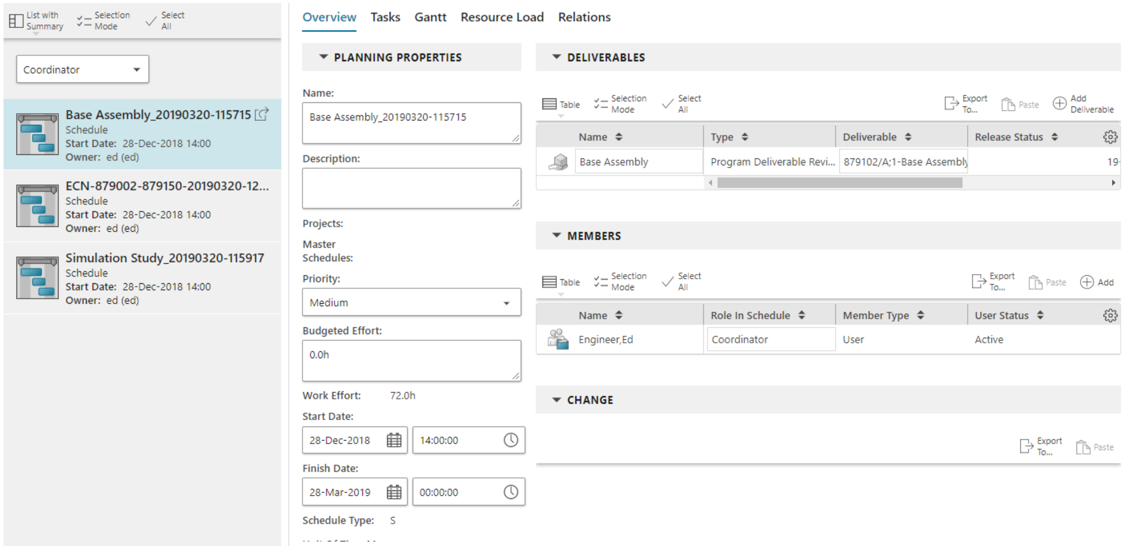
3. Select the desired schedule from the list.

4. From the primary toolbar, click **Edit** **Summary**.

   Note:

   If you are using the **Table with summary** or **Table** display method, you click **Edit** in the upper right corner to update certain schedule properties from within the table.

5. Edit the schedule's properties.



6. From the primary toolbar, click **Edit** ✎ **Save Edits**.

Update properties on multiple schedules

This display method enables you to update properties directly within the table. It's a convenient method to use to update properties on more than one schedule.

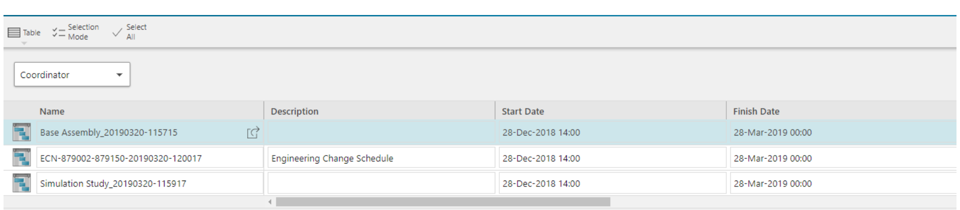
1. Click **SCHEDULES** on your home page.

2. Select either the **Table** ▤ or the **Table with summary** ◫ display method.

3. Using multiselect mode, select the schedules from the list.

4. Click **Edit** ✎ in the upper right corner of the view.

5. Edit the schedules' properties in the table.



6. Click **Save** to save or cancel your edits.

Update a schedule's properties in the Information panel

You can access the **Information** panel from within any display method.

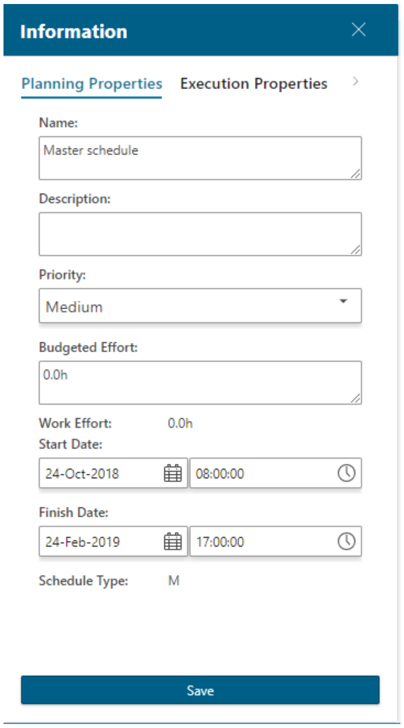
1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. Select the desired schedule.

3. From the primary toolbar, click **Information** ⓘ.

4. In the **Information** panel, click **Edit**.

5. Edit the schedule's properties.



Click > to select from the various schedule property types.

6. Click **Save**.

Change schedule owner

You can change the owner of an existing schedule. The new owner becomes the coordinator of the schedule.

1. Open the schedule with the owner that you want to change.

2. Click **Manage** > **Change Owner**.

   The **Change Owner** panel opens.

3. Select the new owner from the list. You can use the **Filter** box to quickly search for the new owner.

4. Click **Change**.

   The user is added to the schedule as the new owner. The **MEMBERS** section displays the added user with the role of **Coordinator**.

Shift a schedule

As a schedule coordinator, when the projected timeline of a project changes you can shift the schedule's start date (for start date schedules) or finish date (for finish date schedules). This action shifts the entire schedule, including schedule tasks and subschedules.

This action cannot be undone.

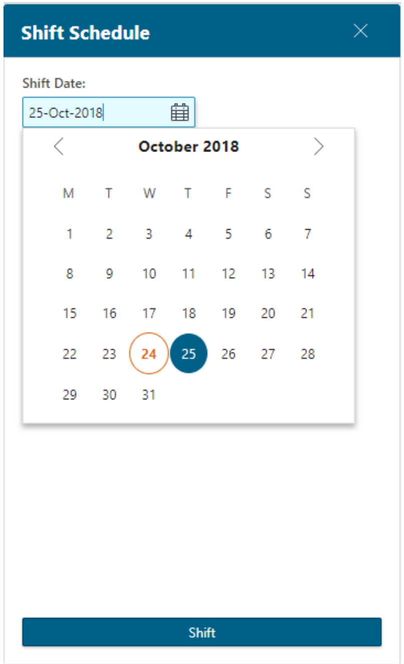
> Note:
>
> Teamcenter Dispatcher Server must be installed to complete this task. Your system administrator can find information about configuring asynchronous services in *Installing and Configuring Dispatcher* in the Teamcenter help collection.

1. Navigate to and select the desired schedule.

2. Click the **Gantt** tab.

3. From the work area toolbar, click **Shift** .

4. In the **Shift Schedule** panel, select a new date in the **Shift Date** box.



5. Click **Shift**.

6. Click **Shift** on the message that is displayed.

Managing schedules

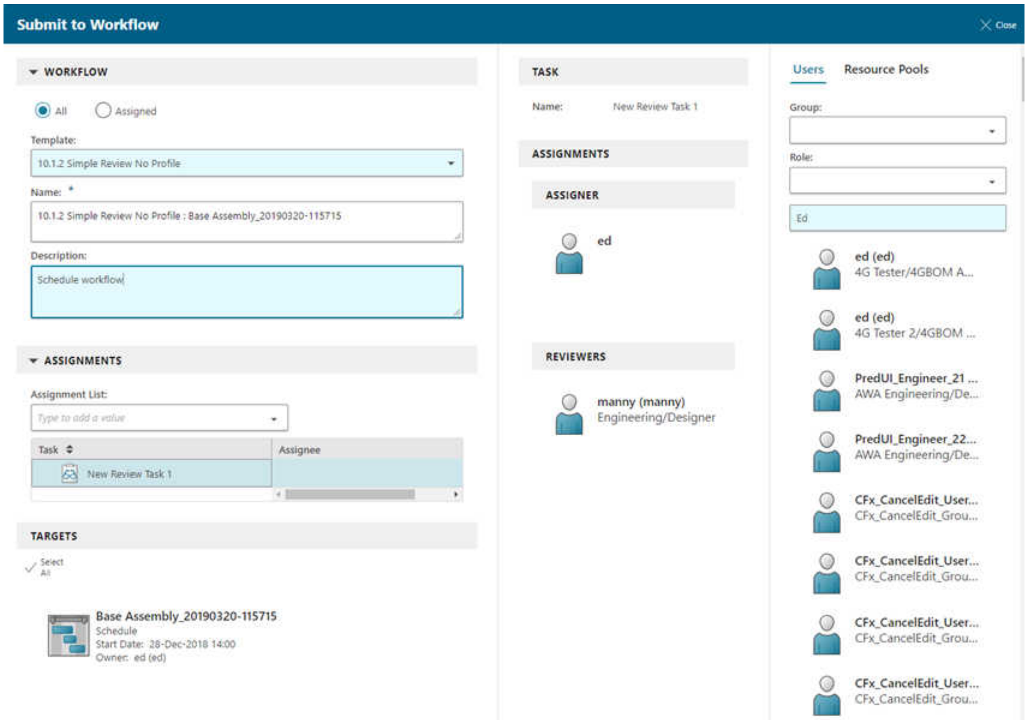
Submit schedules to a workflow

As the schedule coordinator, you can submit your schedules to a workflow to review changes and get approvals from management and others involved. You can also select the workflow template and set user assignments for the workflow tasks before you finalize the submission.

1. Click **SCHEDULES** on your home page to view a list of your schedules.

2. Select the schedules that you want to submit to the workflow from the list, and then click **Manage** > **Submit to Workflow**.

   The **Submit to Workflow** panel opens.



3. In the **Workflow** section, do the following:

   a. Choose to show **All** workflow templates or only **Assigned** templates.

   b. Select a template from the list. The template you select determines which actions are taken on the selected schedule.

   c. Enter a **Description** if necessary.

4. In the **Assignments** section, do the following if you want to assign or replace users or resource pools for the workflow.

   This area can vary in appearance according to what is required of the template.

   a. Select an **Assignment List(s)**, if any exist for the template. The dropdown is displayed only when lists are available to choose from.

   b. Select the workflow task from the table displayed in the **Assignments** section. The panel expands to show the task information and the available users you can select for the task.

   c. You can filter the users list by **Group** or **Role** by entering a user's name in the **Filter** box. You can also click the **Resource Pools** tab to assign the workflow task to a predefined team.

   d. Select a user or resource pool from the list and drag to the appropriate area in the **Assignments** section. Alternatively, you can click **Assign** in the appropriate section.

e. Click **Modify** to finalize the user assignments.

5. (Optional) In the **Targets** section, verify that the correct schedule objects are listed. You can also remove unnecessary objects from this section if necessary.

6. Click **Submit** to send the selected schedules to the workflow.

Show or hide a schedule's critical path

As a schedule coordinator, it is useful to calculate the critical path of a schedule or master schedule to monitor how the end dates of the project change as tasks and resource requirements change.

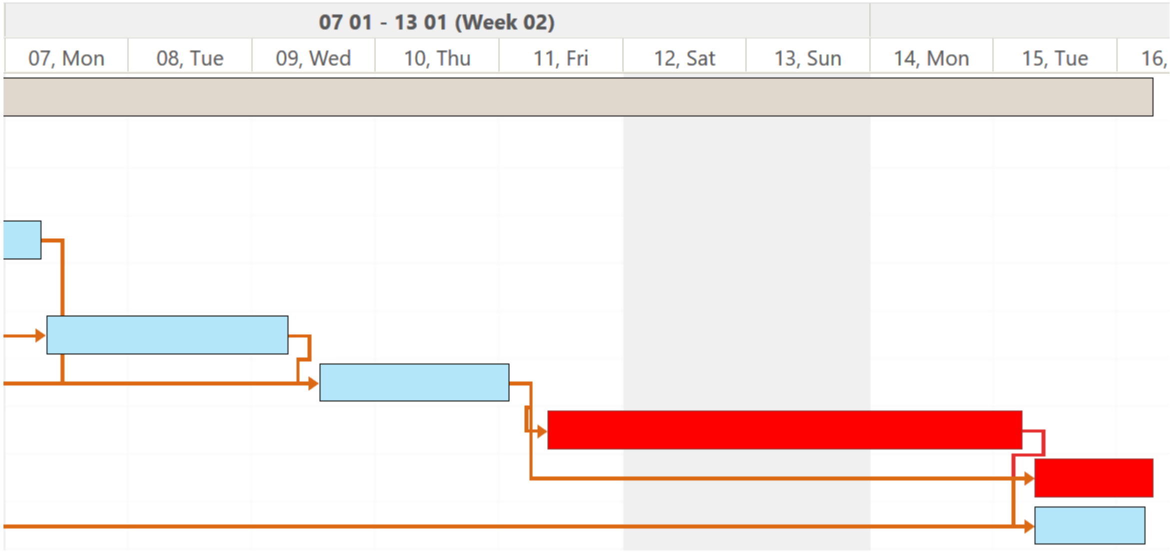
> Note:
>
> By default, the critical path does not automatically display when you access this tab, unless your system administrator sets the **SM_View_CriticalPath** preference to **True**. However, you can always toggle to show or hide the critical path.

1. Navigate to and select the desired schedule.

2. Click the **Gantt** tab.

3. From the work area toolbar, click **Show Critical Path** or **Hide Critical Path** to toggle between seeing or hiding the critical path.

   The critical tasks are highlighted to show the critical path.



Assign or remove a project's schedule

As a schedule coordinator, you can assign a schedule to one or more Teamcenter projects when you create the schedule, or you can assign the projects after the schedule is created. Adding a schedule to a project allows you to constrain your schedule membership to resources found in the project, if desired.

The assigned Teamcenter projects hyperlinks display in the **Projects** field on the schedule's **Overview** tab.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Select a schedule from the list.

4. Click **Open**.

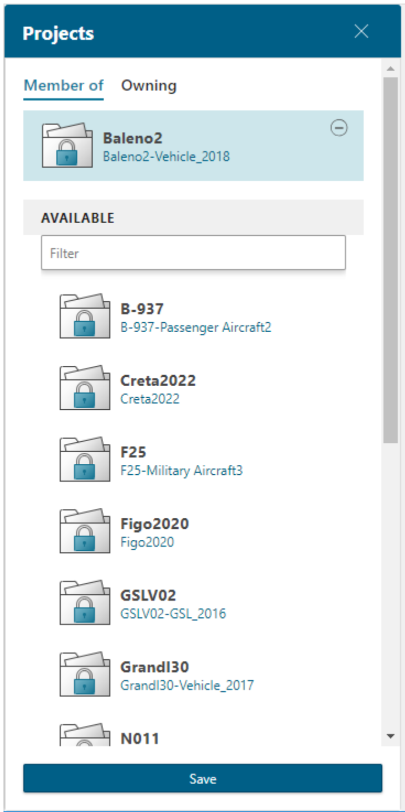
   This task can be completed from any tab within the open schedule.

5. From the primary toolbar, click **Manage** > **Projects**.

   > Note:
   >
   > This icon is available only if a security-level project has been defined in Teamcenter.

6. Do one of the following.

To	Do
Assign a schedule to one or more projects.	In the **Projects** panel, hover over a project listed under the **Available** heading and click **Add Project**, which is displayed next to the project you are hovering over. You can select more than one project by clicking **Add Project** next to each project you want to select.

To	Do
	
Remove a schedule from a project.	Hover over a project under the **Member of** heading, and click **Remove Project** ⊖.

7. Click **Save**.

Compare schedule planning properties

As a schedule coordinator, you can compare the planning properties for multiple schedules.

> Note:
>
> You can compare common properties for other selected objects, such as schedule tasks or schedule members, by selecting the **Compare** display mode available in many Active Workspace pages.

1. Click **SCHEDULES** on your home page.

2. (Optional) Filter the returned list to quickly find the desired schedules.

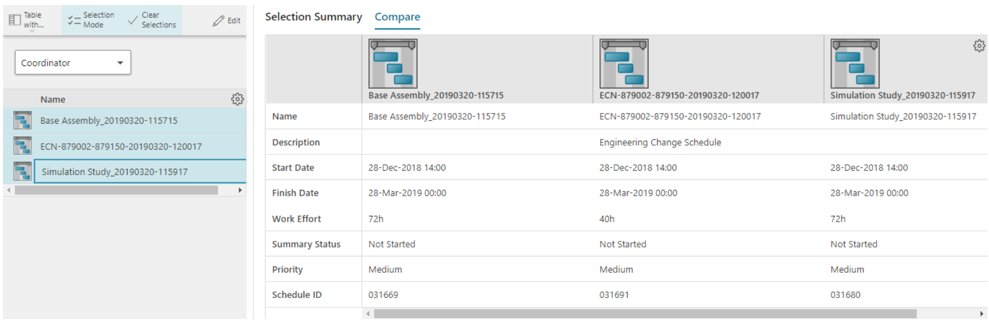
3. Select the **Table with summary** display method.

4. Enter multiselect mode and click the schedules to include in the comparison.

   The schedules you select are highlighted.

5. Click the **Compare** tab.

6. Review and compare the **Planning** properties for the selected schedules.



Delete a schedule with a Not Started state

As a schedule coordinator, you may want to delete a schedule that is no longer valid. You can only delete schedules in a **Not Started** state. All schedule tasks within the schedule must also be in a **Not Started** state. All associated schedule tasks are also deleted.

The following apply:

- You cannot delete a schedule that is locked or a schedule that has schedule tasks that have been locked.

- To delete a subschedule, you must first detach the relationship to the master schedule and then delete the subschedule.

- You can delete a master schedule without first deleting any subschedules.

- If a schedule contains an associated schedule or schedule task deliverable, the relation between the schedule and the deliverable is removed when the schedule is deleted, but the deliverable object itself is not deleted.

1. Click **SCHEDULES** on your home page.

2. On the **Not Started** tab, select the schedule you want to delete.

   To select more than one schedule, enter multiselect mode and click the desired schedules.

3. Click **Edit** > **Delete Schedules**.

4. On the message that appears, click **Delete**.

Performing what-if analysis

What is a what-if analysis?

Performing a what-if analysis on a schedule allows you to change various schedule component values and observe how those changes would affect the outcome of the schedule, without actually applying those changes to the live schedule. For example, as a schedule coordinator you can change the schedule start and end dates, add and delete schedule tasks, and assign resources to tasks. If these changes have a positive effect on the schedule you can promote the changes to the live schedule. If the changes don't have a positive effect you can cancel the what-if mode without actually modifying the live schedule.

The following apply in what-if analysis mode:

- Teamcenter locks the live schedule so that only certain updates can be made against the live schedule, including actions related to schedule deliverables, schedule membership, schedule task execution, and schedule task deliverables.
- Most updates are cached until the what-if session is promoted, including actions related to schedule planning properties, schedule flags, schedule task planning properties, schedule task dependencies, schedule task assignments, and shifting a schedule.
- Some updates are not allowed while the schedule is in what-if analysis mode, including actions related to schedule execution, inserting or detaching subschedules, and schedule task flags.
- If you navigate away from the schedule or sign out of Active Workspace while in what-if analysis mode, your what-if session is preserved and the schedule remains locked.

What can I do while in what-if analysis mode?

You can perform most schedule maintenance functions while in what-if mode, including:

- Task management, including adding and deleting schedule tasks and updating schedule task planning properties.
- Creating, deleting, and updating task dependencies, including cross-schedule dependencies.
- Resource management, including assigning and reassigning resources, and removing all task assignments for a resource.
- Shifting a schedule.

Perform a what-if analysis on a schedule

As a schedule coordinator, use the what-if analysis mode to observe how changes may affect the outcome of the schedule without actually updating the live schedule.

> Note:
>
> While in what-if analysis mode, some actions are made directly against the live schedule, although most actions are cached until the what-if session is promoted or canceled. There are a few actions that are not allowed during what-if analysis, such as inserting or detaching subschedules and modifying schedule execution properties.

1. Click **SCHEDULES** on your home page.

2. Select the desired schedule and click **Open**.

3. Click the **Gantt** tab.

4. From the work area toolbar, click **What-if Analysis**.

5. Make modifications to the schedule to determine how the modifications will affect the schedule's outcome.

6. Do one of the following.

To	Do
Cancel the what-if analysis and undo the schedule changes.	• From the work area toolbar, click **Cancel**.
Promote the schedule changes to the live schedule and exit the what-if analysis mode.	• From the work area toolbar, click **Promote**.

Comparing the planned schedule with the current schedule

About baselining schedules

As a schedule coordinator, you can create a schedule baseline, which represents a snapshot of the schedule at a given time. This allows you to view how the actual schedule compares with the originally planned schedule, assessing which tasks have slipped and which tasks have been completed ahead of schedule. It also allows you to compare estimated duration against actual duration.

You can also create multiple baselines for a schedule. You can manage these baselines by **editing the details**, **deleting out-of-date baselines**, and **choosing which baseline to set as *active***.

If you are using a master schedule and subschedules, all baseline operations applied to the master schedule appear on the subschedules, and vice versa. However, if you open a subschedule the baseline does not appear in the opened subschedule.

> Note:
>
> Teamcenter Dispatcher Server must be installed to baseline schedules. Your system administrator can find information about configuring asynchronous services in *Installing and Configuring Dispatcher* in the Teamcenter help collection.

Create a schedule baseline

As a schedule coordinator, you can create a baseline from the current schedule to use as a snapshot against which to compare the schedule at a future date.

> Note:
>
> Teamcenter Dispatcher Server must be installed to create a schedule baseline. Your system administrator can find information about configuring asynchronous services in *Installing and Configuring Dispatcher* in the Teamcenter help collection.

In some cases, it may take Active Workspace time to create the schedule baseline. You can check your **Alerts** to see if the process has completed.

1. Navigate to the desired schedule and open it.

2. Click the **Gantt** tab.

3. On the primary toolbar, click **New** > **Create Baseline**.

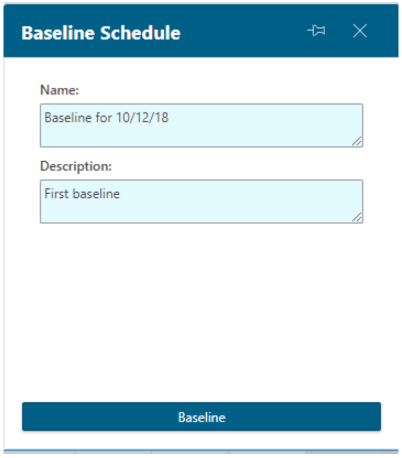
4. On the **Baseline Schedule** panel, do the following.

   a. In the **Name** box, enter a meaningful name for this baseline, if desired. The default value is the schedule name.

   b. In the **Description** box, enter a meaningful description for this baseline, if desired.

   c. Select **Active** to make this baseline the active baseline. The active baseline information is shown for the baseline columns when not viewing a specific baseline.

   > Note:
   >
   > If this is the first baseline for this schedule, this option does not display. Teamcenter automatically sets this baseline as active.



5. Click **Baseline**.

View a schedule baseline

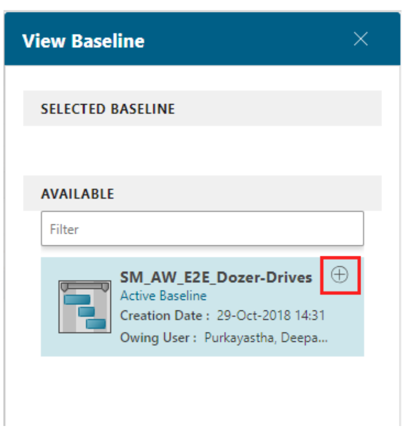
As a schedule coordinator, use this process to view a schedule against a chosen baseline so that you can see how the actual schedule compares with the selected baseline schedule. Using a baseline, you can see which tasks have slipped and which tasks have been completed ahead of schedule. You can view a schedule against any baseline, even if it is not the current baseline. For example, Baseline 10/12/18 might be the current baseline, but you can view your schedule against Baseline 9/18/18, if you wish.

1. Navigate to the desired schedule and open it.

2. Click the **Gantt** tab.

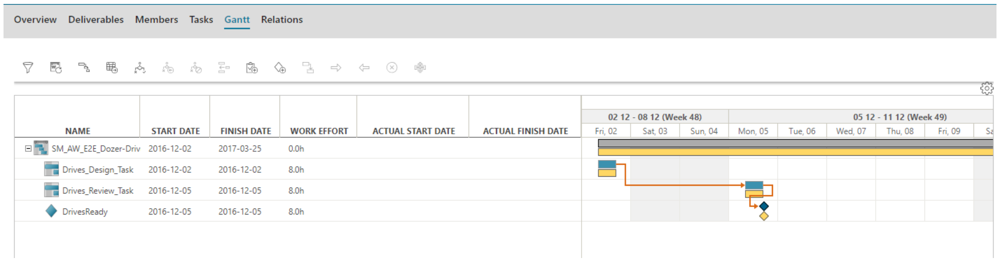
3. Click **View** > **View Baseline**.

4. On the **View Baseline** panel, select the desired baseline and then click **Assign Baseline**.



5. Click **View**.

The baseline schedule values display in yellow.



Set the active schedule baseline

You can choose which schedule baseline to set as active to quickly view the planned dates for the selected baseline.

