

# 3.3.2. Project Scheduling

The **Project Scheduling** document is used to define the planned start and finish dates of project tasks. It helps structure the timeline and is essential for-

- Tracking the sequence and duration of tasks.
- Providing visibility into the **planned timeline** of the entire project.
- Supporting communication between the project estimation and execution phases.

**Note-** This option becomes available only when **"Use Advanced Project Planning"** is enabled in both the **Contracting Settings** and the **Project's Main Parameters** page.

The screenshot shows the 'Contracting' settings page. On the left is a navigation menu with categories like CRM, Sales, Purchasing, Warehouse, Production, Money, Project Costing, HR & Payroll, Asset Management, Accounting, Taxes, Analysis, Process Management, Administration, and Telegram. The main content area is titled 'Contracting' and contains several sections: 'HR & Project Progress', 'Annual Maintenance Contracts', 'Task Management', 'Cash Flow', and 'Estimates'. Under 'Estimates', there are three dropdown menus for folder defaults: 'Services for Positions', 'Services for Fixed Assets Categories', and 'Other Operating Expenses'. Below these are three checkboxes: 'Use Specifications for Project Estimates' (checked), 'Use Variation Estimation Acceptance' (unchecked), and 'Use Advanced Project Planning ?' (checked and highlighted with a red box). The 'Project Invoicing' section includes 'Use Progressive Invoicing ?' (checked), 'Use Project Progress Billing Deductions' (checked), 'Use Milestone Invoicing' (checked), and 'Use business processes and tasks ?' (checked).

The screenshot shows the 'Main Parameters' tab for a project titled 'REPLACE FIRE FIGHTING PUMPS (Project)'. The page has a top navigation bar with tabs like 'Main', 'Accepted Variation Rows', 'Budget Estimates Versions', 'Cash Flow Plan Versions', 'Project Estimates Versions', 'Project Notification Settings', 'Project Schedule Versions', and 'More actions...'. Below the navigation bar are buttons for 'Save and close', 'Save', 'Generate', and 'More actions'. The 'Status' section shows 'New', 'Active', 'Completed', and 'Cancel' buttons. The main form area contains several fields: 'Description' (REPLACE FIRE FIGHTING PUMPS), 'Folder', 'Code' (MEP00000004), 'Entity' (MRB Engineering and Contracting), 'Project Type' (MEP), 'Customer' (Times Security LLC), 'Project Manager' (Yusuf), 'Contract' (# 090825 (AED)), 'Main Contractor' (New Standard Gulf FZCO), and 'Consultant' (Mr. Otman). There are also fields for 'Planned Start Date', 'Finish', and 'Duration' (0). At the bottom, there are checkboxes for 'Use Advanced Project Planning ?' (checked and highlighted with a red box) and 'Manual Project Tasks Statuses Tracking' (unchecked). An 'Additional Information' text area is at the very bottom.

## 1. How to Create the Project Schedule

This document can be created in two ways-

- **From the Project screen** directly.

REPLACE FIRE FIGHTING PUMPS (Project)

[Main](#)
[Accepted Variation Rows](#)
[Budget Estimates Versions](#)
[Cash Flow Plan Versions](#)
[Project Estimates Versions](#)
[Project Notification Settings](#)
[Project Schedule Versions](#)
[More actions...](#)

[Save and close](#)
[Save](#)
[Generate -](#)
[More actions -](#)
[?](#)

Status: [New](#) **Active** [Completed](#) [Cancel](#)

[Main Parameters](#)
[Project Team](#)
[Project Tasks \(WBS\)](#)
[Project Finance](#)
[Project Documents](#)

[Edit Project Scheduling](#)
[Create New Project Scheduling](#)

[Project Schedule](#)
[Gantt](#)

[Export BOQ To File](#)
[Export Schedule To File](#)

[More actions -](#)

Code	Project Task	Weight	Progress	Planned Start Date	Planned Finish Date	Plan Days	P
	<b>Project</b>	100.00	20.833	7/12/2025	8/31/2025	89	
1	DETAIL DESIGN & ENGINEERING FIRE FIGHTING PUMP UL-LISTED	8.33	20.000	7/12/2025	7/22/2025	11	
2	MOBILIZATION	8.33	20.000	7/21/2025	7/24/2025	4	
3	CONSTRUCTION SCOPE	66.67	21.250	7/18/2025	8/31/2025	74	
4	MCC & PMCC	8.33	20.000				
5	DEMOBILIZATION	8.33	20.000				

- **From the Costing Module-**  
Go to **Project Costing Project Management Documents Project Scheduling**

Quick menu

CRM

Sales

Purchasing

Warehouse

Production

Money

**Project Costing**

HR & Payroll

Asset Management

Accounting

Taxes

Analysis

Process Management

Administration

Telegram

### Project Costing Documents

- Project Estimates
- Project Costs Allocations
- Phased Revenue Recognitions
- Project Budgets
- Project Cash Flow Plan
- Project Statements of Account

### Project Management Documents

- Project Damages/Losses Report
- Project Item Pricing
- Project Scheduling**
- Requisitions
- Request for Information (RFI)
- Resource Planning Document
- Resource Planning Document Adjustments
- Time Cards

### Project Progress

- Project Progress Reports
- Payment Applications Issued
- Payment Certificates Received

## 2. Scheduling Document

When creating a new Project Scheduling document, the system automatically pulls the structure from the previously created Estimation. The user can then modify and adjust the schedule as needed.

### Main tab

The **Main** tab is used to define general and essential details-

- **Project**- The name of the project for which scheduling is done.
- **