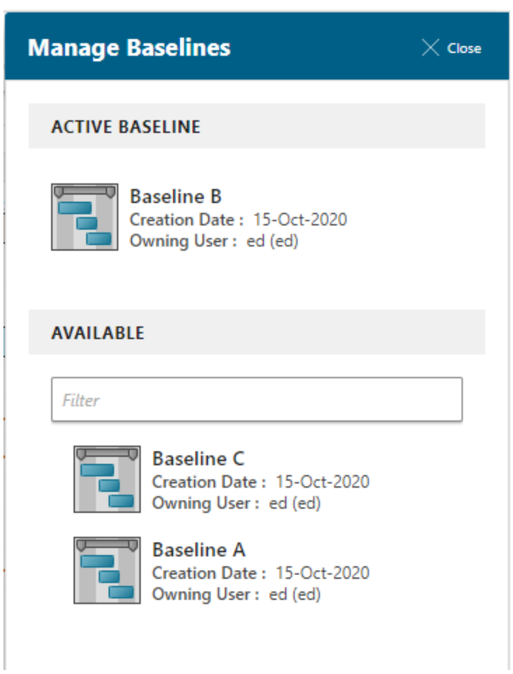
1. Navigate to the desired schedule and open it.

2. Click the **Gantt** tab.

3. On the primary toolbar, click **Manage** > **Manage Baselines**.

   The **Manage Baselines** panel opens and displays all the baselines for the schedule.

   The active baseline is displayed in the **Active Baseline** section. Other baselines created for the schedule are listed in the **Available** section.



4. Select the schedule baseline you want to set as active and then click **Set Active**.

The baseline is moved to the **Active Baseline** section and replaces the baseline that was previously set as active.

Manage schedule baselines

You can edit schedule baselines and change the name and description to keep your schedule baselines up-to-date as work progresses. If the schedule baseline is no longer needed, you can delete it.

Edit a schedule baseline

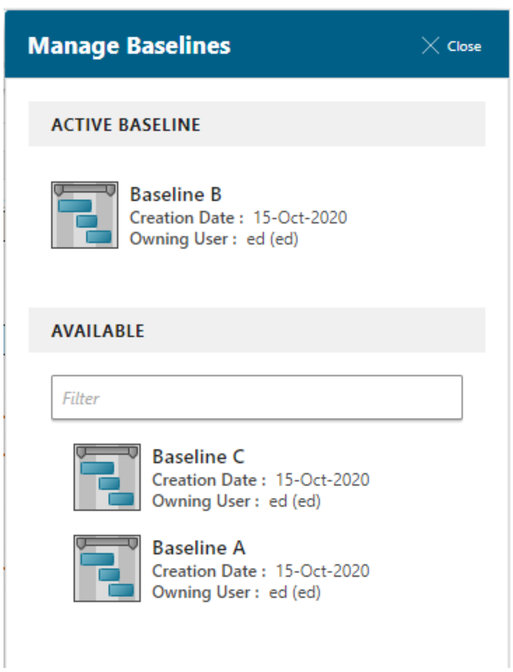
1. Navigate to the desired schedule and open it.

2. Click the **Gantt** tab.

3. On the primary toolbar, click **Manage** > **Manage Baselines**.

   The **Manage Baselines** panel opens and displays all the baselines for the schedule.

   The active baseline is displayed in the **Active Baseline** section. Other baselines created for the schedule are listed in the **Available** section.



4. Select the schedule baseline you want to change and then click **Edit**.

5. Update the schedule baseline **Name** and **Description** as necessary and then click **Save** to return to the **Manage Baselines** panel.

Delete a schedule baseline

You can delete a schedule baseline that is no longer needed. This helps you manage out-of-date baselines for your schedules.

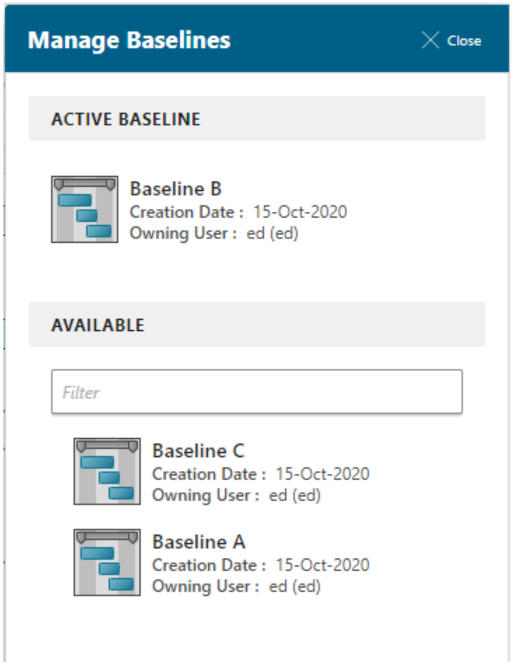
1. Navigate to the desired schedule and open it.

2. Click the **Gantt** tab.

3. On the primary toolbar, click **Manage** > **Manage Baselines**.

   The **Manage Baselines** panel opens and displays all the baselines for the schedule.

   The active baseline is displayed in the **Active Baseline** section. Other baselines created for the schedule are listed in the **Available** section.

4. Select the schedule baseline you want to delete and then click **Delete** .

5. Click **Delete** again when prompted by Active Workspace to confirm the deletion.

Field definitions for schedule planning and execution properties, flags, and stakeholder fields

Schedule coordinators can manually update the schedule's **Planning Properties**, **Execution Properties**, **Flags**, and **Stakeholder** values.

Field name	Definition	Valid values
Name	Uniquely identifies this schedule.	
Description	Describes this schedule.	
Projects	Displays hyperlinks to Teamcenter projects that this schedule is assigned to.	
Priority	Identifies the priority assigned to this schedule. This list of values may be modified by your system administrator.	The out-of-the-box values are: **Lowest** **Low** **Medium Low** **Medium** **High** **Very High** **Highest**
Budgeted Effort	Identifies the budgeted hours for completing this schedule.	Enter a numerical value.
Work Effort	Identifies the estimated effort needed to complete this schedule.	
Start Date	Specifies the target start date of the schedule. Note that the date entered is not validated against the schedule's tasks at the time of creation. However, on edit, the system warns you that there may be tasks that go beyond schedule dates.	Click the date box to select a date from the calendar. Click the time box to select a time. If no value is selected, the time defaults to the current date and time.
Finish Date	Specifies the target finish date of the schedule. Note that the date entered is not validated against the schedule's tasks at the time of creation. However, on edit, the system warns you that there may be tasks that go beyond schedule dates.	Click the date box to select a date from the calendar. Click the time box to select a time. If no value is selected, the time defaults to three months in the future and the current time.
Unit of Time Measure	Identifies the unit of measure used to calculate the schedule task's **Duration**, **Work Effort**, **Work Complete**, and **Percent Complete** values. The default value is hours (h).	**Hours (h)** **Days (d)** **Weeks (w)** **Months (mo)**

Field name	Definition	Valid values
	A subschedule does not inherit the master schedule's unit of time value.	
Schedule Type	Indicates the schedule's relationship with another schedule. The **Schedule Type** value for a standalone schedule is **S** but changes when the schedule becomes a subschedule or a master schedule.	**S** - schedule **M** - master schedule **SUB** - subschedule **MS** - master subschedule
Schedule State	Identifies the current state of this schedule. A schedule progresses through a series of predefined states as the schedule work is completed. The **Schedule State** value affects the available values within the **Schedule Status** box, and the two values work together to provide a complete picture of the schedule's progress. For example, the schedule's state is **In Progress** but its status is **Needs Attention**. Select a value from the list of values.	**Not Started** **In Progress** **Complete** **Closed** **Aborted**
Schedule Status	Identifies the current status of this schedule *within the selected state*. Note that the list of values for this field changes based on what is selected in the **Schedule State** box. The two values work together to provide a complete picture of the schedule's progress. For example, the schedule's state is **In Progress** but its status is **Needs Attention**. Select a value from the list of values. Caution: Once a schedule has been set to **Abort**, the status cannot be changed or reversed.	**Not Started** **In Progress** **Needs Attention** **Late** **Complete** **Abandoned** **Aborted**
Work Complete	Identifies the number of hours completed on this schedule and reflects a rollup of the **Work Complete** field values on the schedule tasks.	

Field name	Definition	Valid values
Percent Complete	Identifies the total percentage of work that has been completed on this schedule.	
Forecast Start Date	Specifies the date and time that work on this schedule is forecasted to begin.	Click the date box to select a date from the calendar. Click the time box to select a time.
Actual Start Date	Specifies the actual date and time that work on this schedule began.	
Forecast Finish Date	Specifies the date and time that work on this schedule is forecasted to end.	Click the date box to select a date from the calendar. Click the time box to select a time.
Actual Finish Date	Specifies the actual date and time that work on this schedule ended.	
Published	Determines if the schedule is published. If a schedule is published and public (see **Is Schedule Public,**), even users who are not assigned to the schedule can see it. If this schedule is published, but is not public, only users who are assigned to the schedule can see it.	
Public	Determines who can see this schedule. If the schedule is public, all users, including users who are not assigned to the schedule, can see the schedule, if it is published.	
Template	Identifies if this schedule can act as a template for new schedules.	
External	Identifies if scheduling logic and validations are to be performed on the schedule tasks. The system sets the default value, but the schedule coordinator can change the value. When set to **True**, a schedule user can edit the schedule and task properties, but these edits are not validated by the scheduling engine.	

Field name	Definition	Valid values
Actual Dates Linked	Determines if the planned schedule dates and actual schedule dates are linked as follows: • Changing the actual start or finish date changes the scheduled start or finish date. • Changing the scheduled start or finish date does not change the actual start or finish date, respectively. If true, the dates default to the scheduled date regardless of how the system is configured. If false, the actual start and finish dates are set to the configured default (either today or scheduled) set up by the system administrator.	
Percent Linked	Determines the correlation between work completed and percentage completed. The following applies: • If you change the work completed, the percentage completed changes to equal the percent of scheduled work completed. • If you change the percentage completed, the work completed changes to equal the schedule work multiplied by the percentage completed.	
Notifications Enabled	Specifies that notifications are sent when specific triggers occur within a schedule. These are based on various events or conditions defined on tasks in Teamcenter, for example, sending a notification when a task gets deleted or when a task is overdue.	
Finish Date Scheduling	Specifies finish-date-based scheduling. In finish-date-based schedules, you create your tasks from the finish date backward, rather than the start date forward.	

Field name	Definition	Valid values
Owner	Identifies the owner of this schedule.	
Customer	Identifies the customer associated with this schedule.	
Customer Number	Identifies the customer number associated with this schedule.	

9. Creating and managing schedule tasks

About schedule tasks

Schedule tasks, which appear on the schedule's **Task** tab, identify the activities and deliverables for a schedule. You can open a task to view the properties, deliverables, assigned members, and task dependencies.

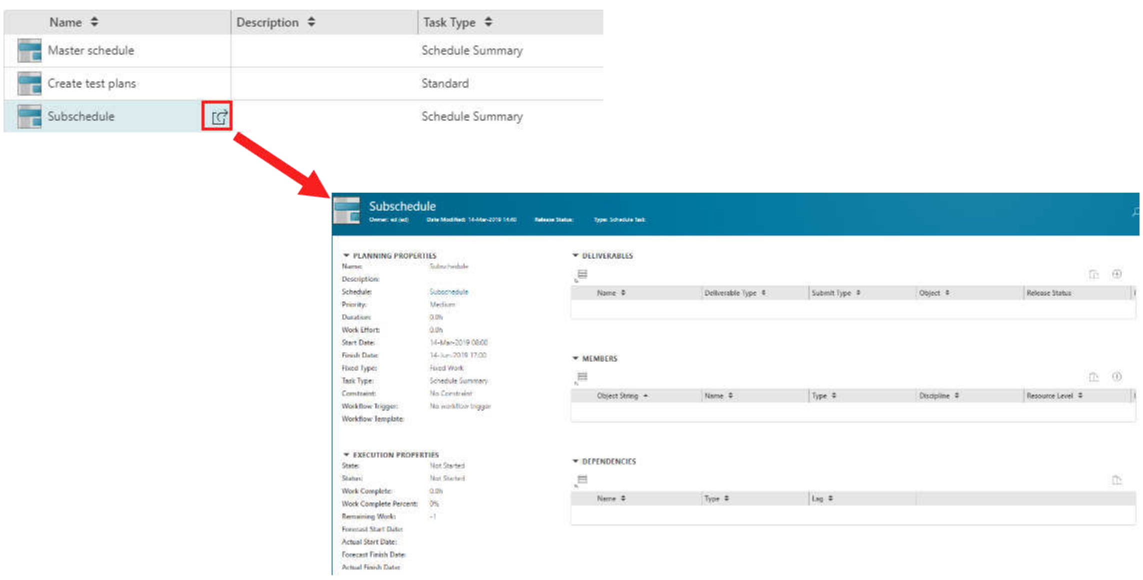
Schedule tasks behave the same whether they are created on a schedule, master schedule, or subschedule.

The following applies to schedule tasks:

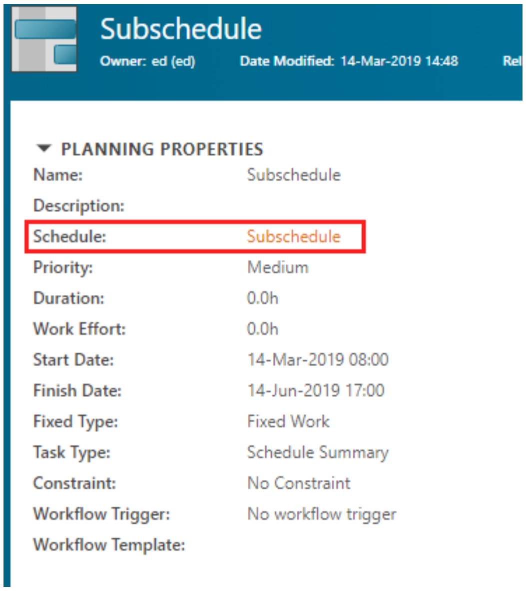
- The top line on the **Tasks** tab is the schedule summary task for the schedule and cannot be deleted.

- When you insert a subschedule into a schedule, the subschedule appears as a schedule task on the master schedule.

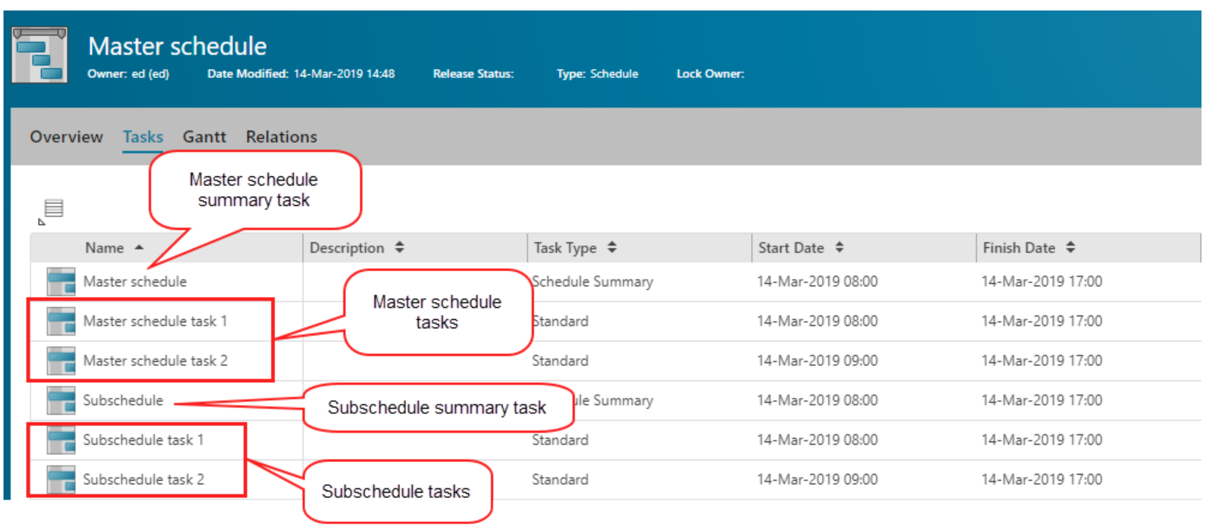
  - Opening a subschedule from the **Tasks** tab opens the subschedule as a **Schedule Task** of the master schedule. You can assign deliverables and create task dependencies just as you would on a standard schedule task.



  - To navigate to the subschedule from within the subschedule task, click the **Schedule** link on the subschedule task's **Overview** tab.



- When you add schedule tasks to a subschedule, the tasks roll up to the master schedule and appear on the master schedule's **Tasks** tab. They also appear on the subschedule's **Tasks** tab.
    - To add a task to a subschedule task while in the master schedule, select the subschedule task from the task list and add the task.
- To create a milestone task on a schedule or subschedule, use **Add Milestone** on the **Gantt** tab, or create a task with no duration value on the **Tasks** tab.



Add or delete a schedule task

As a schedule coordinator, you can add a task to, or delete a task from, a schedule or subschedule as the schedule scope changes. A task can be deleted even if it is associated with a running workflow. If the deleted task is associated with a running workflow, the workflow is stopped and downstream workflow tasks are prevented from starting. You can add or remove a task using the **Task** tab or the **Gantt** tab—whichever view you prefer.

Navigate to the schedule

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Click **Open**.

4. Click the **Tasks** tab.

5. Add a task to a schedule or delete a task from a schedule.

Add a task to a schedule or subschedule

1. Navigate to the schedule.

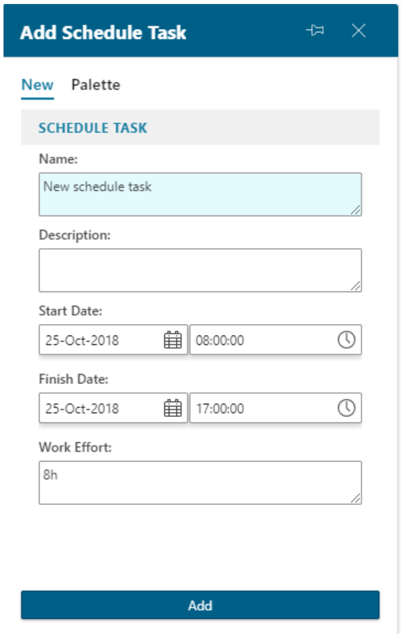
2. Do one of the following.

To	Do
Add a task to a schedule or master schedule.	Select the task beneath which you would like to add the new task. If you don't make a selection from the list, the task is added to the bottom of the list.
Add a task to a subschedule.	Select the subschedule task from the list. Note: A task can be added to a subschedule either from the subschedule's **Tasks** tab, or as described here by selecting the subschedule task from the master schedule's **Tasks** tab.

3. Click **Add Schedule Task**.

4. In the **Add Schedule Task** panel on the **New** tab, select **Schedule Task**, or click the **Palette** tab to paste a task from the clipboard.

5. Complete the schedule task information.



6. Click **Add**.

Delete a task from a schedule

1. Navigate to the schedule.

2. Select the task that you want to delete.

3. Click **Edit** **Delete**.

4. Click **Delete** on the message that is displayed.

Add multiple schedule tasks using the Gantt tab

As a schedule coordinator, you may want to quickly add multiple tasks to a schedule without defining the task parameters during the creation process.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Click **Open** .

4. Click the **Gantt** tab.

5. Do one of the following.

To	Do
Add a task to a schedule or master schedule.	Select the task beneath which you would like to add the new task. If you don't make a selection from the list, the task is added to the bottom of the list.
Add a task to a subschedule.	Select the subschedule task from the list.

6. From the work area toolbar, click **Add Task**.

   The undefined task is added to the schedule with the name, "Task."

7. Double-click the task name to enter a new name for this task.

8. Continue to add undefined tasks to the schedule. Later, when it is convenient, select the task and click **Information** on the primary toolbar to modify the task properties.

Add or delete a milestone

As a schedule coordinator, you can add a milestone to, or delete a milestone from, a schedule or subschedule. A milestone is a specific time point on a schedule, typically associated with a significant event. This topic describes how to add or delete a milestone using the **Gantt** tab. You can also add a milestone on the **Tasks** tab by adding a schedule task that has no task duration.

Navigate to the schedule

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Click **Open**.

4. Click the **Gantt** tab.

5. Add a milestone to a schedule or delete a milestone from a schedule.

Add a milestone to a schedule or subschedule

1. Navigate to the schedule.

2. Do one of the following.

To	Do
Add a milestone to a schedule or master schedule.	Select the task beneath which you would like to add the milestone. If you don't make a selection from the list, the milestone is added to the bottom of the list.
Add a milestone to a subschedule.	Select the subschedule task from the list.

3. From the work area toolbar, click **Add Milestone**, or right-click the task and select **Add Milestone**.

   The undefined milestone is added to the schedule with the name, Milestone.

4. Double-click the milestone name to enter a new name for this milestone.

5. (Optional) From the primary toolbar, click **Information** to modify the milestone's properties.

Delete a milestone from a schedule

1. Navigate to the schedule.

2. Click the **Gantt** tab.

3. Select the milestone that you want to delete.

4. From the work area toolbar, click **Delete**.

5. Click **Delete** on the message that is displayed.

Copy and paste an existing schedule task

As a schedule coordinator, you can quickly add a schedule task to a schedule by copying an existing task and pasting it into either the same schedule or a different schedule. This is useful when you need to create tasks that have properties similar to existing tasks.

When you copy a task from one schedule and paste it into a different schedule, the schedule task deliverables will not be included. Likewise, subscriptions do not persist when copying and pasting schedule tasks across schedules.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Click **Open**.
4. Click the **Tasks** tab.
5. Select the desired task and click **Copy**.
6. (Optional) Navigate to the **Task** tab of the schedule where you want to paste the copied task.
7. Select a task and click **Paste**.

   The copied task is pasted below the selected task.

> Note:
>
> You cannot paste a task into a schedule when the schedule summary task (top row) is selected. The paste command works only when a task is selected.

Field definitions for schedule task planning properties

Schedule coordinators can update the following schedule task **Planning Properties** values.

Field name	Definition	Valid values
Name	Uniquely identifies this schedule task.	
Description	Describes this schedule task.	
Priority	Identifies the priority assigned to this task. This list of values may be modified by your system administrator.	The out-of-the-box values are: **Lowest** **Low** **Medium Low** **Medium** **High** **Very High** **Highest**
Duration	Identifies the calendar time estimated to complete a task.	

<table>
<tr><th>Field name</th><th>Definition</th><th>Valid values</th></tr>
<tr><td>Work Effort</td><td>Identifies the estimated work units needed to complete a task. All entries are ultimately displayed in hours so, for example, if you enter 2d it will display as 16h on the Schedule's Task tab.

Note:

Use only a single time unit when entering the work effort value, for example 25d. This field does not accept compound time units, such as 1mo1w.</td><td>Work efforts can be defined by the following suffixes:

h - hours
d - days
w - weeks
mo - months</td></tr>
<tr><td>Start Date</td><td>Specifies the date that work on this task is to begin. Note that the date entered is validated against the schedule start date. If the task start date precedes the schedule start date, Teamcenter prevents the update.</td><td>Click the date box to select a date from the calendar. Click the time box to select a time.

If no value is selected, the time defaults to the current date and time.</td></tr>
<tr><td>Finish Date</td><td>Specifies the date that work on this task is to end. Note that the date entered is validated against the schedule finish date. If the task finish date is after the schedule finish date, Teamcenter prevents the update.</td><td>Click the date box to select a date from the calendar. Click the time box to select a time.

If no value is selected, the time defaults to the current date and time.</td></tr>
<tr><td>Fixed Type</td><td>Controls which of the three factors (work, duration, or resources) remains fixed and which change to accommodate changes to the schedule.

The following table show what happens when you fix one of the factors, and then change one of the other factors.

<table>
<tr><th>Fixed Type</th><th>Change Resources, Schedule Manager changes</th><th>Change Duration, Schedule Manager changes</th><th>Change Work, Schedule Manager changes</th></tr>
<tr><td>Fixed Resources</td><td>Duration</td><td>Work</td><td>Duration</td></tr>
</table></td><td>Fixed Work
Fixed Duration
Fixed Resource</td></tr>
</table>

Field name	Definition	Valid values
	Fixed Duration — Work — Resources — Resources **Fixed Work** — Duration — Resources — Duration	
Task Type	Indicates the object type.	**Schedule Summary** **Orphan** **Standard** **Milestone** **Phase** **Gate**
Constraint	Forces a shift in the schedule based on the selected constraint type.	**No Constraint** **As Late As Possible** works with task dependencies to schedule a task as late as the task dependency and other scheduling considerations allow. **As Soon As Possible** works with task dependencies to schedule a task as soon as the task dependency and other scheduling consideration allow. **Fixed** does not allow the schedule task dates to be changed.
Workflow Trigger	Identifies what action triggers the workflow for this task to begin.	**No workflow trigger** **Predecessors complete** **Schedule start date** **Both scheduled start date and predecessors complete** **Either scheduled start date and predecessors complete**

Field name	Definition	Valid values
Workflow Template	Defines the blueprint of the workflow to be performed.	Select from the defined list.

Adding proxy and mirror tasks

About proxy tasks

As the schedule coordinator, you can add proxy tasks in a schedule, which represent a task, from a different schedule. This allows you to track the status of the proxy task from within your schedule and can be used to create cross-schedule task dependencies. When you view the schedule containing the proxy task from the **Gantt** view, the schedule that contains the original task is displayed next to the proxy task name in parentheses.

Keep the following in mind when using proxy tasks:

- A proxy task cannot be modified. When the original task is modified, the changes to the original task are displayed in the proxy task.
- Proxy tasks cannot be created for tasks within the same schedule.
- Dependency changes made to the original task also change the dependencies on the proxy task.
- Proxy tasks are ignored when importing the schedule into Microsoft Project.
- Template schedules can contain proxy tasks from other template schedules.
- Non-template schedules can contain proxy tasks from other non-template schedules.
- Schedule baselines do not include proxy tasks or cross-schedule dependencies.

You can add the proxy task from the **Gantt** view using one of the following methods:

- **Add a proxy task by selecting the original task from the Palette tab or the Search tab of the Add Proxy Task panel.**
- **Add a proxy task by copying the original task and then selecting it from the Clipboard section of the Add Proxy Task panel.**
- **Create a dependency between two tasks in different schedules.** The target task is made a proxy task of the task you create the dependency with.

Mirror as proxy tasks

When you have a schedule that contains one or more subschedules, you can **select a schedule task from the master schedule and then mirror it as a proxy task** to either the first level of subschedules or all subschedules under the master schedule. This allows you to quickly add proxy tasks to a large schedule that contains many different levels of subschedules.

> Note:
>
> Your administrator can set the **SM_PREVENT_UPDATE_STATES** system preference to prevent schedules under the subschedule from inheriting the proxy task.

ID	NAME	START DATE	FINISH DATE	WORK EFFORT	PREDECESSORS	SUCCESSORS
1	New Product Line	2020-10-14	2021-02-14	8.0h		
2	Report results	2020-10-14	2020-10-23	8.0h		
3	Market Planning	2020-10-14	2021-02-14	0.0h		
4	Report results(New Product Line)	2020-10-14	2020-10-23	8.0h		
5	Market Analysis	2020-10-14	2021-02-14	0.0h		
6	Report results(New Product Line)	2020-10-14	2020-10-23	8.0h		
7	Cost Planning	2020-10-14	2021-02-14	0.0h		
8	Report results(New Product Line)	2020-10-14	2020-10-23	8.0h		
9	Cost Analysis	2020-10-14	2021-02-14	0.0h		
10	Report results(New Product Line)	2020-10-14	2020-10-23	8.0h		

Add a proxy task to a schedule

You can add a task from a different schedule as a proxy task in the current schedule. As changes are made to the original task, the proxy task automatically updates to reflect those changes.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Click the **Gantt** tab.

4. Click **New** > **Add Proxy Task**.

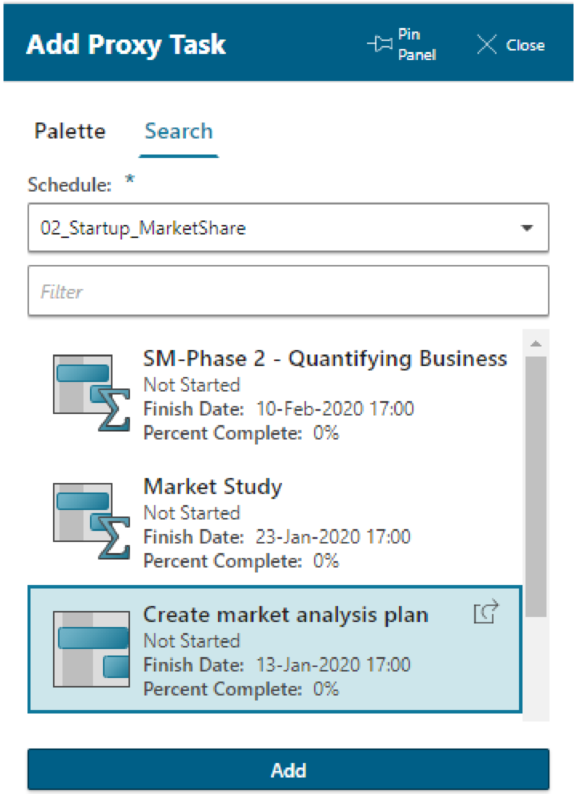
   The **Add Proxy Task** panel opens.

5. Do any of the following to select the proxy task:

   - Select the task from the **Clipboard**, **Favorites**, or **Recent** section of the **Add Proxy Task** panel.

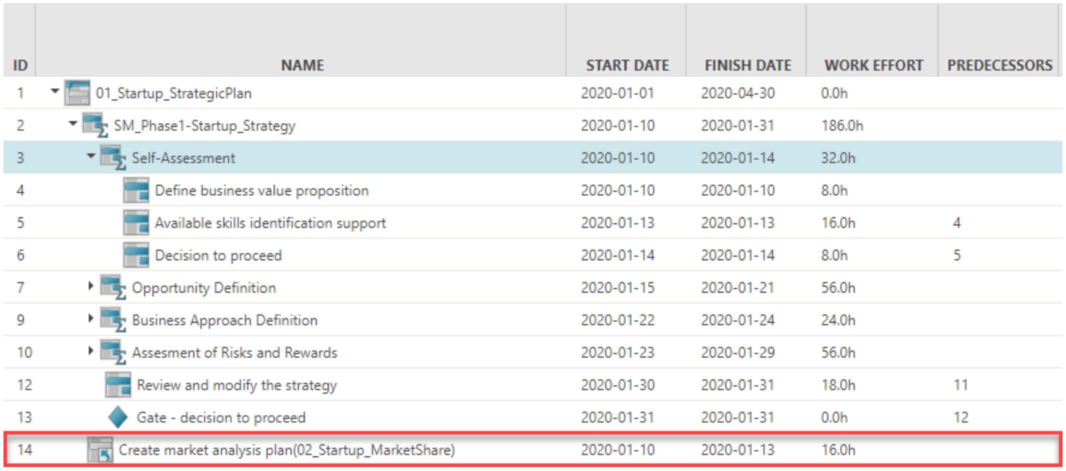
   - Click the **Search** tab and then select the schedule that contains the task you want to add a proxy for from the dropdown list. From the list of schedule tasks, find the desired task and select it.

     > Note:
     >
     > You can use the **Filter** box to quickly find the desired task.



6. Click **Add**.

   The proxy task is added to the current schedule. The name of the schedule that contains the original task is displayed next to the proxy task.



ID	NAME	START DATE	FINISH DATE	WORK EFFORT	PREDECESSORS
1	01_Startup_StrategicPlan	2020-01-01	2020-04-30	0.0h	
2	SM_Phase1-Startup_Strategy	2020-01-10	2020-01-31	186.0h	
3	Self-Assessment	2020-01-10	2020-01-14	32.0h	
4	Define business value proposition	2020-01-10	2020-01-10	8.0h	
5	Available skills identification support	2020-01-13	2020-01-13	16.0h	4
6	Decision to proceed	2020-01-14	2020-01-14	8.0h	5
7	Opportunity Definition	2020-01-15	2020-01-21	56.0h	
9	Business Approach Definition	2020-01-22	2020-01-24	24.0h	
10	Assesment of Risks and Rewards	2020-01-23	2020-01-29	56.0h	
12	Review and modify the strategy	2020-01-30	2020-01-31	18.0h	11
13	Gate - decision to proceed	2020-01-31	2020-01-31	0.0h	12
14	Create market analysis plan(02_Startup_MarketShare)	2020-01-10	2020-01-13	16.0h	

Add a new proxy task from a copied task

You can copy a task from one schedule and create a proxy task from the copied task in a different schedule. As changes are made to the original task, the proxy task is automatically updated to reflect those changes.

1. Search for the schedule that contains the task you want to copy by using the search box, clicking **SCHEDULES** on your home page, or navigating to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Click the **Tasks** tab.

4. Select the task you want to copy and then do one of the following:

   - Click **Copy** from the primary toolbar.

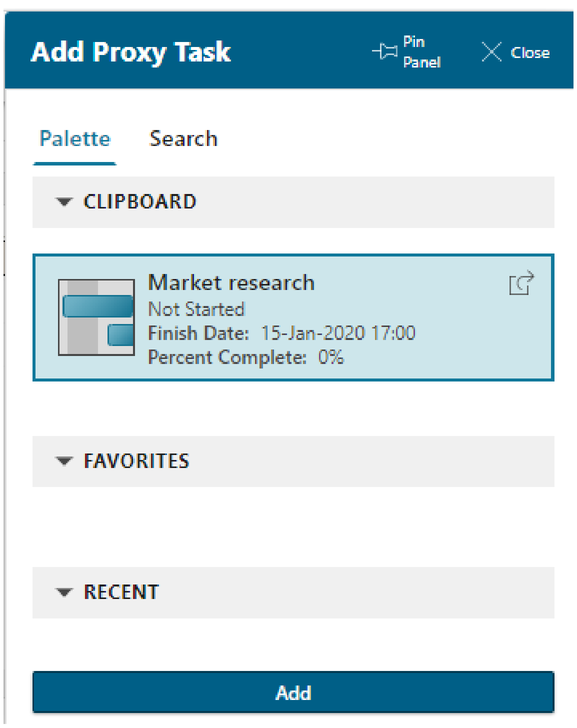
   - Right-click the task and then select **Copy**.

   - Press **Ctrl+C** on your keyboard.

5. Navigate to the **Gantt** tab of schedule where you want to add the proxy task.

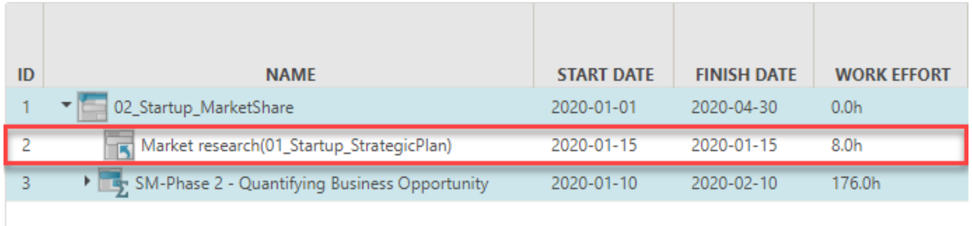
6. Click **New** > **Add Proxy Task**.

   The **Add Proxy Task** panel opens. Any tasks you have copied appear under the **Clipboard** section.



7. Select the task from the **Clipboard** section and then click **Add**.

   The proxy task is added to the current schedule. The name of the schedule that contains the original task is displayed next to the proxy task.



Mirror task as a proxy task

When you have a schedule that contains one or more subschedules, you can select a schedule task from the **Gantt** view and then mirror it as a proxy task to either the first level of subschedules or all subschedules under the master schedule. When you mirror the task, it creates a copy of the original task in the corresponding subschedules.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

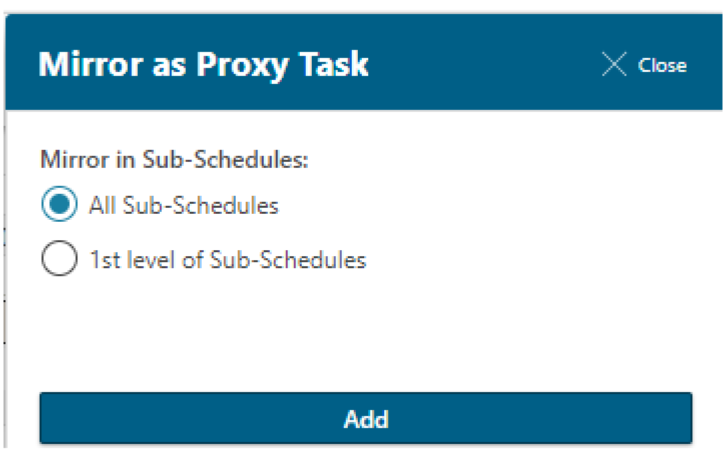
2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Click the **Gantt** tab.

4. Select the task you want to mirror as a proxy task to the subschedules.

5. Click **New** > **Mirror as Proxy Task**.

   The **Mirror as Proxy Task** panel opens.



6. Choose one the following:

   - **All Sub-Schedules.** Mirrors the task as a proxy task in all of the sub schedules under the master schedule.

- **1st level of Sub-Schedules.** Mirrors the task as a proxy task in only the first level of subschedules under the master schedule.

7. Click **Add**.

   The selected task is mirrored as a proxy task across the subschedules.

ID	NAME	START DATE	FINISH DATE	WORK EFFORT	PREDECESSORS	SUCCESSORS
1	New Product Line	2020-10-14	2021-02-14	8.0h		
2	Report results	2020-10-14	2020-10-23	8.0h		
3	Market Planning	2020-10-14	2021-02-14	0.0h		
4	Report results(New Product Line)	2020-10-14	2020-10-23	8.0h		
5	Market Analysis	2020-10-14	2021-02-14	0.0h		
6	Report results(New Product Line)	2020-10-14	2020-10-23	8.0h		
7	Cost Planning	2020-10-14	2021-02-14	0.0h		
8	Report results(New Product Line)	2020-10-14	2020-10-23	8.0h		

Updating schedule tasks

Change a schedule task's duration

As a schedule coordinator, you can quickly update a schedule task's duration in the Gantt view by dragging the task's left handle (start date) and/or right handle (finish date) to a new spot on the date line.

> Note:
>
> You can also update a schedule task's start and finish dates by editing the schedule task's properties on schedule task's **Overview** tab.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

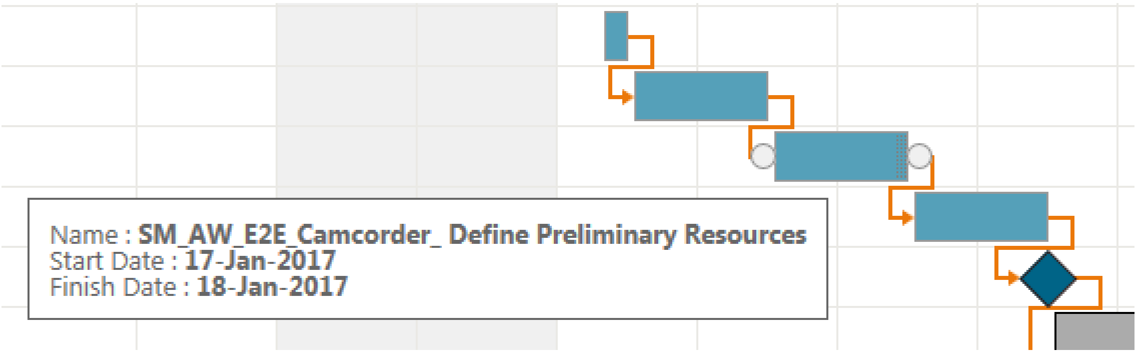
2. (Optional) Filter the list to quickly find the desired schedule.

3. Click **Open**.

4. Click the **Gantt** tab.

5. Hover over the task that you want to modify.

   The task information appears, the task's connection points are displayed on either side of the task, and one side of the task is enabled for dragging.



Note:

This action is constrained by the **Use Finish Date Scheduling** flag. If this schedule uses finish date scheduling, the task's left handle is enabled for dragging. If this schedule does not use finish date scheduling, the task's right handle is enabled for dragging.

6. Drag the left task handle to the left to change the start date, or drag the right task handle to the right to change the finish date, and release.

   The cursor changes to a bidirectional arrow during the move process.

Reschedule a schedule task

As a schedule coordinator, you can quickly reschedule a task in the Gantt chart by dragging the task to a new start time. This action does not change the duration of the task. The task's start and finish dates are automatically updated, as are any existing task dependencies.

Note:

You can also reschedule a task by editing the schedule task's planning properties on the **Overview** tab or on the **Information** panel in the Gantt view.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

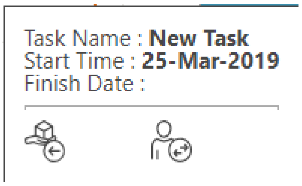
2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Select a schedule from the list, and click **Open** .

4. Click the **Gantt** tab.

5. Hover over the task that you want to modify.

   The task information appears and the task's connection points are displayed on either side of the task.



6. Click and drag the entire task to the desired location.

Move a schedule task up or down the task list

As a schedule coordinator, you can resequence a schedule's tasks by moving them up or down in the task list. This can be accomplished two ways:

- On the schedule's **Gantt** tab, drag a task to a new location and drop the task into place.
- On the schedule's **Task** tab, cut the task that you want to move, select the new spot within the list, and insert the task that you cut.

Navigate to the schedule

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.
2. (Optional) Filter the returned list to quickly find the desired schedule.
3. Click **Open**.
4. Either drag and drop the schedule tasks or cut and paste the tasks into the desired sequence.

Drag and drop

1. Click the **Gantt** tab.
2. In the Gantt tree, left click the task name and drag the task to the desired position within the tree and release.

Copy and paste the tasks

1. Click the **Tasks** tab.
2. In the task list, select the task that you want to move.
3. Click **Copy**.

4. Select the target location by selecting the task that will *follow* the task that you are moving and click **Paste**.

Update a schedule task's planning properties

As a schedule coordinator, you may need to update a schedule task's planning properties as work on the schedule progresses. Only schedule coordinators can update a schedule task's **Planning Properties** values. (A team member can update the task's **Execution Properties** values as they complete work on the task.) You can update properties on a single task, multiple tasks, and on the Information panel.

The selected display method (**Table**, **Table with summary**, **List with summary**) affects where you make the updates and how many schedule tasks you can update. To update a schedule task while in the **List** display method, use the **Information** panel, or open the schedule task and update the properties on the **Overview** tab.

Update properties on a single schedule task

You can also use the **Edit** **Start Edit** on the primary toolbar to update a schedule task's properties from the **Overview** tab within the open task.

1. Click **SCHEDULE TASKS** on your home page.

2. Click the task status tab, such as **Not Started** or **In Progress**, to locate the task. You can also select the task from the **Board** view.

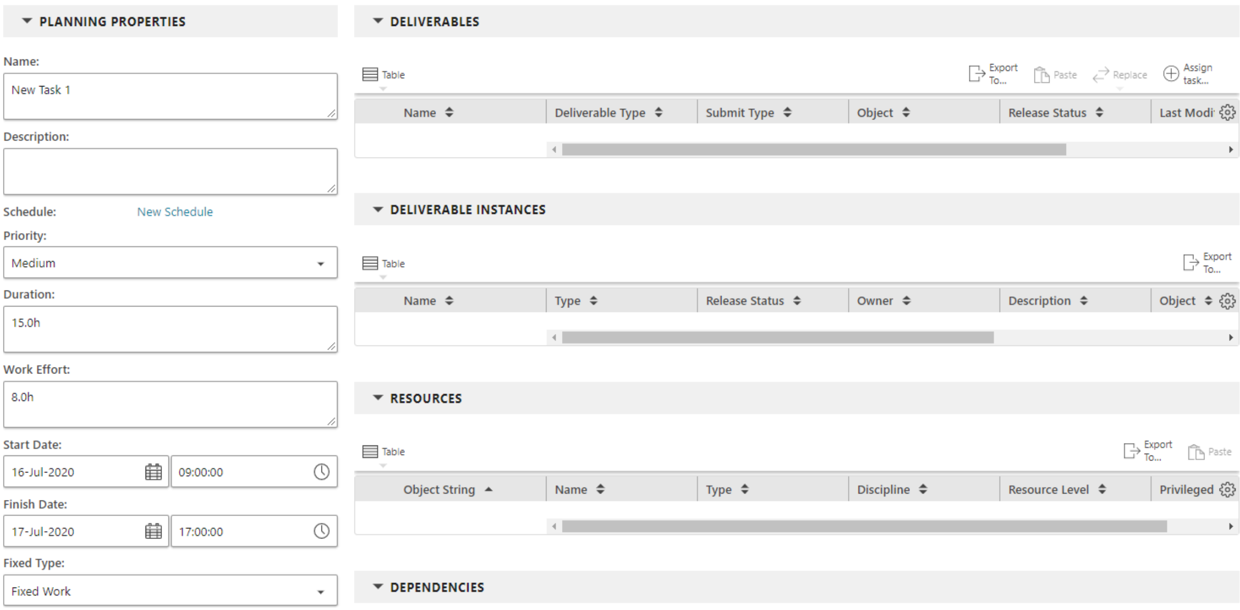
3. Select either the **List with summary** or **Table with summary** display method.

4. Select the desired schedule task from the list.

5. From the primary toolbar, click **Edit** **Start Edit**.

   If you are using the **Table with summary** display method, instead of selecting **Start Edit**, select either **Table** or **Summary**, depending on where you want to make edits. Selecting **Table** allows you to update certain properties on all schedule tasks, while selecting **Summary** allows you to update all properties on the selected schedule task.

6. Edit the schedule task's properties.



7. From the primary toolbar, click **Edit** > **Save Edits**.

Update properties on multiple schedule tasks

This display method enables you to update properties directly within the table. It's a convenient method to use to update properties on more than one schedule task.

1. Click **SCHEDULE TASKS** on your home page.

2. Select either the **Table** or the **Table with summary** display method.

3. Click **Edit** in the upper right corner of the view.

4. Edit the schedule task's properties in the table.

5. Click **Save** to save or cancel your edits.

Update a schedule task's properties in the Information panel

You can access the **Information** panel from within any display method or from within the Gantt view.

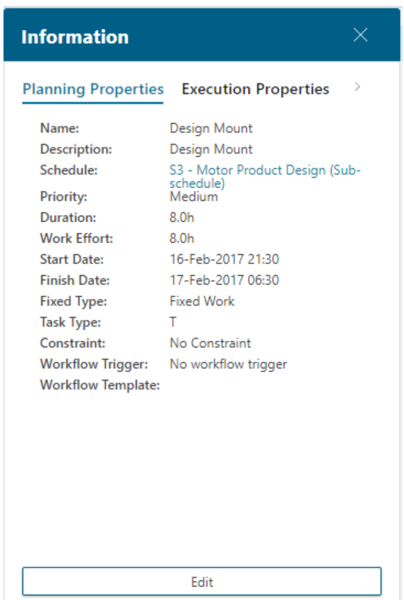
1. Do one of the following.

To	Do
Update the schedule task's properties from within the schedule task.	a. Click **SCHEDULE TASKS** on your home page.

To	Do
	b. Select the desired schedule task from the list.
Update the schedule task's properties from within the Gantt tab.	a. Click **SCHEDULES** on your home page. b. Select the desired schedule from the list. c. Click the **Gantt** tab d. Select the desired schedule task.

2. From the primary toolbar, click **Information** ⓘ.

3. In the **Information** panel, click **Edit**.



4. Edit the schedule task's properties.

   Click > to select from the various schedule task property types.

5. Click **Save**.

Add or remove affected items in a schedule task

Plan item schedules are schedules that are created in response to an engineering change notice (ECN) to address the work tasks, and the tasks' associated items, that are affected by the change.

Example:

A change notice is created to address a problem with a motor's operating temperature. The problem item is the motor housing and the impacted item is the cooling fin. A schedule task is created to design a solution. The motor housing is related to the schedule task as a problem item. The current revision of the cooling fin is related as an impacted item. The user executing the task revises the cooling fin to create the solution item. The user attaches the new revision to the schedule task as a solution item.

As a schedule coordinator, you can add affected items to a task in the following groups:

Solution Items

The new revisions or versions of the content that is to be released by this change.

Impacted Items

The old revision or version of the content being revised or replaced as part of the change.

Problem Items

The content causing the change.

Only schedules derived from an ECN have the **Affected Items** tab.

Navigate to the schedule task

1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule task.

3. Select a schedule task from the list and click **Open**.

4. Click the **Affected Items** tab.

5. Add an affected item to a schedule task or remove an affected item from a schedule task.

Add an affected item to a schedule task

1. Navigate to the schedule task.

2. Click **Add to** next to the desired affected item section.

3. In the **Add** panel, do one of the following:

To	Do
Search for an existing item.	a. Click the **Search** tab. b. Enter the search criteria and click . c. Select an item from the returned list.
Select an item that was previously copied to the paste buffer using **Copy** .	a. Click the **Palette** tab. b. Select an item from the **Clipboard** section.
Select a favorite or recently viewed item.	a. Click the **Palette** tab. b. Select an item from the **Favorites** or **Recent** section.
Add a new item.	a. Click the **New** tab. b. Do one of the following: • Click **Browse** to find a new item. • Select a recently used item from the **Recent** section. • Select an item type from the **Other** section, or search for an item type using the **Filter** box. c. Enter the properties for the new task. The properties vary depending on the type of task being created.

4. Click **Add**.

Remove an affected item from a schedule task

1. Navigate to the schedule task.
2. Select the affected item.
3. From the primary toolbar, click **Cut** .
4. (Optional) From the primary toolbar, click **Paste** to paste a deleted (cut) item into another section.

Managing schedule tasks

Assign schedule tasks to a project

As a schedule coordinator, you can assign a schedule task to one or more Teamcenter projects.

1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule task.

3. Select a schedule task from the list.

4. (Optional) Do one of the following:

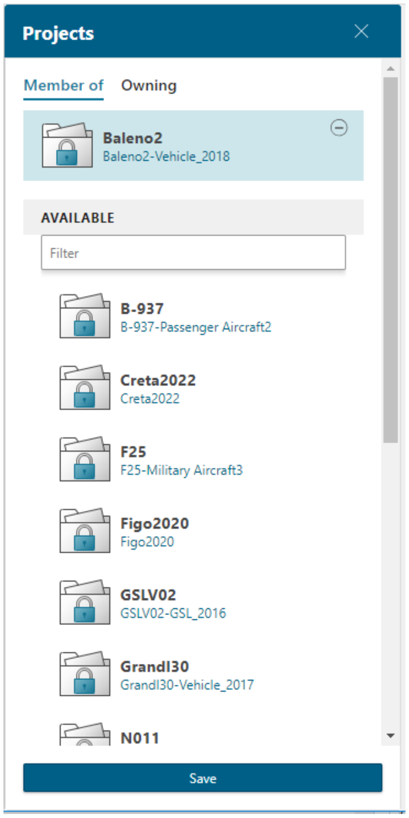
   - Click **Open** to complete this task from within the open schedule task.

   - Click the **Gantt** tab to complete this task in the Gantt view.

5. From the primary toolbar, click **Manage** > **Projects**.

   > Note:
   >
   > This feature is available only if a security-level project has been defined in Teamcenter.

6. In the **Projects** panel, hover over a project listed under the **Available** heading and click **Add Project**, which appears next to the project you are hovering over.



7. (Optional) To remove the schedule task from a project, hover over a project under the **Member of** heading, and click **Remove Project** ⊖.

8. Click **Save**.

Compare schedule task planning properties

As a schedule coordinator, you can compare the planning properties for multiple schedule tasks.

> Note:
>
> You can compare common properties for other selected objects, such as schedules or schedule members, by selecting the **Compare** display mode available in many Active Workspace pages.

1. Click **SCHEDULE TASKS** on your home page.

2. (Optional) Filter the returned list to quickly find the desired schedule tasks or use the tabs across the top to view your tasks by status.

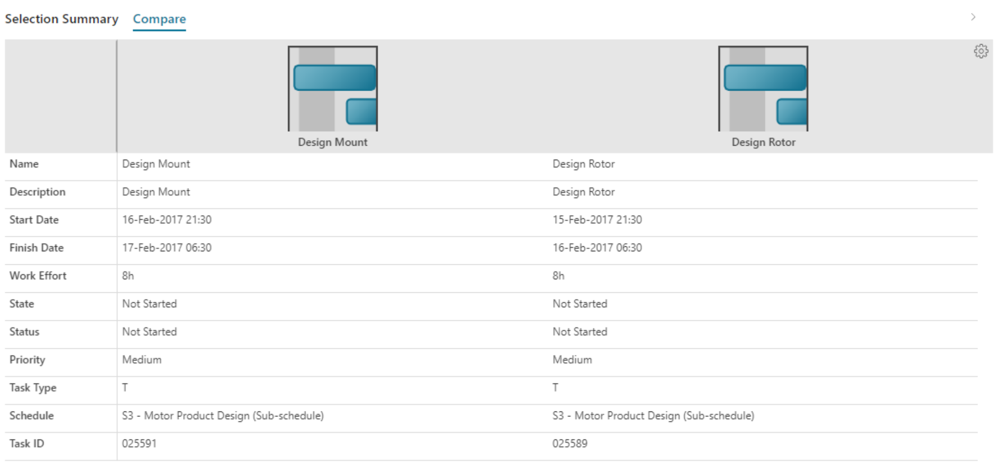
3. Select the **Table with Summary** display method.

4. Click **Selection Mode** to enable multiselect mode.

5. Click the schedule tasks you want to compare.

6. Click the **Compare** tab.

7. Review and compare the **Planning** properties for the selected schedule tasks.



	Design Mount	Design Rotor
Name	Design Mount	Design Rotor
Description	Design Mount	Design Rotor
Start Date	16-Feb-2017 21:30	15-Feb-2017 21:30
Finish Date	17-Feb-2017 06:30	16-Feb-2017 06:30
Work Effort	8h	8h
State	Not Started	Not Started
Status	Not Started	Not Started
Priority	Medium	Medium
Task Type	T	T
Schedule	S3 - Motor Product Design (Sub-schedule)	S3 - Motor Product Design (Sub-schedule)
Task ID	025591	025589

Move a schedule task between schedules

You can move a schedule task from one schedule to another schedule by cutting the task from the first schedule and inserting it into the second schedule.

> Note:
>
> Task dependencies and task deliverables are not maintained when moving a task between two different schedules.

1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Click **Open**.

4. Click the **Tasks** tab.

5. Select the task that you want to move.

6. From the primary toolbar, click **Cut**.

7. Search for the schedule that you want to move the task to using the search box, or navigate to it in your folder structure.

8. Click **Open**.

9. Click the **Tasks** tab.

10. Select a task from the table.

    Active Workspace inserts the task above the selected task.

11. Click > **Add Schedule Task** and select the cut task from the **Recents** section.

Create summary and subtasks

Schedule coordinators can create summary and subtasks by indenting a task underneath another task, creating a parent/child relationship.

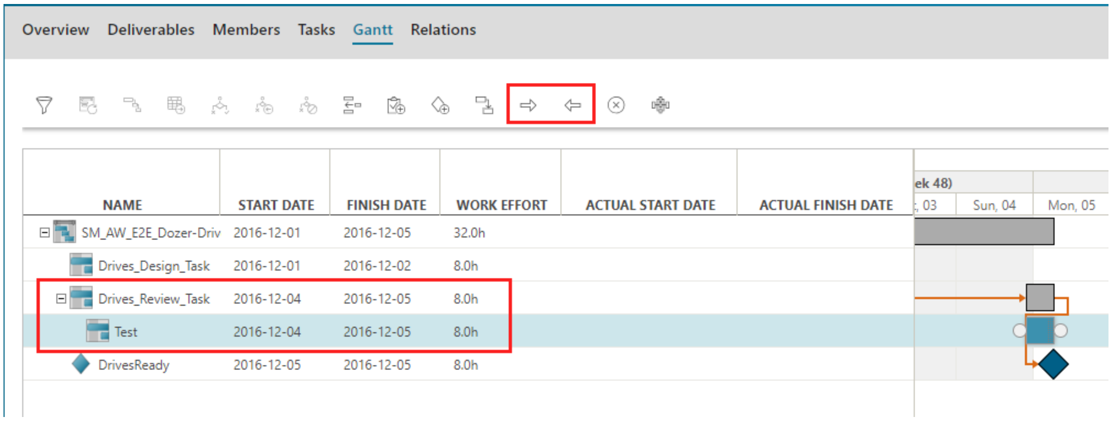
1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Click the **Gantt** tab.

4. Do one of the following.

To	Do
Create a subtask.	Select the target task from the list and from the work area toolbar, click **Indent Task** ⇨, or right-click the target task and select **Indent Task**. The task becomes a child (or subtask) of the task above it. Note: Click + next to the parent task to see the indented child task.
Create a summary task.	Select a child (or subtask) from the list, and from the work area toolbar, click **Outdent Task** ⇦, or right-click the child task and select **Outdent Task**. The subtask becomes a summary task and is no longer a child of a parent task. The task becomes a summary task and is left-justified.



Creating and managing schedule task dependencies

What is a schedule task dependency?

A dependency link is the required order of completion between two tasks within the same schedule, between tasks in a master and subschedule, or between tasks in two different schedules. The schedule coordinator defines the type of dependency, such as start-to-start or start-to-finish, and the desired lag time to ensure correct completion sequencing.

Example:

You create a task dependency so that the **Install Compressor** task is dependent on the completion of the prior **Uninstall Compressor** task with a lag time of two weeks. The first task (uninstall compressor) must be completed before the start of the second (install compressor), and the second task can't begin until two weeks after the first task is completed. This is an example of a finish-to-start dependency.

View task dependencies

Follow this procedure to view dependencies between tasks. A dependency between two tasks links their required order of completion.

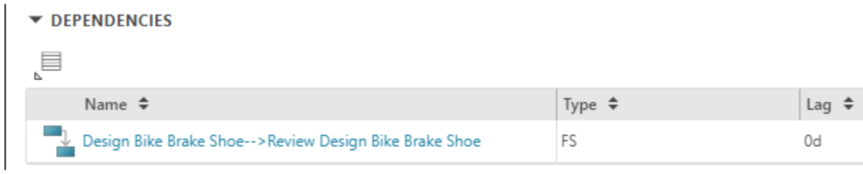
1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule task.

3. Select a schedule task from the list, and click **Open**.

4. From the **DEPENDENCIES** section of the task properties, select the dependency you want to view.

5. Click **Open** to view the dependency details.



Define or remove a dependency between two schedule tasks

A schedule coordinator can create dependencies between schedule tasks, which ensures that the tasks are completed in the required order.

When creating schedule dependencies:

- Between tasks within the same schedule—use either the **Tasks** tab or the **Gantt** tab.
- Between tasks with a master—subschedule relationship—use either the **Tasks** tab or the **Gantt** tab.
- Between tasks in two different schedules—use the **Tasks** tab.

> Note:
>
> When you define a dependency between tasks in different schedules, the original task is automatically added to the schedule as a proxy task. As changes are made to the original task, the proxy task automatically updates to reflect those changes.

Navigate to the schedule

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.
2. (Optional) Filter the returned list to quickly find the desired schedule.
3. Select the desired schedule and click **Open**.
4. Define a task dependency or remove a task dependency.

Define a task dependency

Do one of the following.

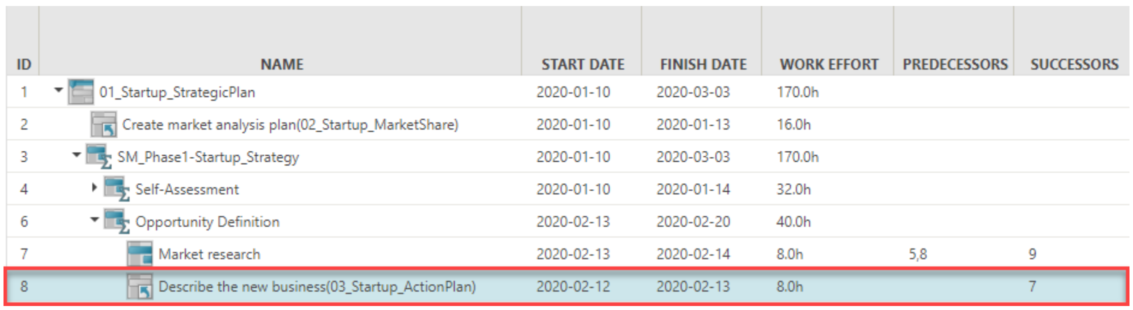
To	Do
Define a task dependency using the **Tasks** tab.	1. Click the **Tasks** tab. 2. Select the target task from the list and from the primary toolbar, click **Copy**.

To	Do

> Note:
>
> You can create multiple dependencies to one task. When you copy a task it remains on the clipboard for reuse until you copy a new task.

3. If you are creating a dependency to a task in another schedule, navigate to the desired schedule and click the **Tasks** tab.

4. Select the task that you want to create the dependency with and from the primary toolbar, click **New** > **Create Dependency**.
   The target task is added to the selected task as a proxy task. The name of the schedule containing the target task is displayed next to the proxy task name.



ID	NAME	START DATE	FINISH DATE	WORK EFFORT	PREDECESSORS	SUCCESSORS
1	01_Startup_StrategicPlan	2020-01-10	2020-03-03	170.0h		
2	Create market analysis plan(02_Startup_MarketShare)	2020-01-10	2020-01-13	16.0h		
3	SM_Phase1-Startup_Strategy	2020-01-10	2020-03-03	170.0h		
4	Self-Assessment	2020-01-10	2020-01-14	32.0h		
6	Opportunity Definition	2020-02-13	2020-02-20	40.0h		
7	Market research	2020-02-13	2020-02-14	8.0h	5,8	9
8	Describe the new business(03_Startup_ActionPlan)	2020-02-12	2020-02-13	8.0h		7

Define a task dependency from the Gantt tasks table.

1. Click the **Gantt** tab.

2. From the list of tasks, select the task that you want to define the dependency for.

3. Navigate to the appropriate table cell in the **Predecessor** or **Successor** columns and double-click it to put the cell into edit mode.

   - If the selected task is dependent on another task, double-click the **Predecessor** column cell.

   - If another task is dependent on the selected task, double-click the **Successor** column cell.

4. Enter the dependency into the table cell in the following format:

   - *<Task Row ID>[Dependency Type][+/- Lag]*

     - The *Task Row ID* is the number displayed in the **ID** column next to the task name.

     - The *Dependency Type* defines the type of task dependency, such as **FS** (finish-to-start) or **SS** (start-to-finish). The default value for the type is **FS**.

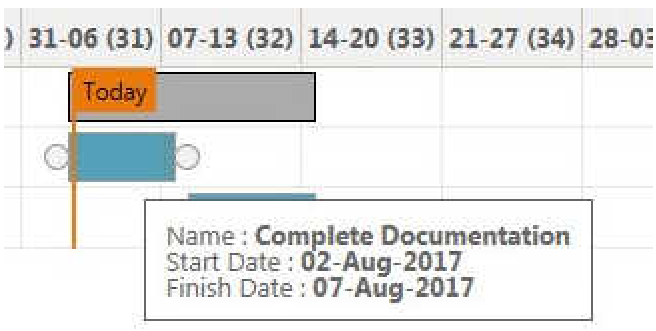
<table>
<tr><th>To</th><th>Do</th></tr>
<tr><td></td><td>

- The *Lag* defines the amount of time between each task. Use **+** when you want the lag time to be after the lag type, or use **-** when you want it to be before.
- See *Field definitions for task dependencies* for a list of all valid values for the dependency type and lag.

For example, if you select a task that you want to be dependent on the 5th task in the table with a lag time of ten days, you enter **5FS+10d** in the **Predecessor** cell for the selected task.

</td></tr>
<tr><td>Define a task dependency using the Gantt tab.</td><td>

1. Click the **Gantt** tab.
2. Hover over the target task. The task information is displayed, and the task's connection points appear on either side of the task.

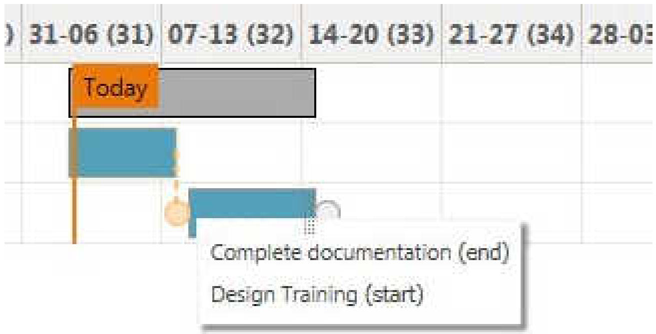


3. Drag and drop either the left task handle or the right task handle to the left or right task handle of the second task. The task handle you select to drag on the first task and where you select to drop on the second task determines the dependency type.
The following applies:

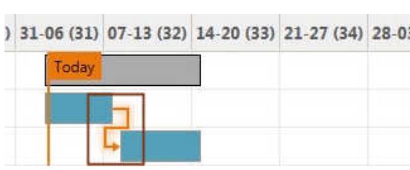
- Dragging from the left side of the first task to the right side of the second task creates a **Start to Finish** task.
- Dragging from the left side of the first task to the left side of the second task creates a **Start to Start** task.
- Dragging from the right side of the first task to the left side of the second task creates a **Finish to Start** task.
- Dragging from the right side of the first task to the right side of the second task creates a **Finish to Finish** task.

A dashed line connects the two tasks.

</td></tr>
</table>

To	Do
	

Remove a task dependency

To	Do
Remove a task dependency using the **Tasks** tab.	1. Click the **Tasks** tab. 2. Select a task from the list and click **Open**. 3. In the **DEPENDENCIES** section, select the dependency from the list and from the primary toolbar, click **Edit** **Delete Dependency**. The dependency between the tasks is removed. Note: The proxy task is still displayed in the **Tasks** tab and **Gantt** view for the schedule. You must manually delete the proxy task to remove it from the schedule.
Remove a task dependency using the **Gantt** tab.	1. Click the **Gantt** tab to see your task dependencies.  2. Do one of the following: • Double-click the dependency link that you want to remove and then click **Delete** on the message that appears.

To	Do
	• Select the dependency link you want to remove and then click **Delete** from the Gantt toolbar.

Modify a schedule task dependency

Follow this procedure to modify the **Type** and **Lag** dependency values. You can modify the schedule task dependency from the **DEPENDENCIES** section of the task properties, or from the schedule's **Gantt** tab—whichever view you prefer.

Update task dependencies from the Dependencies tab

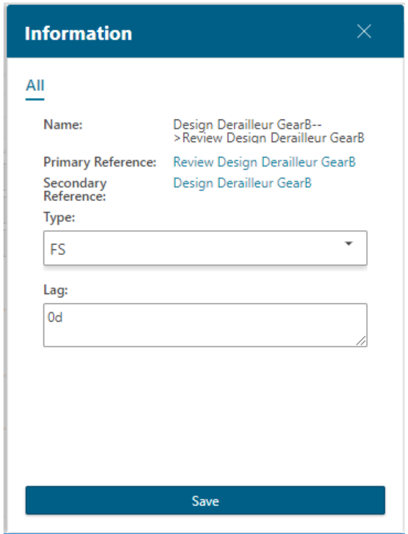
1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.
2. (Optional) Filter the returned list to quickly find the desired schedule task.
3. Select a schedule task from the list and click **Open**.
4. From the **DEPENDENCIES** section, select the desired dependency.
5. From the primary toolbar, click **Edit** > **Start Edit**.
6. Update the **Type** and **Lag** values.
7. From the primary toolbar, click **Edit** > **Save Edits**.

Update task dependencies from the Gantt tab

1. Search for the schedule using the search box, click **SCHEDULE** on your home page, or navigate to the schedule in your folder structure.
2. (Optional) Filter the returned list to quickly find the desired schedule.
3. Select a schedule from the list, and click **Open**.
4. Click the **Gantt** tab and select the desired dependency link.

   The link is not highlighted after you click it.
5. Click **Information**.
6. In the **Information** panel, click **Edit**.

7. Update the **Type** and **Lag** values.



8. Click **Save**.

Field definitions for task dependencies

As a schedule coordinator, you can define the following values when setting a dependency between two schedule tasks.

Field name	Definition	Valid values
Type	Identifies the activity sequence between two tasks.	**SS** Start-to-start. (Predecessor must start before successor can start.) **FS** Finish-to-start. (Predecessor must finish before successor can start.) **SF** Start-to-finish. (Predecessor must start before successor can finish.) **FF** Finish-to-finish. (Predecessor must finish before successor can finish.)
Lag	Specifies the delay (in days) between when the first task ends and second task starts. You can specify the lag time in weeks, days, or hours by adding the **w**, **d**, or **h** suffix to	Enter a numerical value and optional suffix value.

Field name	Definition	Valid values
	the value. You can also enter decimal values. Regardless of the specified suffix, the value is converted and displayed in days.	

Using workflows with schedule tasks

What are schedule task workflows?

As a schedule coordinator, you can configure a schedule task so that when certain conditions are met, the associated workflow is initiated. The triggering rules or conditions create a workflow process. If there are updates to the workflow process tasks, a notification is sent to the schedule task so that the schedule task can be updated.

If a schedule is unpublished (not accessible to other users) or is a template, workflow triggers are not processed, the workflows are not processed, and the workflows do not appear in the user's inbox. Only schedules that are published and not templates start workflows.

You can also manually submit a schedule task to a workflow, if desired.

View the schedule task workflow

As the schedule coordinator or schedule team member, you can view a schedule task to see where it is within the workflow process.

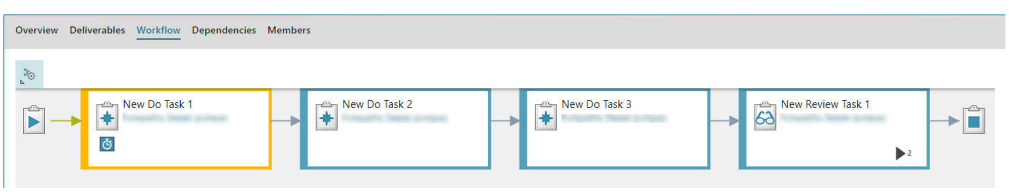
1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule task.

3. Select a schedule task from the list and click **Open** .

4. Click the **Workflow** tab.

   The task is displayed within the workflow.

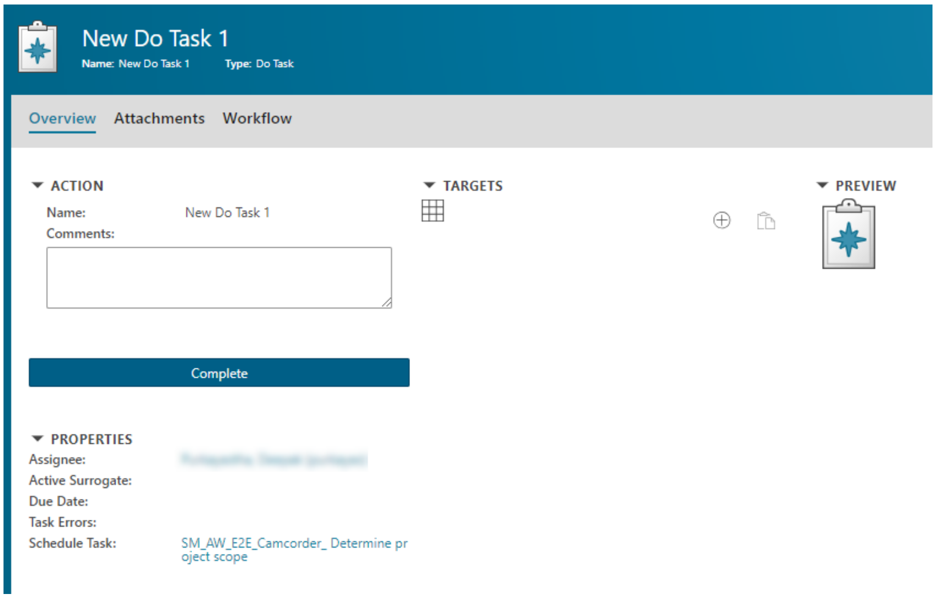


Access a schedule task from a workflow task

As a schedule team member, you can access the schedule task from the workflow task in your inbox.

1. Click **INBOX** on your Active Workspace home page.

2. Click **Open** on the desired workflow task.



Assign a workflow process to a schedule task

As the schedule coordinator, you can assign a workflow to a schedule task by setting the workflow template and workflow trigger, and identifying the privileged user and workflow owner. On a workflow task, work is performed after the workflow starts and the privileged user controls where the workflow goes upon launch. You assign a privileged user only for schedule tasks that have associated workflow templates.

A workflow owner is the user who initiates the workflow process. When the workflow process is initiated, the workflow owner becomes the responsible party for the workflow process; the root task of the workflow process is placed in the process owner's worklist. By default, the workflow owner is the creator of the schedule task, but you can reassign a different owner when you assign the task to the workflow.

Note:

By default, the schedule coordinator cannot change the users assigned to the schedule task once the workflow is in process. You or your system administrator can set the **SM_ALLOW_WKFLOW_SCH_TASK_RESOURCE_UPDATE** preference to **True** to allow the schedule coordinator to change the assigned users for a schedule task that has started the workflow process.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

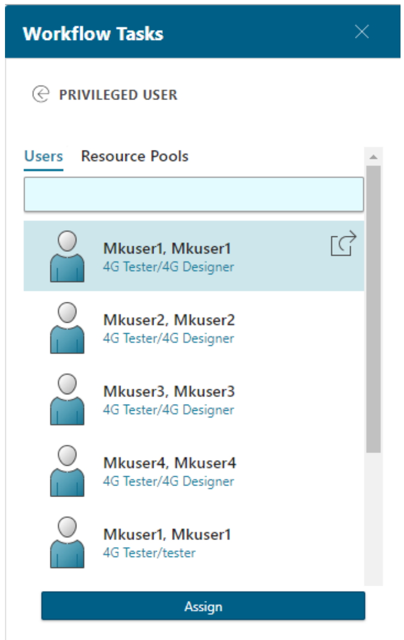
3. Select a schedule from the list and click **Open**.

4. Click the **Gantt** tab and select a task from the list.

5. From the Work area toolbar, click **Workflow Tasks**.

6. On the **Workflow Tasks** panel, do the following.

To	Do
Assign a workflow template and workflow trigger.	Select values from the **Workflow Template** and **Workflow Trigger** dropdown lists. Note: The **Workflow Template** and **Workflow Triggers** can also be defined on the **Overview** tab on the schedule task.
(Optional) Assign a privileged user.	a. Click **Add Privileged User**. b. (Optional) Click the **Resource Pools** tab if you want to assign a resource pool as the privileged user. c. (Optional) Use the **Filter** box to filter the list for the desired user or resource pool name. d. From the **Privileged User** list, select a user or resource pool. e. Click **Assign**.

<table>
<tr><th>To</th><th>Do</th></tr>
<tr><td></td><td>


Note:

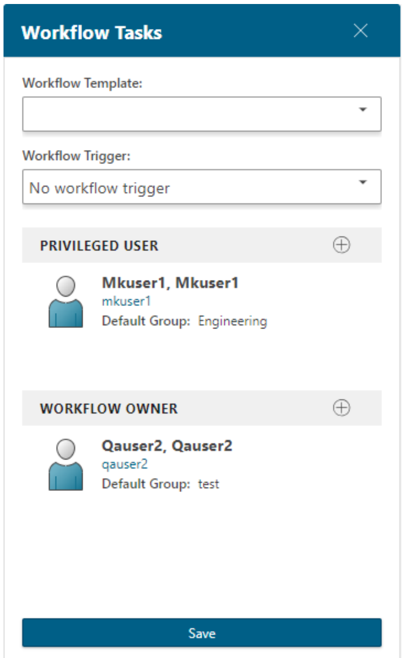
If you do not assign a privileged user to the workflow task, the user or resource pool assigned to the schedule task becomes the privileged user for the workflow task.
</td></tr>
<tr><td>(Optional) Change the workflow owner.</td><td>
a. Click Add Workflow Owner ⊕.

b. (Optional) Use the Filter box to filter the list for the desired user name.

c. From the Workflow Owner list, select a user.

d. Click Assign.
</td></tr>
</table>

7. Click **Save**.



Manually submit a schedule task to a workflow

While most schedule tasks are automatically submitted to workflow, there may be occasions when you want to manually submit the task without waiting for the workflow to trigger. As the schedule coordinator, you can manually launch a schedule task into a workflow from either the **Task** or **Gantt** tab, whichever view you prefer.

> Note:
>
> The schedule task must have an associated workflow template in order to be manually submitted.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.
2. (Optional) Filter the returned list to quickly find the desired schedule.
3. Select a schedule from the list and click **Open** .
4. Select either the **Tasks** or **Gantt** tab.
5. Select the schedule task from the list.
6. From the primary toolbar, click **Manage** > **Launch Workflow**.
7. Click **Yes** on the message that is displayed.

10. Using trace links with schedule objects

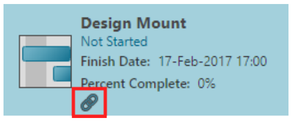
Use trace links to manage schedule objects

Use *trace links* to allocate requirements to schedule objects, such as schedules, schedule tasks, and deliverables.

A trace link is a directional relationship conveyed by the terms *defining* (start) and *complying* (end). A defining object specifies a condition that a product or a component must fulfill. A complying object must partially or completely fulfill a condition specified by a defining object. Such a relationship establishes a traceable path in which one object precedes another.

Trace links can have a one-to-many relationship. For example, one schedule task can be linked to several requirements or vice versa.

Objects that have associated trace links display the trace link icon as in the example, below:



> Note:
>
> When a change occurs in the linked requirement, the trace link icon turns red, indicating that the requirement has been modified.

Use the trace link functionality to do the following:

- Start a trace link on a requirement and end the trace link on a schedule object.
- Start a trace link on a schedule object end the trace link on a requirement.
- Generate and view traceability reports.

You can use the following process to allocate requirements to schedule tasks using trace links, and then manage and track the requirements review process and approval in Schedule Manager.

Step	User Action
1	Create a trace link between a requirement and a schedule task.
2	Assign the Requirement Signoff workflow template to a schedule task.

Step	User Action
3	Create predecessor tasks to the workflow task.
4	Complete the predecessor tasks and update the task properties. This action triggers the workflow specified in step 2.
5	Execute the sign-off process by the sign-off team to verify the requirements are complete.

Create a trace link for a schedule object

As a schedule coordinator, you can create a trace link between schedule objects, such as schedules, schedule tasks, and deliverables and a requirement. This can be a one-to-many relationship.

1. Search for the schedule object using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the object in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired object.

3. Click **Open**.

4. On the primary toolbar, click **New** > **Trace Link**.

   The **Create Trace Link** panel is displayed and the open object is displayed in the **Start** position of the trace link.

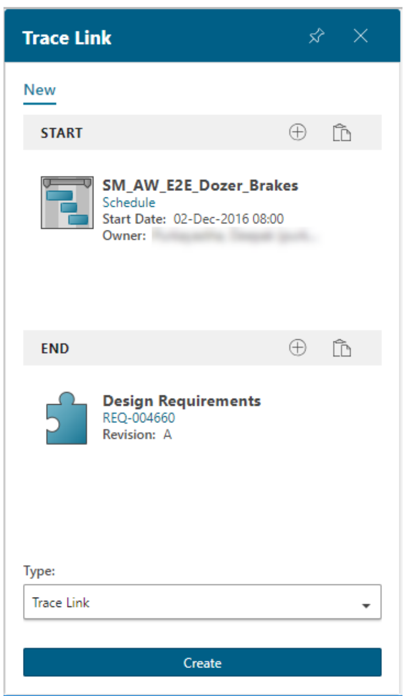
5. On the **Create Trace Link** panel, do the following.

To	Do
(Optional) Define the directional relationship.	Drag and drop the schedule object (or requirement after it is added) under **Start** or **End**.
Add the linking requirement.	Click **Add** under **Start** or **End**, depending on the desired directional relationship of the requirement, and do one of the following: • On the **Search** tab, search for a requirement. • On the **Palette** tab, expand: • **Clipboard** to select a requirement that was previously copied to the paste buffer using **Copy**.

To	Do
	Note: If there is content in your past buffer, the **Paste** icon displays next to **Start** and **End**. • **Favorites** or **Recent** to select a favorite or recently viewed requirement.
(Optional) Remove a requirement or task from the list.	Click **Remove**.

6. In the **Type** box, select **Trace Link**.

7. Click **Create**.



Review existing trace links

As a team member, you can review an object's existing trace link details to verify and access the requirements that comprise the trace link.

The trace link directionality is indicated by ↗ for defining and ↙ for complying.

1. Search for the schedule object using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the object in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired object.

3. Click **Open**.

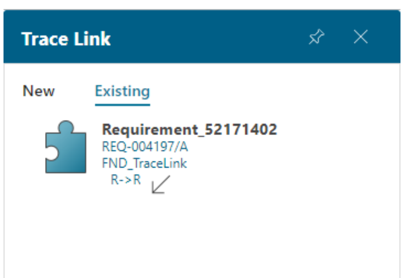
4. On the primary toolbar, click **New** > **Trace Link**.

5. On the **Create Trace Link** panel, click the **Existing** tab.

   Review the existing trace link relationships.

6. (Optional) Do one of the following.

To	Do
Remove a trace link.	Click **Remove**.
Open a trace link.	Click **Open**.



Generate a traceability report

As a team member, you can generate a traceability report in Excel to review the details of the trace links associated with the selected object.

1. Search for the schedule object using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the object in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired object.

3. Click **Open**.

4. On the primary toolbar, click **New** > **Generate Report**.

5. On the **Generate Report** panel, select the **TL Complying and Defining Report**.

6. Under Format, select the desired style sheet, either **REQ_TraceLink_complying_template** or **REQ_TraceLink_defining_template**.

7. Click **Generate**.

8. To open the report in Excel, click **Open** on the message that displays.

11. Managing deliverables

What are deliverables and deliverable instances?

Schedules and schedule tasks generally have one or more deliverables, such as define design requirements or complete part redesign. Deliverables can have associated deliverable *instances*, such as a part, CAD drawing, or file. Deliverables are the *containers* for the actual instances of work that are delivered to your internal or external customer.

Schedule coordinators add the required deliverables to the schedules and schedule tasks. The coordinator can choose to add the deliverable instance when they create the deliverable, or they can simply create the deliverable as a placeholder for the actual deliverable instance, which can be added later. If a schedule team member is assigned to complete a schedule task, the team member can add or delete the deliverable instance as work on the deliverable commences.

When you create a schedule task deliverable, Teamcenter automatically adds the deliverable to the schedule.

> Example:
>
> In an automotive manufacturing company, a typical schedule deliverable that would be shared across many projects is **complete the engine CAD drawing**. The actual CAD drawing file (the deliverable instance) associated with the deliverable would be different for each project schedule.

Managing schedule deliverables

View schedule deliverables

As a schedule coordinator, you can view the deliverables associated with the selected schedule. This page shows both the schedule deliverables and the rolled up schedule task deliverables. Schedule task deliverables are rolled up and display on the schedule's **Deliverable** tab when you add a deliverable instance to the schedule task deliverable.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Select the desired schedule and click **Open**.

4. In the **DELIVERABLES** section, review the schedule deliverables and the rolled-up task deliverables for the selected schedule.

   Rolled-up schedule task deliverables are prefixed with **sd_**.

Add or remove a schedule deliverable

As a schedule coordinator, you can add a deliverable to a schedule or remove a deliverable from a schedule. Deliverables are the containers for the actual instance of the object, such as a file, part, or drawing, that is delivered to your internal or external customer. You can add a deliverable instance to your schedule deliverable after you have created the deliverable.

> Note:
>
> Removing a schedule deliverable does not delete the deliverable from Teamcenter. It simply deletes the relationship between the deliverable and the schedule.

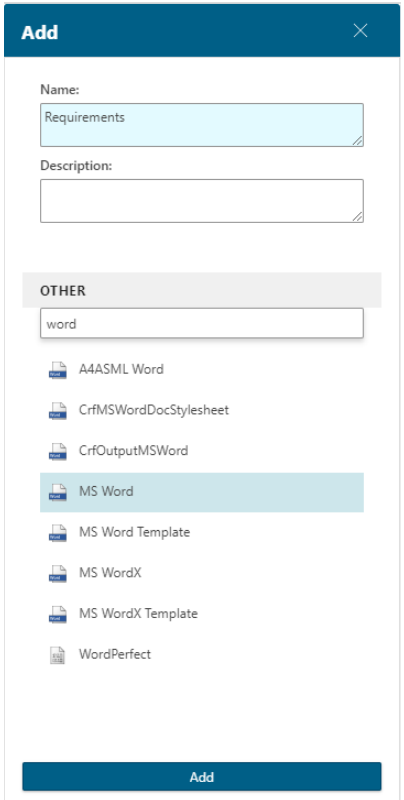
Navigate to the schedule

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.
2. (Optional) Filter the returned list of schedules to find the desired schedule.
3. Click **Open** on the desired schedule.

   The **DELIVERABLES** section displays all existing deliverables.
4. Add a deliverable to a schedule or remove a deliverable from a schedule.

Add a schedule deliverable

1. On the primary toolbar, click **New** > **Add Deliverable**.



2. In the **Add** panel, enter the deliverable name and select the deliverable type. Optionally, enter a description for this deliverable.

3. Click **Add**.

Remove a schedule deliverable

1. Select a schedule deliverable from the list of deliverables.

2. From the primary toolbar, click **Edit** **Remove Deliverable**.

3. On the message that displays, click **Remove**.

Add or remove a schedule deliverable instance

As a schedule coordinator, you can add a deliverable instance, such as a file, part, or drawing, to an existing schedule deliverable (container).

> Note:
>
> Removing a schedule deliverable instance does not delete the instance from Teamcenter. It simply deletes the relationship between the instance and the schedule deliverable.

Navigate to the schedule

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list of schedules to find the desired schedule.

3. Click **Open** on the desired schedule.

   The **DELIVERABLES** section displays all existing deliverables.

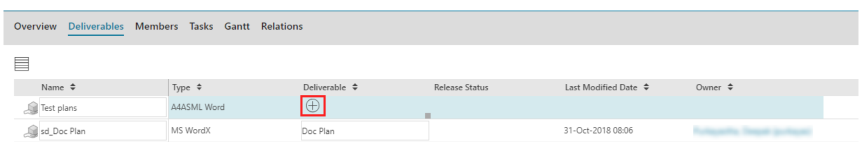
4. Add an instance to a schedule deliverable or remove an instance from a schedule deliverable.

Add a schedule deliverable instance

1. Select the deliverable from the list.

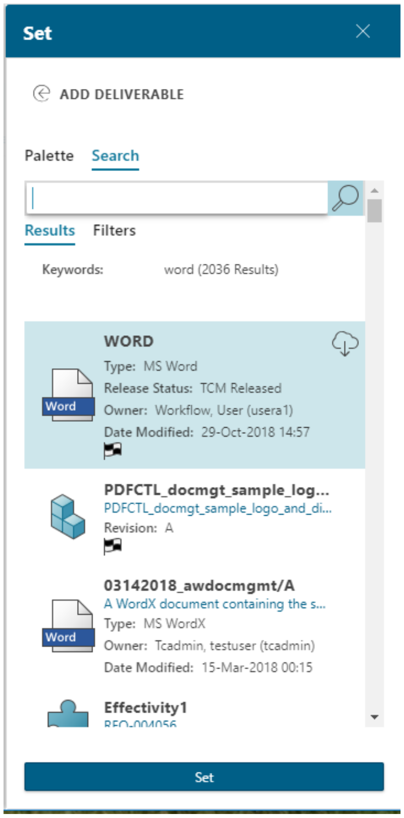
2. From the primary toolbar, click **Edit** **Start Edit**.

3. Click the **Add** command that appears in the empty **Deliverable** box.



4. In the **Set** panel, do one of the following:

To	Do
Search for an existing deliverable instance.	a. Click the **Search** tab. b. Enter the search criteria and click . c. Select an deliverable instance from the returned list.
Select a deliverable instance that was previously copied to the paste buffer using **Copy** .	a. Click the **Palette** tab. b. Select a deliverable instance from the **Clipboard** section.
Select a favorite or recently viewed deliverable instance.	a. Click the **Palette** tab. b. Select a deliverable instance from the **Favorites** or **Recent** section.



5. Click **Set**.

6. From the primary toolbar, click **Edit** **Save Edits**.

Remove a schedule deliverable instance

1. Select the deliverable from the list.

2. From the primary toolbar, click **Edit** **Start Edit**.

3. Click the delete command that appears in the **Deliverable** box.

4. From the primary toolbar, click **Edit** **Save Edits**.

Assign a schedule deliverable to a schedule task

As a schedule coordinator, you can assign an existing schedule deliverable to a schedule task. Typically, you assign a schedule deliverable to the schedule task that was created to ensure completion of the schedule deliverable.

You cannot assign a master schedule deliverable to a subschedule task.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Select a schedule from the list and click **Open**.

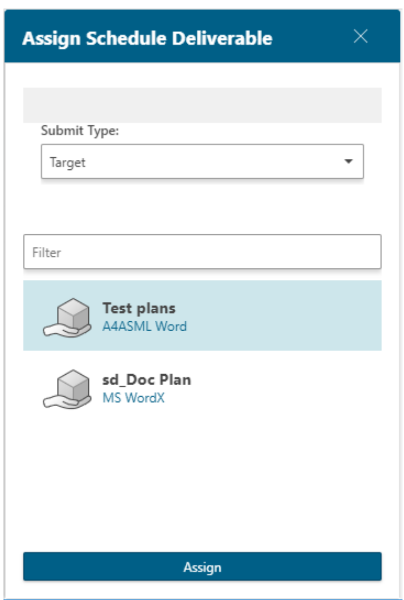
4. Click the **Tasks** tab.

5. Select a task from the list and from the primary toolbar click **Manage** > **Assign schedule deliverable**.

6. On the **Assign Schedule Deliverable** panel, use the **Submit Type** dropdown to specify the type of task.

   - **Target** — Attach the deliverable as a target attachment, such as a drawing, to the task workflow.
   - **Reference** — Attach the deliverable as a reference attachment, such as a specification document, to the task workflow.
   - **Do not submit** — No deliverable is attached to the task workflow.

7. Select a schedule deliverable from the list and click **Assign**.



The schedule deliverable appears in the **Task Deliverables** column on the schedule tasks table and on the schedule task's **Deliverable** tab.

View the schedule tasks for a schedule deliverable

As a schedule coordinator, you can view the schedule tasks associated with the selected schedule deliverable.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

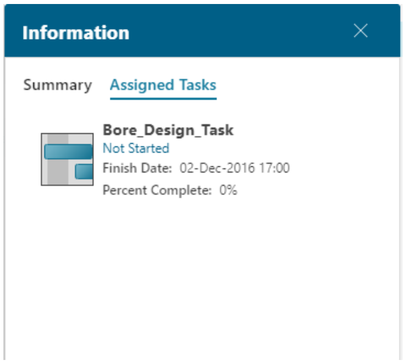
2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Select the desired schedule and click **Open**.

   The **DELIVERABLES** section displays all existing deliverables.

4. Select a schedule deliverable from the list and click **Information**.

5. In the **Information** panel, click > and select the **Assigned Tasks** heading.



Replace a schedule deliverable instance

As a team member, you may be required to replace a deliverable instance on a schedule deliverable that your schedule coordinator created. Deliverable instances are parts, drawings, or files that are associated with a schedule deliverable. For example, you may need to replace an outdated drawing with a current drawing.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list of schedules to find the desired schedule.

3. Select a schedule from the list and click **Open**.

   The **DELIVERABLES** section displays all existing deliverables.

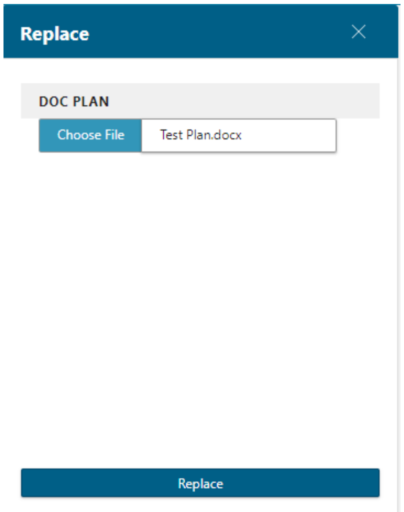
4. Select a schedule deliverable from the list and click **Open**.

5. From the primary toolbar, click **Edit** > **Replace File**.

6. On the **Replace** panel, do the following.

a. Click **Choose File** to navigate to and select the desired file.

b. Click **Replace**.



Open a schedule deliverable instance

As a schedule team member, to complete a schedule deliverable you may need to open and update an associated deliverable instance, such as a CAD drawing, part, or Microsoft Word file.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Select a schedule from the list and click **Open**.

   The **DELIVERABLES** section displays all existing deliverables.

4. Select the deliverable and click **Open** to open the instance.

   You can select to open the instance in a new window or new tab.

5. Click **Edit** > **Checkout** to check out the instance before making changes.

6. Click **Open** > **Download**.

   The downloaded instance displays at the bottom of the screen. Click to open.

7. After you complete your work on this deliverable instance, save it to Teamcenter to capture your changes.

8. Click **Edit** > **Checkin** to check in the instance after making changes.

Edit schedule deliverable instance properties

As a schedule coordinator or team member, you may need to update a schedule deliverable instance's properties after the instance is added to the deliverable.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to find the desired schedule.

3. Select a schedule from the list and click **Open**.

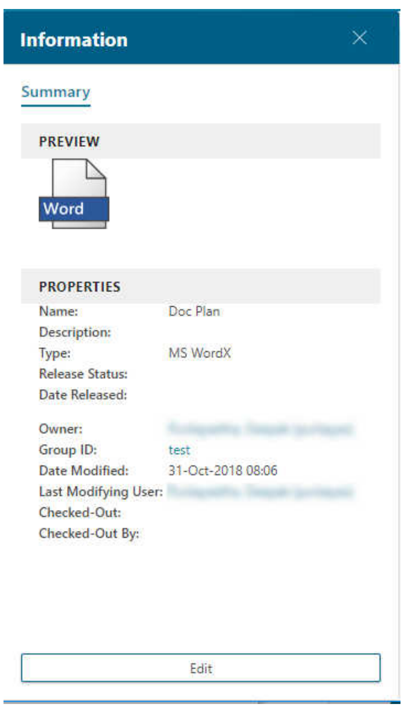
   The **DELIVERABLES** section displays all existing deliverables.

4. Select a deliverable from the list and click **Open** (you can choose to open in a new window or tab).

5. In the primary toolbar, click **Information**.

6. In the **Information** panel, click **Edit**.

7. Edit the deliverable instance's properties.



8. Click **Save**.

Managing schedule task deliverables

View the schedule task deliverables

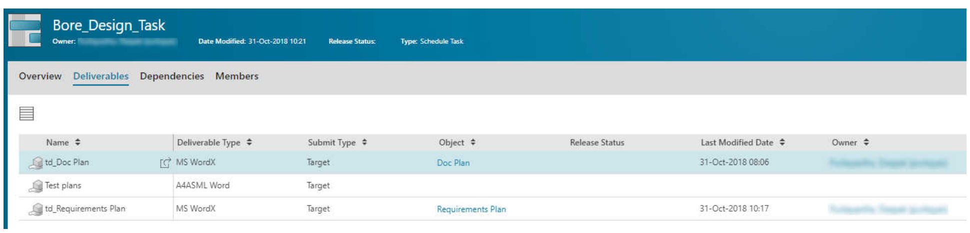
As a schedule coordinator or team member, you can view the deliverables associated with the selected schedule task.

1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule task.

3. Select the desired schedule task and click **Open**.

4. Click the **Deliverables** tab to review the deliverables for this schedule task.



Assign a task deliverable to a schedule task

As a schedule member, you can assign a task deliverable to one or more schedule tasks.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Select a schedule from the list and click **Open**.

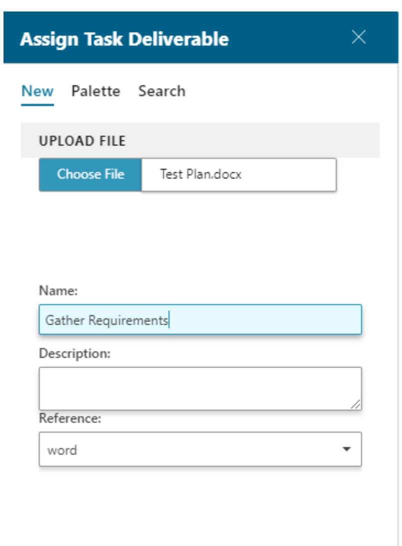
4. Click the **Tasks** tab.

5. Select a task from the list, or use multiselect mode to select multiple tasks, and click **Manage** **Assign task deliverable**.

6. On the **Assign Task Deliverable** panel, do one of the following.

To	Do
Search for an existing deliverable.	a. Click the **Search** tab. b. Enter the search criteria and click . c. Select a deliverable from the returned list.
Select a deliverable that was previously copied to the paste buffer using **Copy** .	a. Click the **Palette** tab. b. Select a deliverable from the **Clipboard** section.
Select a favorite or recently viewed deliverable.	a. Click the **Palette** tab. b. Select a deliverable from the **Favorites** or **Recent** section. c. Enter the properties for the new deliverable. The properties vary depending on the type of deliverable being created.
Add a new deliverable and assign the deliverable instance to the deliverable, for example, a PDF file or Word document.	a. Click the **New** tab. b. Click **Choose File** to find and associate a deliverable instance with the new deliverable you are creating. c. Enter the properties for the new deliverable. The properties vary depending on the type of deliverable being created.

7. Click **Assign**.



The schedule deliverable appears in the **Task Deliverables** column on the schedule tasks table, on the schedule task's **Deliverable** tab, and it rolls up as schedule deliverable and is appears on the schedule's **Deliverable** tab, preceded by sd_.

Add or remove a schedule task deliverable (coordinator)

As a schedule coordinator, you can add a deliverable to a schedule task, and optionally, add a deliverable instance (such as a drawing, part, or file) at the same time you create the deliverable container. Note that you can create the schedule task deliverable now and a schedule team member can add the schedule task deliverable instance later. You can also remove a deliverable from a schedule task.

When you create a schedule task deliverable with a deliverable instance, Teamcenter automatically adds the deliverable to the schedule.

Navigate to the schedule task

1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list of schedule tasks to find the desired task.

3. Click **Open** on the desired task.

4. Add a deliverable to a schedule task or remove a deliverable from a schedule task.

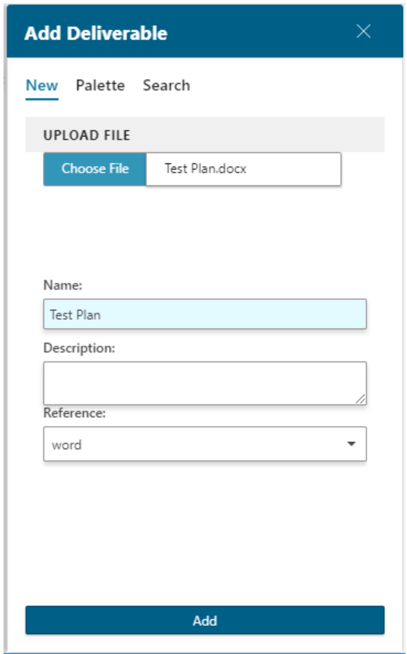
Add a deliverable to a schedule task

1. In the **DELIVERABLES** section, click **Add Deliverable** .

2. In the **Add Deliverable** panel, do one of the following.

To	Do
Search for an existing deliverable.	a. Click the **Search** tab. b. Enter the search criteria and click . c. Select a deliverable from the returned list.
Select a deliverable that was previously copied to the paste buffer using **Copy** .	a. Click the **Palette** tab. b. Select a deliverable from the **Clipboard** section.

To	Do
Select a favorite or recently viewed deliverable.	a. Click the **Palette** tab. b. Select a deliverable from the **Favorites** or **Recent** section. c. Enter the properties for the new deliverable. The properties vary depending on the type of deliverable being created.
Add a new deliverable without a deliverable instance.	a. Click the **New** tab. b. Do one of the following: • Select a recently used deliverable type from the **Recent** section. • Select a deliverable type from the **Other** section, or search for a deliverable type using the **Filter** box. c. Enter the properties for the new deliverable. The properties vary depending on the type of deliverable being created.
Add a new deliverable and assign the deliverable instance to the deliverable, for example, a PDF file or Word document.	a. Click the **New** tab. b. Click **Choose File** to find and associate a deliverable instance with the new deliverable you are creating. c. Enter the properties for the new deliverable. The properties vary depending on the type of deliverable being created.



3. Click **Add**.

Remove a deliverable from a schedule task

1. Select a deliverable from the list of deliverables.

2. From the primary toolbar, click **Edit** **Remove**.

Add or remove a schedule task deliverable instance (coordinator)

As a schedule coordinator, you may be required to add a deliverable instance to, or remove a deliverable instance from, an existing schedule task deliverable. Deliverable instances are the actual parts, drawings, or files that are associated with a schedule task deliverable. For example, you may be required to delete an outdated CAD drawing instance on a schedule task deliverable and add an updated drawing.

> Note:
>
> This procedure describes how to add or remove a deliverable instance, and not how to add the actual deliverable. The schedule coordinator can also add the deliverable instance when they create the deliverable.

> Note:
>
> You can only remove or add a deliverable instance on a deliverable that you created or that is assigned to you. For example, a team member cannot add a deliverable instance to a schedule

task that the member isn't assigned to. You can, however, use the **Replace File** command to replace an existing deliverable instance.

The window must be in **Table** view to complete this procedure.

Navigate to the schedule task

1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule task.

3. Select a schedule task from the list and click **Open**.

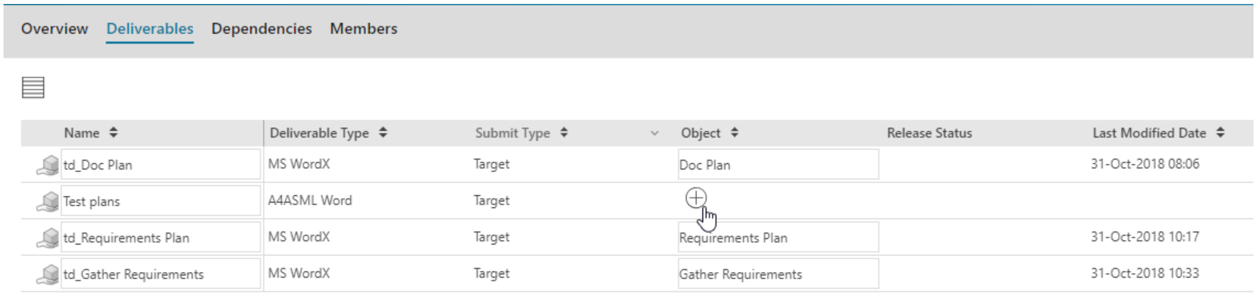
4. From the primary toolbar, click **Edit** > **Start Edit**.

5. In the **DELIVERABLES** section, click in the **Object** box on the desired deliverable row.

6. Add a deliverable instance to, or remove a deliverable instance from, a schedule task deliverable.

Add a schedule task deliverable instance

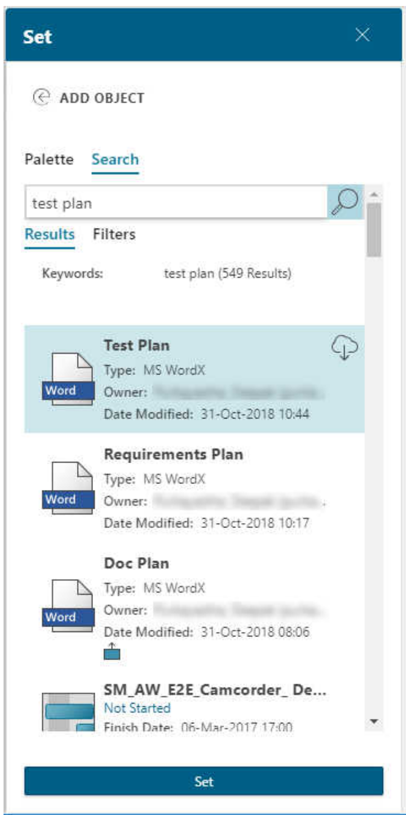
1. Click the add command that appears in the empty **Object** box.



2. In the **Set** panel, do one of the following.

To	Do
Search for an existing deliverable instance.	a. Click the **Search** tab. b. Enter the search criteria and click .

To	Do
	c. Select a deliverable instance from the list.
Select a deliverable instance that was previously copied to the paste buffer using **Copy**.	a. Click the **Palette** tab. b. Select a deliverable instance from the **Clipboard** section.
Select a favorite or recently viewed deliverable instance.	a. Click the **Palette** tab. b. Select a deliverable instance from the **Favorites** or **Recent** section.



3. Click **Set**.

4. From the primary toolbar, click **Edit** > **Save Edits**.

Remove a schedule task deliverable instance

1. Click the remove command that appears in the **Object** box.

2. From the primary toolbar, click **Edit** > **Save Edits**.

Add or remove a schedule task deliverable instance (team member)

As a schedule team member, you can add a schedule task deliverable instance, such as a file, part, or drawing, to a schedule task deliverable, which is the container for the instance. The deliverable instance is the actual work item that you are completing for an internal or external customer. For example, your schedule coordinator created a schedule deliverable without specifying an actual instance of the deliverable, assigned the schedule deliverable to a schedule task, and assigned the schedule task to you for completion. You must add the actual instance (work object) of that schedule task deliverable before you can complete your work.

You may need to remove a schedule task deliverable instance. For example, if you added the wrong instance to a schedule task deliverable. When you remove a deliverable instance you are not deleting it from Teamcenter, but you are deleting the link between the instance and the schedule task deliverable (container).

You can only remove a deliverable instance that you added, and you can only add a deliverable instance to a schedule task that has been assigned to you. Use the **Replace File** command to replace an existing deliverable instance. For example, if your schedule coordinator added an outdated instance file to the schedule task deliverable, you would need to use the **Replace File** command to update the deliverable instance to the most current file.

Navigate to the schedule Task

1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list of schedule tasks to find the desired task.

3. Click **Open** on the desired schedule task.

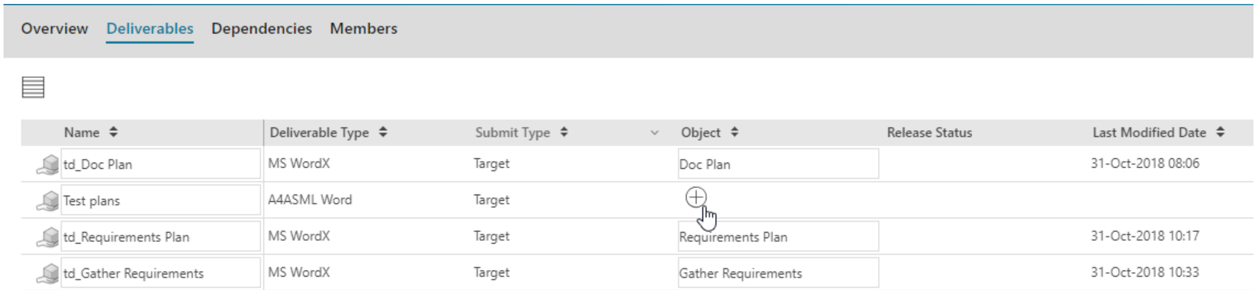
4. Add an instance to a schedule task deliverable or remove an instance from a schedule task deliverable.

Add a schedule task deliverable instance

1. From the **DELIVERABLES** section, select the deliverable.

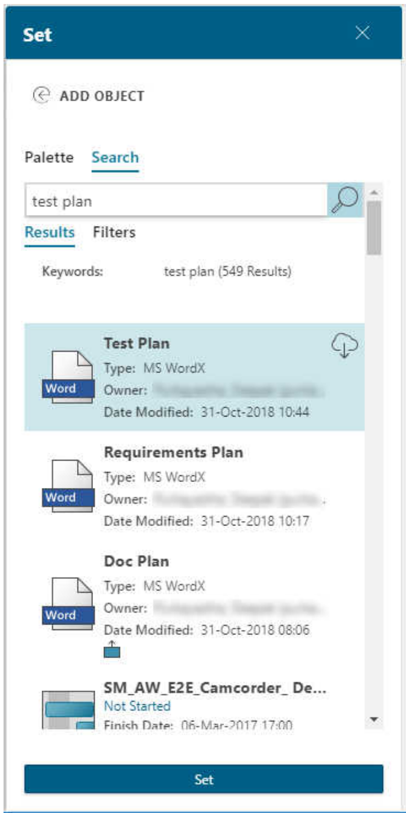
2. From the primary toolbar, click **Edit** **Start Edit**.

3. Click in the empty **Object** box and then click the **Add** command.



4. In the **Set** panel, do one of the following:

To	Do
Search for an existing deliverable instance.	a. Click the **Search** tab. b. Enter the search criteria and click . c. Select an deliverable instance from the returned list.
Select a deliverable instance that was previously copied to the paste buffer using **Copy** .	a. Click the **Palette** tab. b. Select a deliverable instance from the **Clipboard** section.
Select a favorite or recently viewed deliverable instance.	a. Click the **Palette** tab. b. Select a deliverable instance from the **Favorites** or **Recent** section.



5. Click **Set**.

6. From the primary toolbar, click **Edit** **Save Edits**.

Remove a schedule task deliverable instance

1. Select the deliverable from the list.

2. From the primary toolbar, click **Edit** **Start Edit**.

3. Click in the **Object** box and then click the **Remove** command .

4. From the primary toolbar, click **Edit** **Save Edits**.

Replace a schedule task deliverable instance

As a team member, you may be required to replace a deliverable instance on a schedule task deliverable that you did not create (therefore, you are not the owner). Deliverable instances are parts, drawings, or files that are associated with a schedule task deliverable. For example, you may be required to replace an outdated drawing with an updated drawing on a schedule task deliverable that the schedule coordinator created.

Note:

This procedure describes how to replace a deliverable instance, and not how to add the deliverable (container). The schedule coordinator often adds the deliverable instance when they create the deliverable.

1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list of schedule tasks to find the desired task.

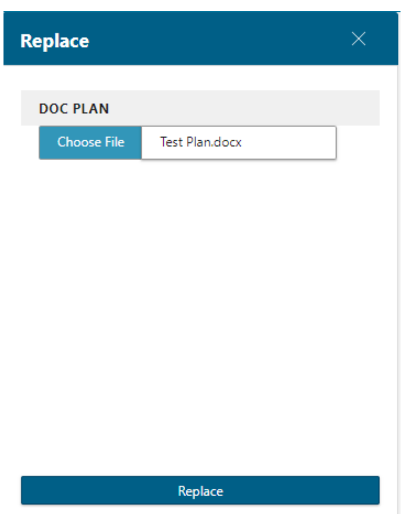
3. Select a schedule task from the list and click **Open**.

4. Click the **Deliverables** tab.

5. Select a schedule task deliverable from the list and click **Open**.

6. Click **Edit** > **Replace File**.

7. On the **Replace** panel, click **Choose File** to select the desired file and then click **Replace**.



Replace a schedule task deliverable revision

When a deliverable is added to a schedule task, the current revision of the deliverable is associated with the task. In some cases, this task deliverable may change or mature as the schedule is worked to completion.

If you need to update the deliverable for a task, you can choose to replace it with the latest working revision, or select a specific revision of the deliverable from a list of revisions. This allows you to keep your schedule task deliverables current as you continue the work on your schedules.

1. Search for the schedule that contains the task with the deliverable you want to update or click the **SCHEDULES** tile to view a list of your schedules.

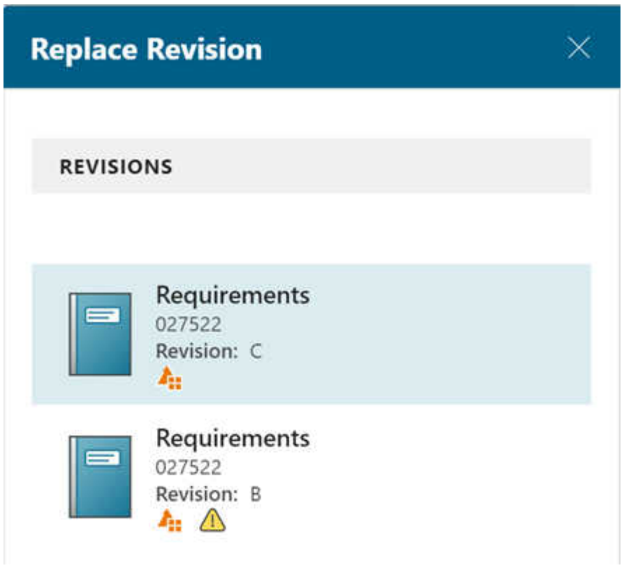
2. Click **Open** to view the schedule overview.

3. Click the **Tasks** tab and open the task with the deliverable you want to update.

4. In the **DELIVERABLES** section, select the deliverables that you want to update to the latest revision.

5. Click **Replace** and then do one of the following:

- Click **Replace Revision** to open the **Replace Revision** panel and view a list of all the revisions for the deliverable. You can select the desired revision from the list and then click **Replace** to update the deliverable to the newest revision.



> Note:
>
> If you select multiple deliverables, this option is grayed out. You can only select one deliverable if you want to choose a specific revision of the deliverable to replace.

- Click **Replace with Latest Revision** to update all selected deliverables to their latest revisions. Active Workspace prompts you to confirm the update of the selected deliverables. Click **Replace** to confirm the replacement and update your deliverables to the latest working revision.

Open and complete work on a schedule deliverable instance

As a schedule team member, to complete a schedule task deliverable you may need to open and update an associated deliverable instance, such as a CAD drawing, part, or Microsoft Word file.

1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule task.

3. Select a schedule task from the list and click **Open**.

4. Click the **Deliverables** tab.

5. While in **Table** view, click the link shown in the **Object** column.

6. If appropriate, click **Checkout** to check out the instance before making changes.

7. Select the deliverable and click **Open** to open the instance.

   You can select to open the instance in a new window or new tab.

8. Click **Edit** > **Checkout** to check out the instance before making changes.

9. Click **Open** > **Download**.

   The downloaded instance displays at the bottom of the screen. Click to open.

10. After you complete your work on this deliverable instance, save it to Teamcenter to capture your changes.

11. Click **Edit** > **Checkin** to check in the instance after making changes.

Edit schedule task deliverable instance properties

As a schedule coordinator or team member, you may need to update a schedule task deliverable instance's properties after the deliverable instance is added to the deliverable. You can update properties on a single deliverable instance, multiple deliverable instances, and on the **Information** panel.

Navigate to the schedule task deliverable instance

1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list of schedule tasks to find the desired task.

3. Select a schedule task from the list and click **Open**.

4. Click the **Deliverables** tab.

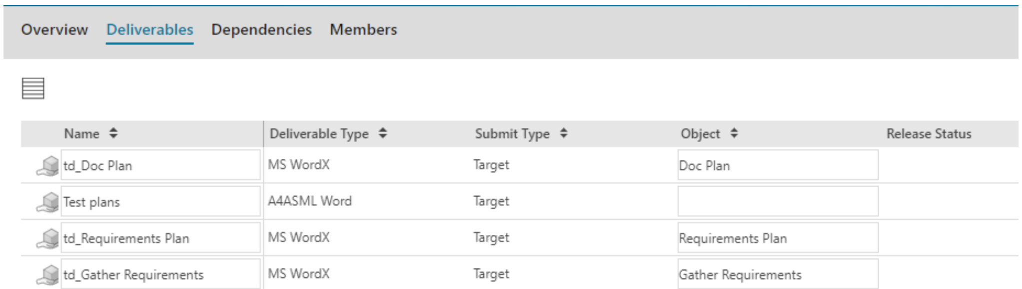
5. Update the properties on one or more deliverable instances or on the Information panel.

Edit properties on one or more deliverable instances

1. Select a deliverable instance from the list, or use multiselect mode to select multiple instances.

2. From the primary toolbar, click **Edit** **Start Edit**.

3. Edit the deliverable instances' properties in the table.

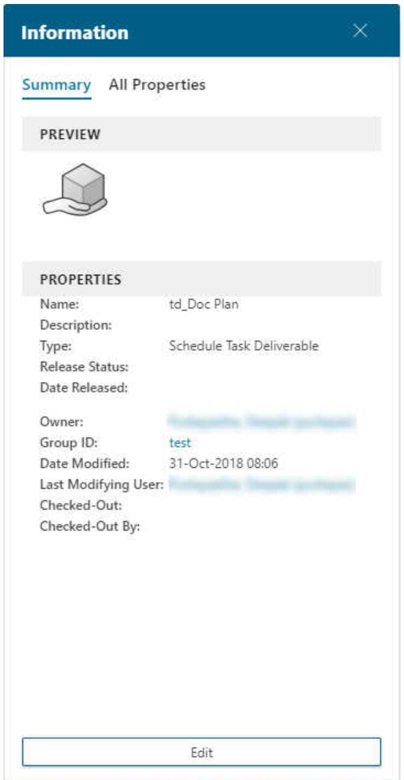


4. From the primary toolbar, click **Edit** **Save Edits**.

Edit deliverable instance properties on the Information panel

1. Select a deliverable instance from the list and click **Information**.

2. In the **Information** panel, click **Edit**.



3. Edit the deliverable instance's properties.

4. Click **Save**.

12. Managing your resources

Managing schedule members

View schedule members

Follow this procedure to view the members assigned to a schedule.

> Note:
>
> When the schedule coordinator creates the schedule, the schedule coordinator is added to the schedule membership. When the schedule coordinator assigns a resource name to a schedule task, that resource name is also added to the schedule membership.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Select a schedule from the list, or click **Open** .

   The **MEMBERS** section displays all the schedule members.

Add or remove a schedule member

Only schedule coordinators can maintain schedule membership by adding or removing members. The following apply to schedule membership:

- Adding members to a master schedule does not automatically add the members to subschedules.
- Adding members to a subschedule does not automatically add the members to the master schedule.
- When a schedule template is inserted into a master schedule template, the membership of the master schedule template is added to the subschedule template membership.
- All members of the master schedule template have access to the subschedule template.
- When you create a schedule you are automatically added to the schedule membership as the schedule coordinator.
- Assigning a resource name to a schedule task also adds the resource to the schedule membership as a participant (team member).
- The **Status** value reflects the user's status set by the Teamcenter system administrator.

The following member types apply:

Coordinator	A coordinator can read the full schedule information, write the scheduling information, and write the execution information. The scheduling information includes schedule dates, milestones, and resources. The execution information includes the task status percent complete, work complete, and task start and finish dates.
Participant	A participant can read the full schedule information and only write the execution information for tasks assigned to them, (for example, **Work Complete**). The participant role is referred to as a *team member*.
Observer	An observer can only read the full schedule information. The observer role is referred to as a *stakeholder*.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

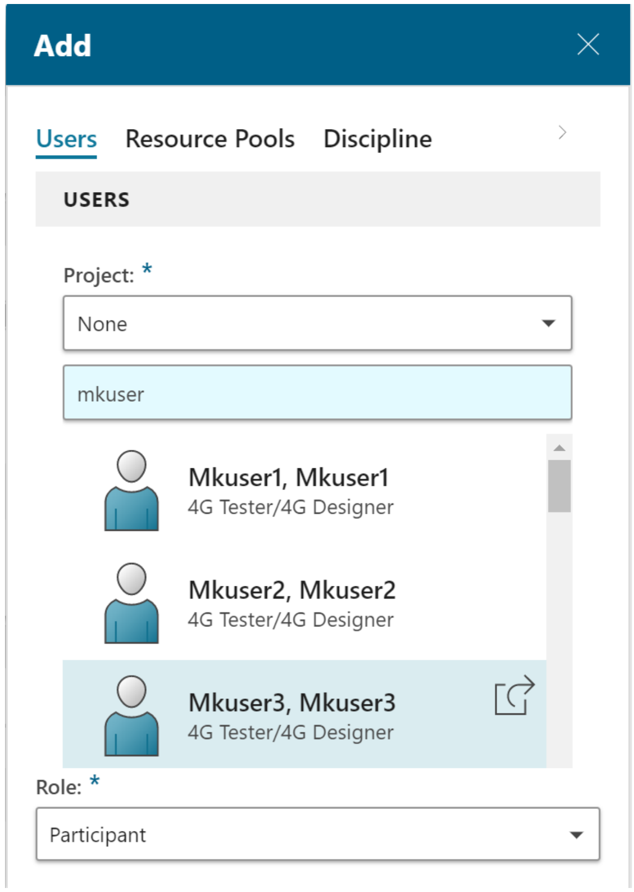
2. (Optional) Filter the returned list to quickly find the desired schedule.

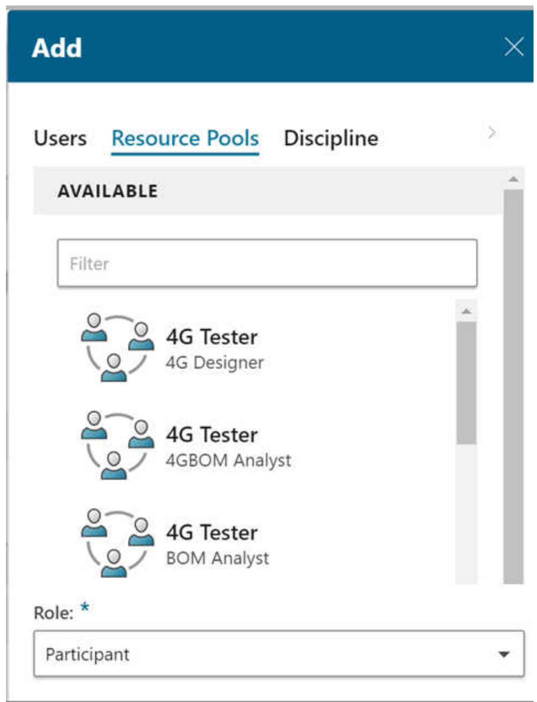
3. Select a schedule from the list and click **Open**.

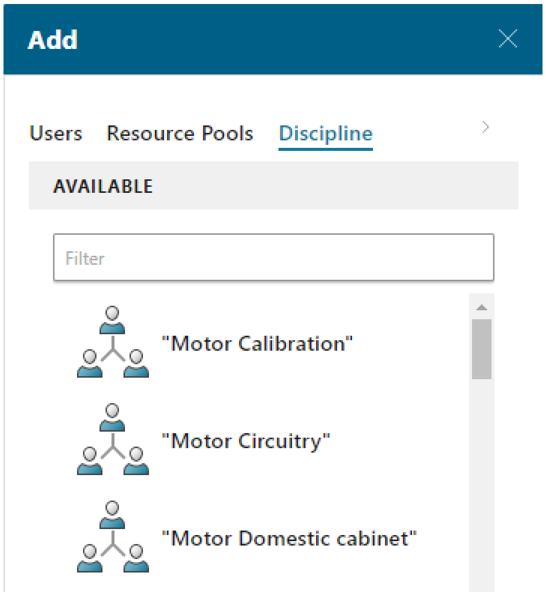
   The **MEMBERS** section displays all the schedule members.

4. Do one of the following.

To	Do
Add a member to this schedule.	a. Click **Add Member**. b. In the **Add** panel, select the user you want to add to the schedule. c. Select the new member's role, either **Participant**, **Observer** (stakeholder or team member), or **Coordinator** (schedule coordinator).

To	Do
	 Note: To add a resource as a participant, you can add the resource as an observer and then modify the resource's role. d. Click **Add**.
Remove a member from a schedule.	a. (Optional) View all schedule tasks associated with this member. b. (Optional) Unassign the member from any schedule tasks associated with this schedule. c. Select the user that you want to remove. d. From the primary toolbar, click **Edit** **Remove Member**. e. On the message that displays, click **Remove**.
Add a **resource pool**.	Resource pools are a collection of users that all have a similar role, such as schedule or workflow participants, change analysts, and engineers.

To	Do
	a. Click **Add Member** ⊕.
	b. In the **Add** panel, click the **Resource Pools** tab.
	
	c. Select the resource pool from the list of available pools.
	d. Select the role, either **Participant**, **Observer** (stakeholder or team member), or **Coordinator** (schedule coordinator).
	e. Click **Add**. The resource pool is added to the **MEMBERS** section of the schedule.
Add a **discipline**.	a. Click **Add Member** ⊕.
	b. In the **Add** panel, click the **Discipline** tab.

To	Do
	 c. Select the discipline from the list of available disciplines. d. Click **Add**. The discipline is added to the **MEMBERS** section of the schedule.

Change a schedule member's role

As a schedule coordinator, you can change a schedule member's assigned role for the selected schedule.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.
2. (Optional) Filter the returned list to quickly find the desired schedule.
3. Select a schedule from the list and click **Open**.

   The **MEMBERS** section displays all the schedule members.
4. Click **Edit** > **Start Edit**.
5. In the **Role In Schedule** box, click the dropdown arrow to select the desired schedule role for this member.
6. Click **Edit** > **Save Edits**.

Managing schedule task members

View users assigned to a schedule task

Follow this procedure to see which users are assigned to a schedule task. Only schedule coordinators can assign a resource to a schedule task.

1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule task.

3. Select a schedule task from the list and click **Open**.

   The **MEMBERS** section displays the users assigned to the schedule task.

View all schedule tasks assigned to schedule member

As a schedule coordinator, you can view all the schedule tasks assigned to a particular schedule member.

1. Search for the schedule using the search box, click **SCHEDULE** on your home page, or navigate to the schedule in your folder structure.

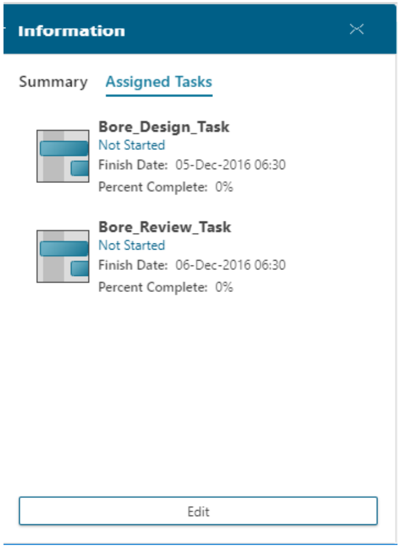
2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Select a schedule from the list and click **Open**.

   The **MEMBERS** section displays all the schedule members.

4. Select a member from the list and click **Information**.

5. In the **Information** panel, under **Assigned Tasks**, review the tasks assigned to this user.



Adjust resource percentage levels

As a schedule coordinator, adjust the **Resource Level** field in the schedule task's **RESOURCES** section to adjust your schedule based on effort-driven scheduling principles. Effort-driven scheduling automatically adjusts your schedule when you change a task's duration, the number of resources assigned to a task, or the amount of work a task requires.

1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule task.

3. Select a schedule task from the list and click **Open** .

   The **RESOURCES** section displays all schedule members assigned to the task.

4. On the primary toolbar, click **Edit** > **Start Edit**.

5. Modify the numerical value in the **Resource Level** box to indicate the percentage of time that this resource can devote to working on this schedule task.

6. On the primary toolbar, click **Edit** > **Save Edits**.

   View the effect that your changes had on the schedule from the schedule's **Gantt** tab.

Assign or unassign a schedule task resource

As the schedule coordinator, you can assign and maintain the resources responsible for working on each schedule task by assigning the task to a user, a resource pool, or a discipline. Use resource pools if you want to allow open-ended task assignments, which permit any user to accept responsibility for a task that is assigned to a group, role, or a role in a group. Use disciplines, such as change analyst or engineer, if you do not know the actual user that you want to assign to the task. Disciplines act as a placeholder for the task assignment until you know which specific user to assign to the task.

From the schedule's **Task** tab you can add a single user, resource pool, or discipline to one or more schedule tasks. From the schedule task's **RESOURCES** section, you can add a single user to a single schedule task.

You can unassign a user, resource pool, or discipline from a schedule task from either the schedule's **Task** tab or from the schedule task's **RESOURCES** section.

> Note:
>
> Assigning a user to a schedule task also adds the user to the schedule membership as a participant (team member).

Navigate to the schedule task within the schedule

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Select a schedule from the list and click **Open**.

4. Click the **Tasks** tab.

5. Assign a user, resource pool, or discipline, or unassign a user, resource pool, or discipline from the schedule task.

Assign a user, resource pool, discipline, or schedule member to one or more schedule tasks

1. Do one of the following.

To	Do
Assign a user, resource pool, discipline, or schedule member to one or more schedule tasks using the	a. Select a task, or enter multiselect mode to select multiple tasks from the list, and click **Manage** **Assign/Unassign Resources**. b. Select the appropriate tab in the **Assign/Unassign Resources** panel (**Users**, **Resource Pool**, **Discipline**, or **Schedule Members**).

To	Do
schedule's **Task** tab.	
Assign a user to a schedule task using the task's **RESOURCES** section.	a. Select a schedule task from the list and click **Open**. b. In the **RESOURCES** section, click **Assign/Unassign Resources**.

2. (Optional) If the schedule task has been assigned to a Teamcenter project, you can narrow the resource list to a specific project by selecting a project from the **Project** box. If no value is selected, the organization user list appears.

3. Select the desired resource by doing the following.

   a. Select a user, resource pool, discipline, or schedule member from the list or search for a user, resource pool, discipline, or schedule member by entering a value in the **Filter** box.

   b. (Optional) Click **Resource Load** on the resource's tile to view the resource's work load before committing to the assignment.

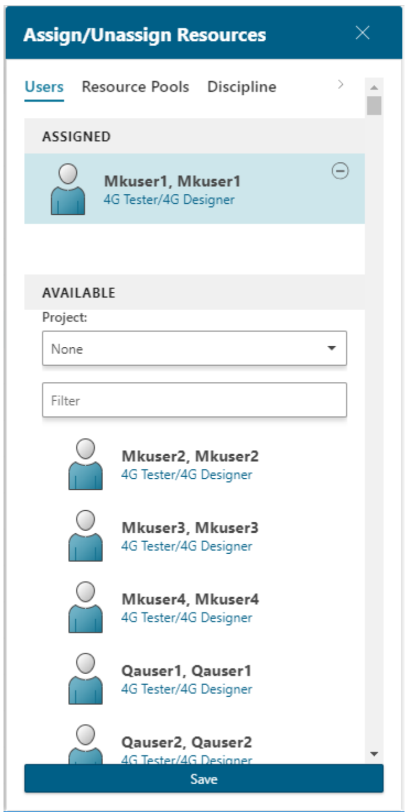
   You must be assigned to the Resource Graph Viewers role to view the resource's work load.

   c. Select a user.

4. Click **Assign**.

Unassign a user, resource pool, or discipline from one or more schedule tasks

To	Do
Remove a user, resource pool, discipline, or schedule member from one or more schedule tasks using the	1. Select one or more tasks from the list and click **Manage** > **Assign/ Unassign Resources**. Tip: To select more than one task, enter multiselect mode.

To	Do
schedule's **Task** tab.	2. Select the appropriate tab in the **Assign/Unassign Resources** panel (**Users**, **Resource Pool**, **Discipline**, or **Schedule Member**). 3. Under the **Assigned** section, click **Unassign** ⊖ next to the resource you want to remove from the task. 4. Click **Save**. 
Remove a user, resource pool, discipline, or schedule member from one schedule task using the task's **RESOURCES** section.	1. Select a schedule task from the list and click **Open**. 2. In the **RESOURCES** section, select the user, resource pool, or discipline that you want to remove. 3. From the primary toolbar, click **Manage** > **Unassign Resource**.

Designate a discipline user to a discipline

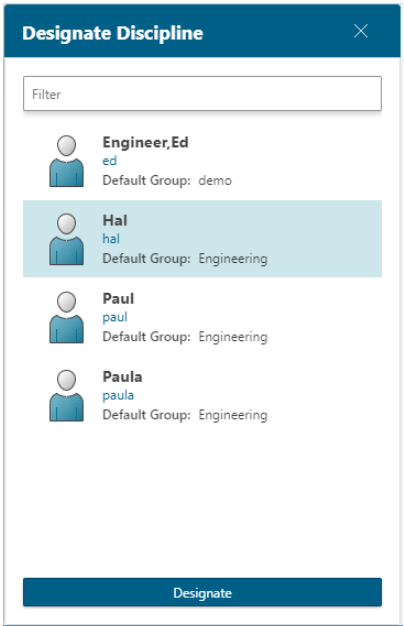
As a schedule coordinator, you can designate a specific discipline member as responsible for *all the tasks* within this schedule that are assigned to that discipline. If you want to designate different users within the discipline to certain schedule tasks, use the **Designate Discipline** feature on the schedule's **Tasks** tab.

The following apply:

- All the tasks within this schedule that are assigned to the discipline will now be owned by the selected discipline member.
- The discipline as a user is not removed from the schedule membership but the selected discipline member is added to the member list if they are not already a member.
- You cannot designate a discipline member if the selected discipline does not have an assigned task.
- The discipline member designation applies only to this schedule.
- You cannot designate a discipline member if the task has been sent to workflow.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.
2. (Optional) Filter the returned list to quickly find the desired schedule.
3. Select a schedule from the list and click **Open**.

   The **MEMBERS** section displays all the schedule members.
4. Select a discipline member from the list.
5. Click **Manage** > **Designate Discipline**.
6. On the **Designate Discipline** panel, select a disciple member from the list or use the **Filter** box to filter the list for the desired member name.
7. Click **Designate**.



View a resource's work load

As a schedule coordinator, you can view a user's current workload prior to assigning the user to a schedule task. This allows you to level a schedule's workload by not over-assigning or under-assigning your resources.

The following visual indicators are used:

- Green Availability Flag—When the user's availability > or = current task's duration.
- Red Availability Flag—When the user's availability < the current task's duration.

To view a resource's workload, the schedule coordinator must be assigned to the Resource Graph Viewers role and the schedule coordinator must be logged in to Active Workspace under that role.

A resource's load and availability are calculated as follows.

Capacity	A user's total available calendar time during the selected task's timeframe.
Load	[(Capacity-Availability)/Capacity] displayed as a percentage.
Availability	Capacity-duration of user's total assigned tasks during the selected task's duration.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

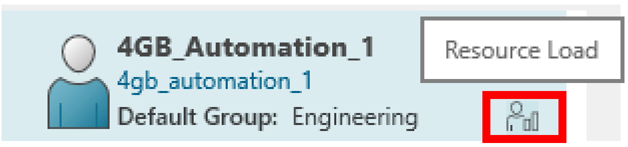
2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Select a schedule from the list and click **Open** .

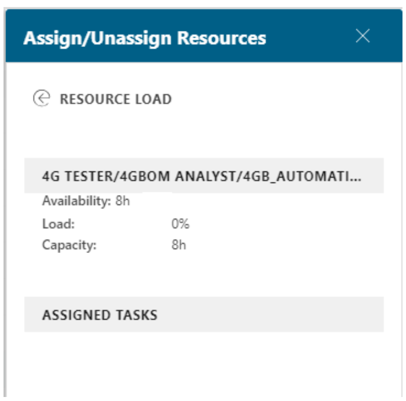
4. Click the **Tasks** tab.

5. Select a task from the list and click **Manage** **Assign/Unassign Resources**.

6. On the **Assign/Unassign Resources** panel, hover over a user and click **Resource Load** .



7. In the **Resource Load** section, verify the selected resource's workload availability before assigning the resource to a task.



You must be assigned to the Resource Graph Viewers role to view the resource's work load.

Designate a schedule task user from a discipline placeholder or revert a user back to a discipline placeholder

As a schedule coordinator, you can assign a discipline to a schedule task as a placeholder for the user responsible for completing the task. For example, if you know that a schedule task is going to be assigned to someone in Engineering, but you don't yet know who within Engineering is going to be available to complete this task, you can assign the task to the Engineering discipline as a placeholder. Once you know which user within the discipline is going to work on the schedule task you can designate one or more users from the discipline to the task.

Likewise, you may need to revert a designated schedule task user back to a discipline placeholder. For example, if the user you assigned from the Engineering discipline is over-scheduled you can revert that user back to the Engineering discipline placeholder until you secure an available user resource.

Note:

If you want to designate that a specific discipline member is responsible for *all the tasks* within this schedule that are assigned to that discipline, use the **Designate Discipline** feature in the schedule's **MEMBERS** section.

Navigate to the schedule task within the schedule

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Select a schedule from the list and click **Open** .

4. Click the **Tasks** tab.

5. Designate a schedule task user from a discipline placeholder or revert a user back to a discipline placeholder.

Designate a schedule task user to a discipline placeholder

This task assumes that you have already assigned a discipline placeholder to the task.

You can designate one or more users to multiple schedule tasks at one time, as long as all the tasks share a common discipline placeholder.

1. Select one or more tasks from the list and click **Manage** **Designate Discipline**.

   Tip:

   To select more than one task, enter multiselect mode.

2. On the **Designate Discipline** panel, select **Common** to show only disciplines common to all selected schedule tasks, or **All** to see all disciplines for the selected tasks.

3. Select a discipline and then select the desired user from within that discipline.

4. Click **Designate**.

   The **Resource Assignment** column on the **Tasks** tab reflects the designated user's name instead of the discipline placeholder.

Revert a user back to a discipline placeholder

1. Select one or more tasks from the list and click **Manage** **Revert to Discipline**.

   Tip:

   To select more than one task, enter multiselect mode.

2. On the **Revert to Discipline** panel, select the user and then click **Revert**.

   The **Resource Assignment** column on the **Tasks** tab reflects the discipline placeholder of the designated user.

Remove all tasks assigned to a schedule member

As a schedule coordinator, you may want to unassign a member from all tasks to which that member is assigned within a particular schedule. For example, you must unassign a member from all schedule tasks before removing the member from the schedule.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Click **Open** .

   The **MEMBERS** section displays all the schedule members.

4. Select the member from the list.

5. From the primary toolbar, click **Edit** > **Remove Assignments**.

Reassign all schedule tasks from one schedule member to another user

As a schedule coordinator, you may want to complete a bulk reassignment of schedule tasks from one member to another. For example, if a schedule member leaves the company, prior to removing that member from the schedule, you must either remove all tasks assigned to that member or reassign them to another schedule member.

The following apply:

- Tasks that are in a workflow process or a locked state cannot be reassigned.

- If any of the tasks belonging to the original team member have been started, Teamcenter cannot complete the reassignment operation.

- Task reassignment does not remove the member from the schedule.
- This is an asynchronous process which requires dispatcher services to be running in the background. Your system administrator can find information about configuring asynchronous service in *Installing and Configuring Dispatcher* in the Teamcenter help collection.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

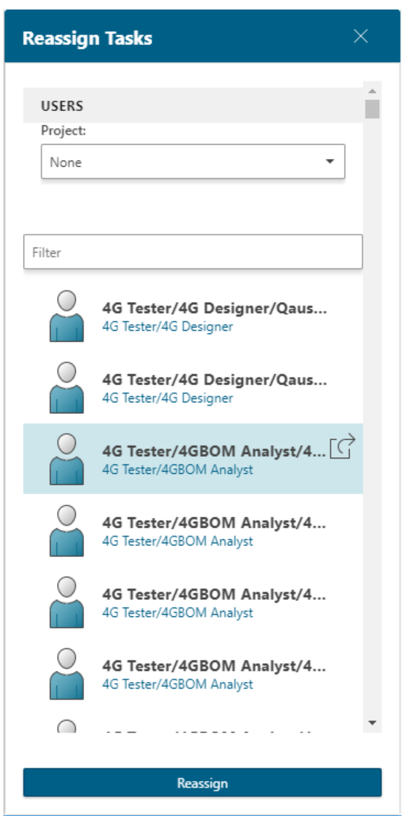
3. Click **Open**.

   The **MEMBERS** section displays all the schedule members.

4. Select the member whose tasks you want to reassign.

5. From the primary toolbar, click **Manage** > **Reassign Tasks**.

6. In the **Reassign Tasks** panel, select a member from the list. This is the member to whom you are reassigning the tasks.



7. Click **Reassign** on the confirmation message.

Note:

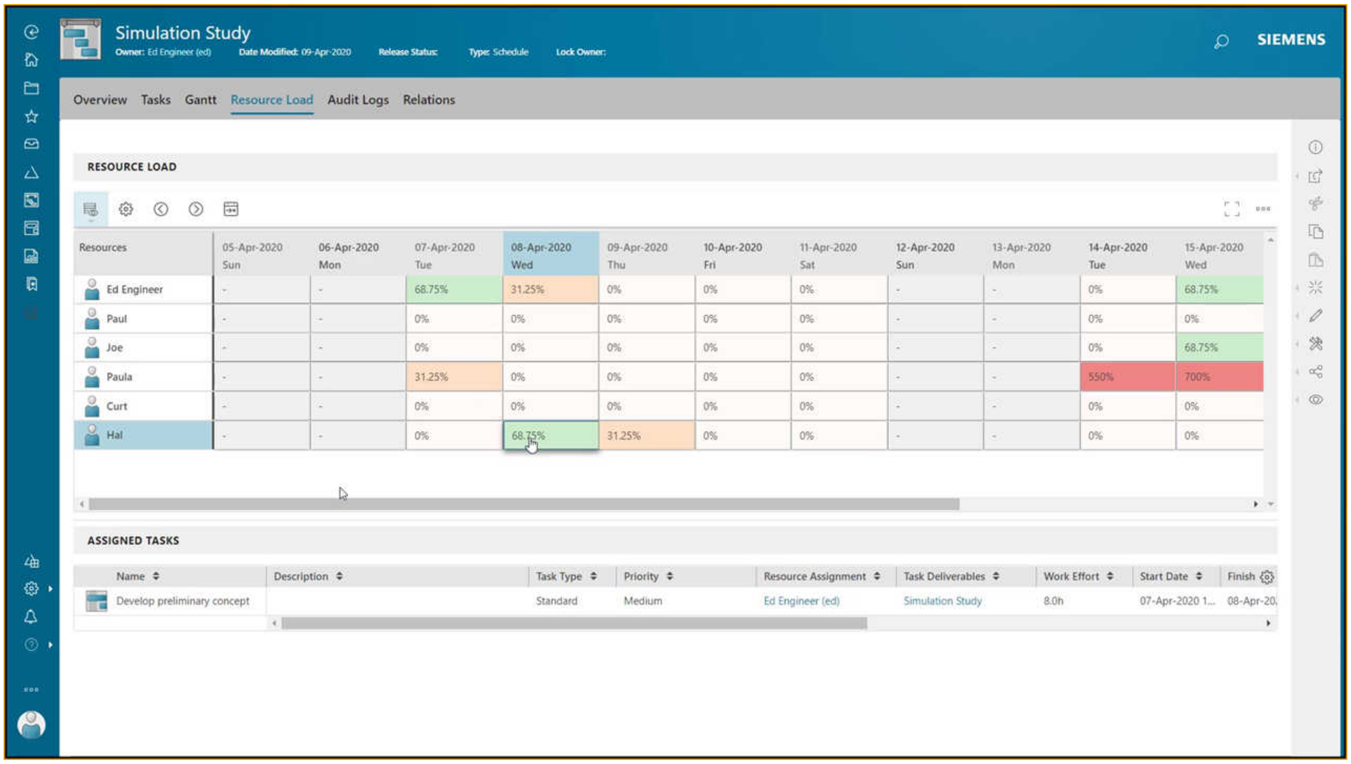
If the selected member is not currently a schedule member, the member's name is added as a schedule member as well as assigned to the task.

Viewing resource load for schedules

About the resource load view

You can view the resource load for schedule members to get a high-level overview of the work load for the schedule resources. This allows you to more easily manage your users across teams and schedules.

The **Resource Load** view displays the resource load in two week increments. You can navigate to the previous or next two weeks, go to a specific date, and quickly return to the view that shows the current date. You can also customize the view to show only the current schedule or all schedules, and specify an exact date to view.



View resource load for schedule members

You can view the resource load for schedule members and see which tasks the members are assigned to work.

1. Open the schedule that contains the schedule members whose resource load you want to view.

2. Click the **Resource Load** tab.

   A chart opens that displays the schedule resources, a range of dates, and the percentage of resource load for the schedule members.

   > Note:
   >
   > You must be assigned to the **Resource Graph Viewers** role to view resources' work load.

3. Do any of the following:

- Select a resource to view their assigned tasks.
- Click **Next Two Weeks** or **Previous Two Weeks** to view different date ranges.
- Click **Today** to return to the current date.
- Click **Interface Details** to choose where to display the assigned tasks list. You can display it below, to the right, or turn it off entirely.
- Click **Settings** to customize the displayed workload or navigate directly to a specified date.

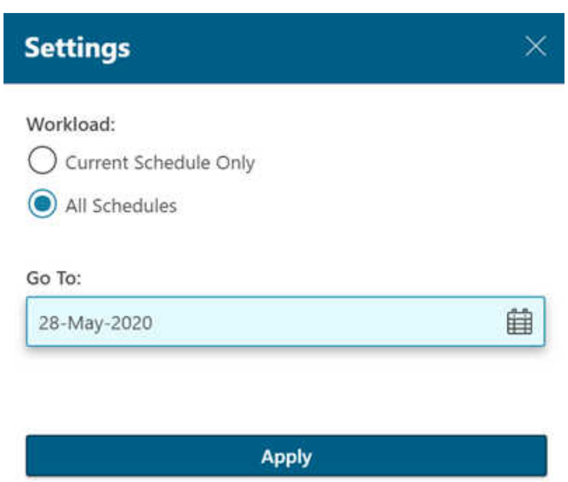
Customize the resource load view

You can customize the resource load view to show only the current schedule or all schedules, or to specify a specific date to view.

1. View the resource load for a schedule.

2. Click **Settings**.

   The **Settings** panel opens.



3. In the **Workload** section, choose to display resources and their load based on the **Current Schedule Only** or on **All Schedules**.

4. In the **Go To** section, select a specif date from the calendar that you want to view.

5. Click **Apply** to update the view with the new settings.

> Note:
>
> When you specify a specific date to view, the entire two weeks (including your specified date) are shown. You can quickly return to the current date by clicking **Today** .

13. Updating your schedule tasks

Update the status of a schedule task

As a team member, as you complete work on a schedule task, you can manually update the **Execution Properties** values to show the schedule task's current status. If you are updating a schedule task that is associated with a workflow, these status values may be automatically updated as the workflow progresses, but you can still manually modify the values, if appropriate.

You can update properties on a single schedule task, multiple schedule tasks, or on the schedule task's Information panel.

The selected display method (**Table**, **Table with summary**, **List with summary**) affects where you make the updates and how many schedule tasks you can update. To update a schedule task while in the **List** display method, use the **Information** panel, or open the schedule task and update the properties on the **Overview** tab.

Update properties on a single schedule task

You can also use the **Edit** **Start Edit** on the primary toolbar to update a schedule task's properties from the **Overview** tab within the open task.

1. Click **SCHEDULE TASKS** on your home page.

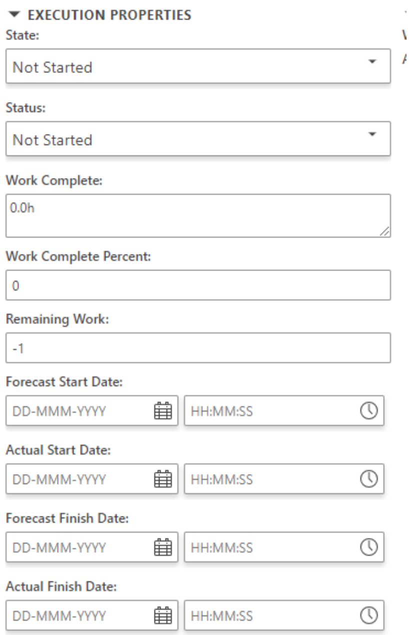
2. Select either the **List with summary** or **Table with summary** display method.

3. Select the desired schedule task from the list.

4. From the primary toolbar, click **Edit** **Summary**.

   If you are using the **Table with summary** view, you can click **Edit** in the upper right corner of the table to edit the properties displayed in the table view.

5. Edit the schedule task's properties.



6. From the primary toolbar, click **Edit** **Save Edits**.

Update properties on multiple schedule tasks

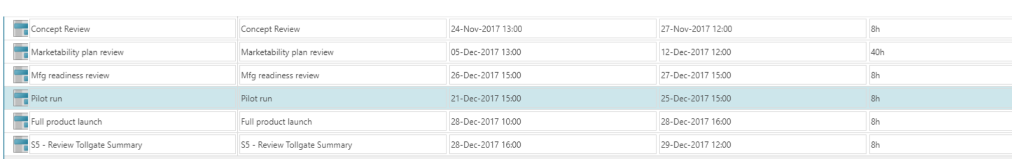
This display method enables you to update properties directly within the table. It's a convenient method to use to update properties on more than one schedule task.

1. Click **SCHEDULE TASKS** on your home page.

2. Select either the **Table** or the **Table with summary** display method.

3. Click **Edit** in the upper right corner of the view.

4. Edit the schedules tasks' properties in the table.



Concept Review	Concept Review	24-Nov-2017 13:00	27-Nov-2017 12:00	8h
Marketability plan review	Marketability plan review	05-Dec-2017 13:00	12-Dec-2017 12:00	40h
Mfg readiness review	Mfg readiness review	26-Dec-2017 15:00	27-Dec-2017 15:00	8h
Pilot run	Pilot run	21-Dec-2017 15:00	25-Dec-2017 15:00	8h
Full product launch	Full product launch	28-Dec-2017 10:00	28-Dec-2017 16:00	8h
S5 - Review Tollgate Summary	S5 - Review Tollgate Summary	28-Dec-2017 16:00	29-Dec-2017 12:00	8h

5. Click **Save** to save or cancel your edits.

Update schedule task properties in the Information panel

You can access the **Information** panel from within any display method.

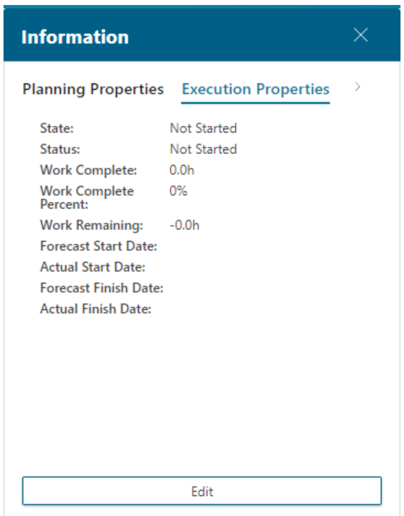
1. Search for the schedule task using the search box, click **SCHEDULE TASKS** on your home page, or navigate to the schedule task in your folder structure.

2. Select the desired schedule task.

3. Click **Information** .

4. Click to scroll to **Execution Properties**.

5. Click **Edit**.



6. Edit the schedule task's properties.

7. Click **Save**.

Field definitions for schedule task execution properties

As a team member, you can manually update the following execution properties fields as you complete your assigned tasks. Some of these properties may also be updated automatically if this task was assigned to a workflow.

Field name	Definition	Valid values
State	Identifies the current state of this schedule task. A schedule task progresses through a series of predefined states as the work is completed. The **State** value affects the available values within the **Status** box, and the two values work together to provide a complete picture of the schedule task's	**Not Started** **In Progress** **Complete** **Closed** **Aborted**

Field name	Definition	Valid values
	progress. For example, the schedule task's state is **In Progress** but its status is **Needs Attention**. Teamcenter automatically sets this field to **Closed** when a schedule task timesheet entry is approved. Select a value from the list of values.	
Status	Identifies the current status of this schedule task *within the selected state*. Note that the list of values for this field changes based on what is selected in the **State** box. The two values work together to provide a complete picture of the schedule task's progress. For example, the schedule task's state is **In Progress** but its status is **Needs Attention**. Teamcenter automatically sets this field to **Closed** when a schedule task timesheet entry is approved. Select a value from the list of values. Caution: Once a schedule task has been set to **Aborted**, the status cannot be changed or reversed.	**Not Started** **In Progress** **Late** **Needs Attention** **Complete** **Abandoned** **Aborted**
Work Complete	Identifies the number of hours completed on this task. Teamcenter automatically updates this field when a schedule task timesheet entry is approved. If the **Is Percent Linked** field on the schedule is set to **True**, this field value updates the **Percent Complete** field on the schedule.	Enter a numerical value.
Work Complete Percent	Identifies the total percentage of work that has been completed on this task.	Enter a numerical value.

Field name	Definition	Valid values
	Teamcenter automatically updates this field when a schedule task timesheet entry is approved. If the **Is Percent Linked** field on the schedule is set to **True**, this field value updates the **Work Complete** field on the schedule.	
Remaining work	Identifies the amount of work remaining on this task.	Enter a numerical value.
Forecast Start Date	Specifies the date and time that work on this task was forecasted to begin.	Click the date box to select a date from the calendar. Click the time box to select a time.
Actual Start Date	Specifies the actual date and time that work on this task began.	Click the date box to select a date from the calendar. Click the time box to select a time.
Forecast Finish Date	Specifies the date and time that work on this task was forecasted to end.	Click the date box to select a date from the calendar. Click the time box to select a time.
Actual Finish Date	Specifies the actual date and time that work on this task ended. Teamcenter automatically updates this field when a schedule task timesheet entry is approved.	Click the date box to select a date from the calendar. Click the time box to select a time.

14. Completing timesheets

Managing timesheets

The following statements are true for timesheets:

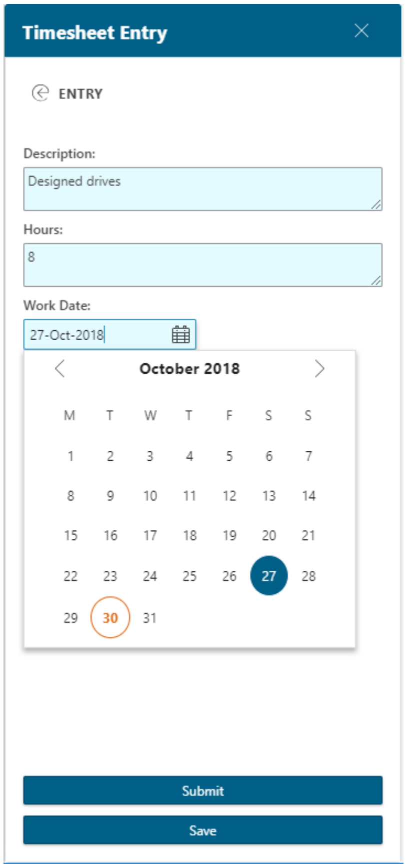
- You must have tasks assigned to you in order to access timesheets.
- The timesheet entry is related to the task that the work is performed against and the user who performs the work.
- Timesheet entries can have the following **Status** values: **Entry, Submitted, Approved,** or **Rejected**.
- Each timesheet entry is associated to a specific task.
- Each task can contain multiple timesheet entries.
- When the timesheet entry is approved, Teamcenter automatically:
  - Applies time entered to the associated task's **Work Complete** and **Work Complete Percent** fields.
  - Updates the value in the **Actual Finish Date** field to the date entered on the entry.

Create a timesheet entry

As a schedule member assigned to a schedule task, record the work you have completed against the task by creating a timesheet entry. You can create and save multiple entries against a task before you submit the entries for approval, or you can submit the entries for approval as they are created.

1. On the home page, click **SCHEDULE TASKS**.
2. Select the task from the list and click **New** > **Timesheet Entry**.
3. On the **Timesheet Entry** panel, do the following.
   a. Click **Add Entry**.
   b. Enter the description, hours, and date for this entry.
   c. Do one of the following:
      - Click **Save** to save this entry but not submit it for approval. Saved entries can be edited, if necessary, and submitted for approval later.

- Click **Submit** to submit this entry for approval. Submitted entries cannot be edited.



Edit a timesheet entry

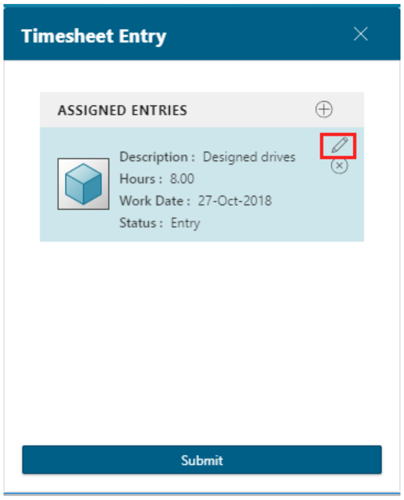
As a schedule member, you may need to edit a saved or rejected timesheet entry. You cannot edit an entry that has been submitted for approval or an entry that has been approved.

1. On the home page, click **SCHEDULE TASKS**.

2. Select the task from the list and click **New** > **Timesheet Entry**.

3. On the **Timesheet Entry** panel, do the following.

   a. Hover over the entry that you want to modify and click **Edit**.



b. Modify the entry description, hours, and date.

c. Do one of the following:

- Click **Save** to save this entry but not submit it for approval. Saved entries can be edited, if necessary, and submitted for approval later.

- Click **Submit** to submit this entry for approval. Submitted entries cannot be edited.

Delete a timesheet entry

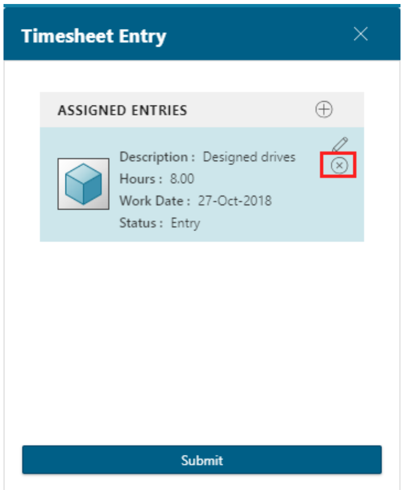
As a schedule member, you can delete any timesheet entry that has not been submitted for approval.

1. On the home page, click **SCHEDULE TASKS**.

2. Select the task from the list and click **New** > **Timesheet Entry**.

3. On the **Timesheet Entry** panel, do the following.

   a. Hover over an entry and click **Delete**.



b. Click **Delete** on the message that displays

Submit a saved timesheet entry

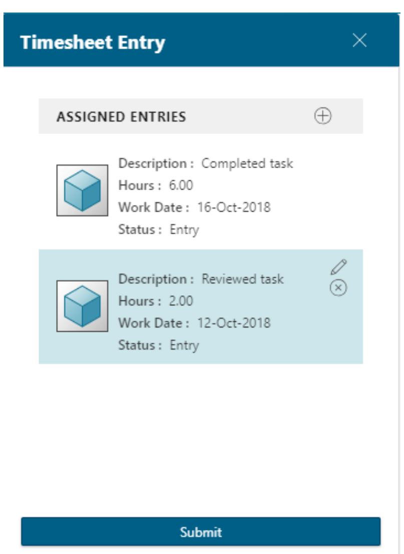
As a schedule member, you can submit a saved timesheet entry for approval once you are satisfied with the entry's attributes. You can also create and directly submit entries for approval as the entries are created. Submitted entries cannot be edited.

1. On the home page, click **SCHEDULE TASKS**.

2. Select the task from the list and click **New** > **Timesheet Entry**.

3. On the **Timesheet Entry** panel, do the following.

    a. Select the entry from the **Assigned Entries** list.



b. Click **Submit**.

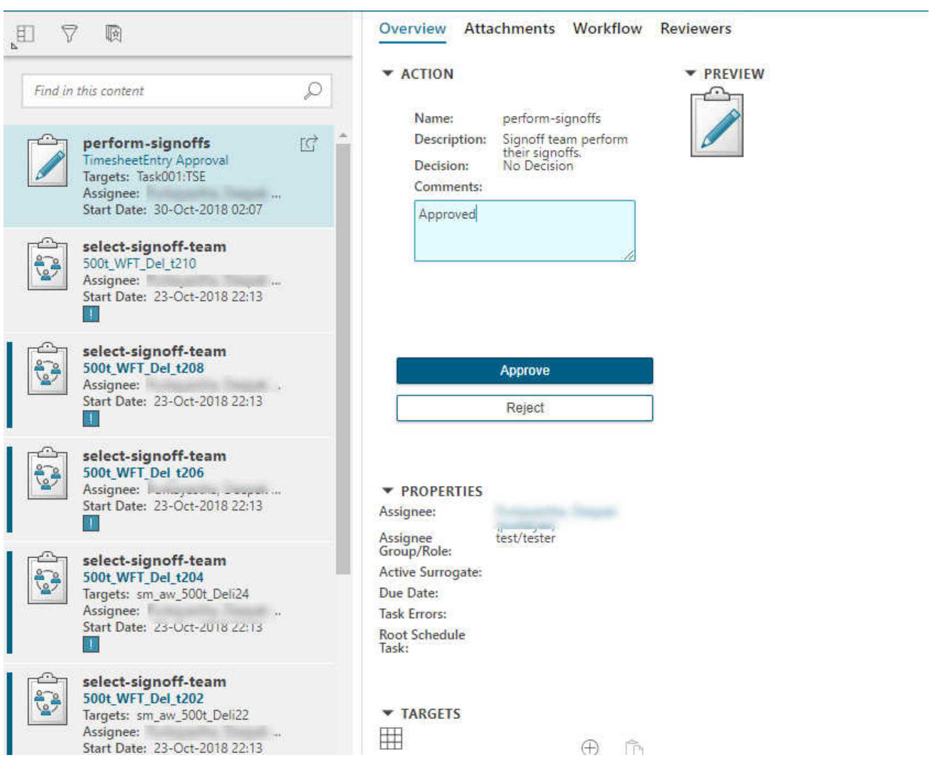
Approve or reject a timesheet entry

As a schedule coordinator, you can approve or reject timesheet entries submitted against schedule tasks. When you approve an entry the **Work Complete**, **Work Complete Percent**, **State**, **Status**, and **Actual Finish Date** fields on the task are automatically updated. When you reject an entry the owner receives an email stating that the entry was rejected, along with any comments you entered in the **Comments** box. When you reject a timesheet entry, the status changes to **Entry** and the timesheet entry is available for editing.

1. On the home page, click the **Inbox** tile.

2. From the inbox, select an approval task and do the following.

To	Do
View the task timesheet entry details.	• Click the **Attachments** tab.
Approve or reject the timesheet entry.	a. Optional, enter your comments in the **Comments** box. b. Click **Approve** or **Reject**.



15. Exchanging data between Microsoft Project and Schedule Manager

Import a schedule into Microsoft Project and update the schedule task planning properties

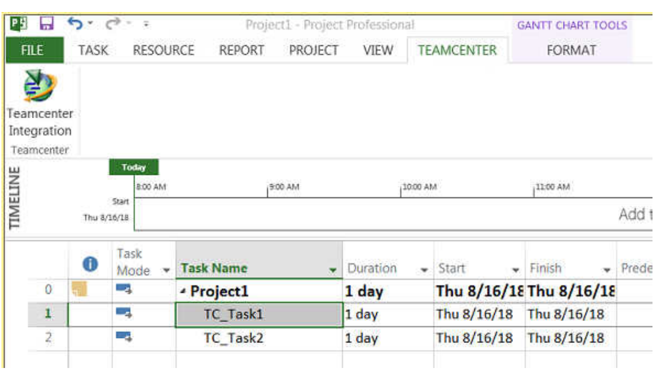
As a schedule coordinator, you can import a Schedule Manager schedule into Microsoft Project and update the schedule tasks' planning and execution properties from within Microsoft Project. This functionality is useful when there are employees in your organization who are responsible for updating schedules but don't use Active Workspace or Schedule Manager.

> Note:
>
> Your system administrator must first configure Microsoft Project integration.

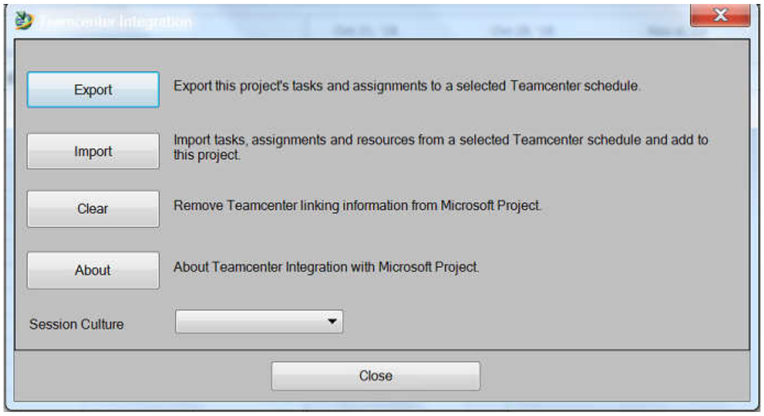
> Note:
>
> If there is any existing data in the Microsoft Project file when you import the Schedule Manager data, a message displays informing you all existing data in the Project file will be deleted. The existing data is deleted because it is overwritten with the new data.

1. Log on to Microsoft Project.

2. Click Teamcenter **Integration**.



3. On the Teamcenter Integration screen, click **Import**.



4. Log on to the Teamcenter server by entering your **User ID** and **Password**, and then clicking **Login**.

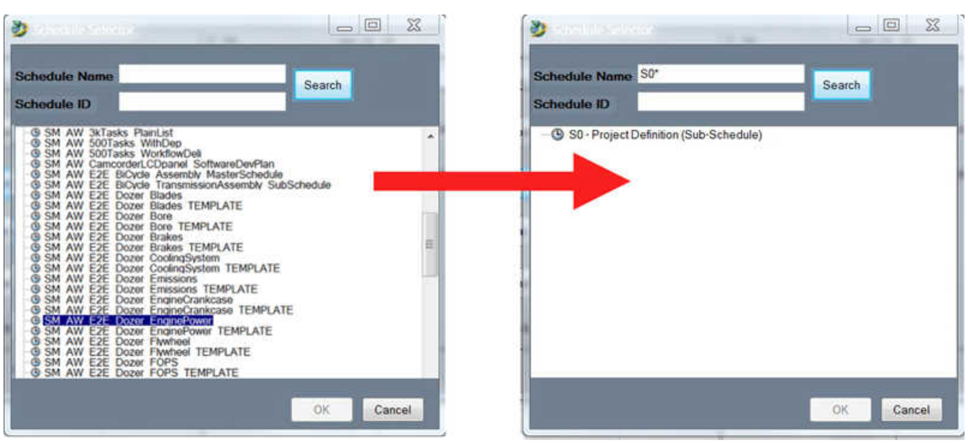
   If you are set up to use single sign-on (SSO), you may not be prompted to log into the Teamcenter server.

5. Do one of the following:

   - Select a schedule from the Schedule Selector and then click **OK**.
   - Use the **Schedule Name** and **Schedule ID** boxes to filter the list when a large number of schedules are displayed. Once you have narrowed the results, select your desired schedule and then click **OK**.

     Note:

     If more than 500 results are still displayed after you filter the results, Active Workspace prompts you to further refine your filters. This helps optimize performance of the Teamcenter Integration plugin.



6. Use Microsoft Project to update the following schedule task planning and execution properties: Start Date, Finish Date, Duration, Work Estimate, Priority, Fixed Type, Constraint, Actual Start Date, Actual Finish Date, Percent Complete, Task State, Task Status.

7. **(Optional) Export the schedule to Active Workspace.**

Export a schedule from Microsoft Project

As a schedule coordinator, you can export a schedule from Microsoft Project into Active Workspace Schedule Manager. This updates the schedule's associated In Progress schedule tasks with the values that were updated during the import process, adds any newly created tasks, or removes any deleted tasks.

The following execution planning properties are updated:

- **Work % Complete**
- **Task State**
- **Actual Start Date**
- **Actual Finish Date**

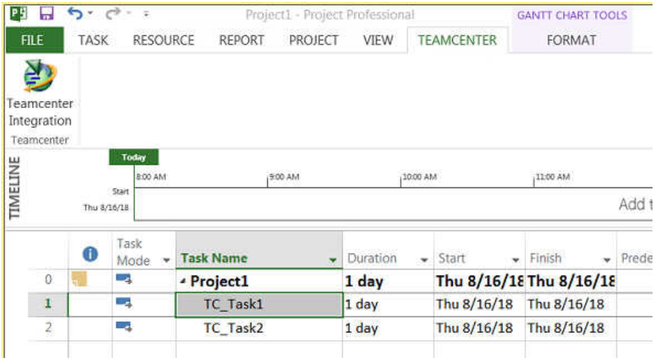
The following task planning properties are updated:

- **Work Effort**
- **Start Date**
- **Finish Date**
- **Duration**
- **Priority**
- **Fixed Type**
- **Constraint**

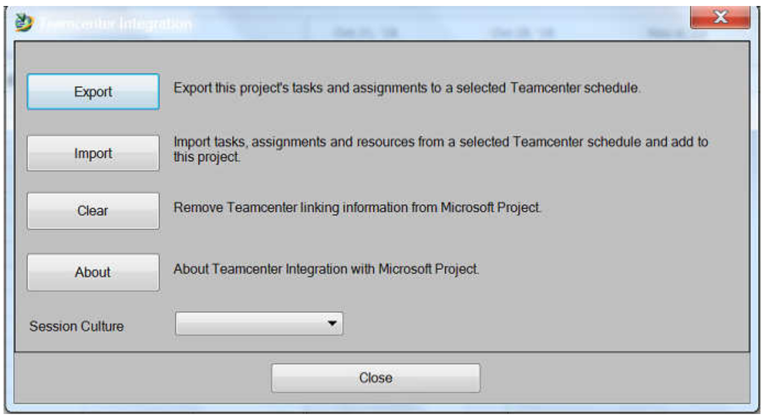
> Note:
>
> Your system administrator must first configure Microsoft Project integration.

1. Log in to Microsoft Project.

2. Click Teamcenter **Integration**.



3. On the Teamcenter Integration screen, click **Export**.



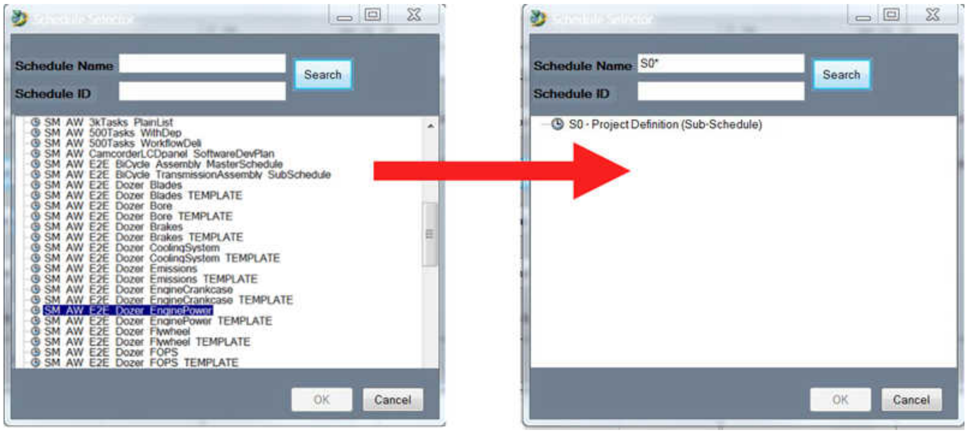
4. Log on to the Teamcenter server by entering your **User ID** and **Password**, and then clicking **Login**.

   If you are set up to use single sign-on (SSO), you may not be prompted to log into the Teamcenter server.

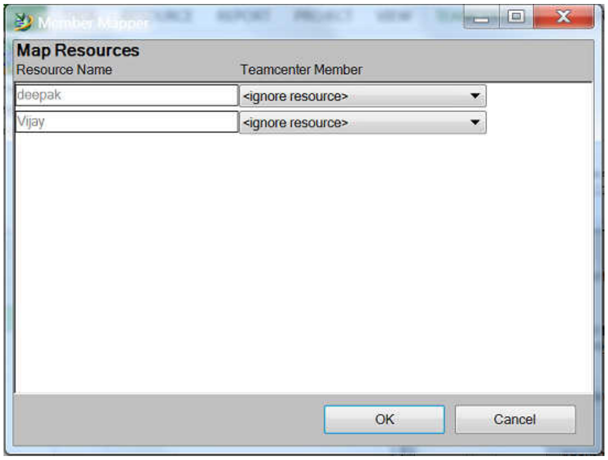
5. Do one of the following:

   - Select a schedule from the Schedule Selector and then click **OK**.
   - Use the **Schedule Name** and **Schedule ID** boxes to filter the list when a large number of schedules are displayed. Once you have narrowed the results, select your desired schedule and then click **OK**.

> Note:
>
> If more than 500 results are still displayed after you filter the results, Active Workspace prompts you to further refine your filters. This helps optimize performance of the Teamcenter Integration plugin.



6. If schedule tasks are assigned to team members in Microsoft Project that are not associated with the Active Workspace schedule, use **Member Mapper** to map the Microsoft Project team members to the appropriate Active Workspace team member.

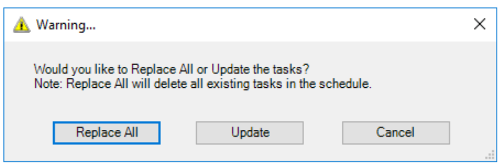


7. On the Warning dialog, do one of the following.

The Warning dialog does not display if the schedule you are exporting to Active Workspace was not first imported from Active Workspace. In this situation the process defaults to **Replace All**.

To	Do
Update the schedule's properties, add newly created tasks, or remove deleted existing tasks.	Click **Update**.

To	Do
	Note: This option does not delete existing schedule property values, but updates the schedule with the changes made in Microsoft Project.
Delete all existing property values in Schedule Manager and replace them with the changes you made in Microsoft Project.	click **Replace All**.



The schedule is exported from Microsoft Project into Active Workspace and the schedule task planning properties are updated in Active Workspace.

> Note:
>
> Schedule tasks with a State of Completed, Closed, Aborted, and other states that your administrator has identified in the SM_PREVENT_UPDATE_STATES preference are not updated.

8. Recalculate the schedule.

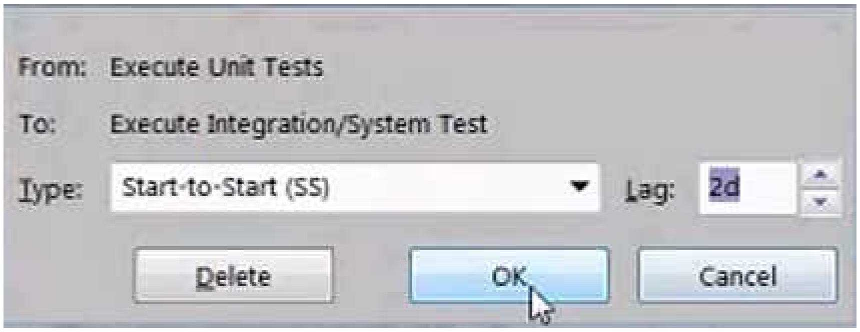
Update task dependencies when exporting schedules from Microsoft Project to Active Workspace Schedule Manager

As a Schedule Coordinator, you may need to add or delete schedule task dependencies in schedules you have imported into Microsoft Project. When you export these schedules back to Active Workspace, the associated schedule tasks can be updated with the changes you made to the dependencies.

Schedule tasks submitted to a workflow before being imported to Microsoft Project can continue moving through the workflow process while the Schedule Coordinator makes the necessary changes to the schedule tasks in Microsoft Project.

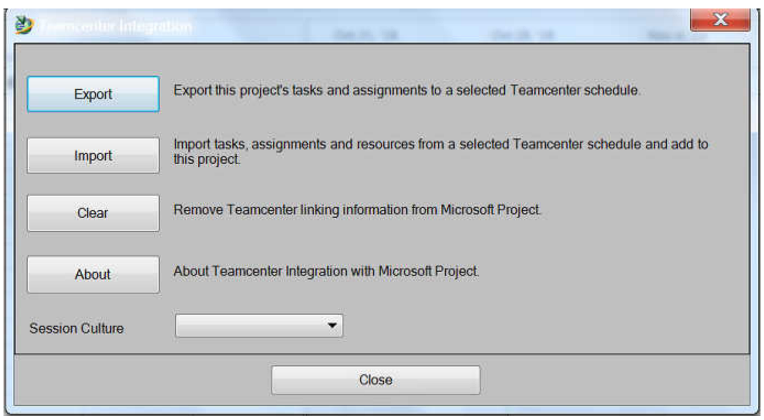
1. **Import your schedules into Microsoft Project.**

2. Create, update, or delete the schedule task dependencies in Microsoft Project. For example, you can delete a dependency between two tasks, or change the dependency type, such as changing the dependency from **Finish to Start (FS)** to **Start-to-Start (SS)**.



3. Click **Teamcenter Integration**.

4. On the Teamcenter integration screen, click **Export**.



5. Click **Update**.

   The schedule is exported to Active Workspace.

6. Open the schedule in Schedule Manager, and then recalculate the schedule to update it with the changes made in Microsoft Project.

Recalculate a schedule

As a schedule coordinator, after you have exported a schedule into Active Workspace from Microsoft Project, you should recalculate the schedule to sync the tasks and their dependencies.

1. Search for the schedule using the search box, click **SCHEDULES** on your home page, or navigate to the schedule in your folder structure.

2. (Optional) Filter the returned list to quickly find the desired schedule.

3. Click **Open**.

4. Click the **Gantt** tab.

5. On the work area toolbar, click **Recalculate**.

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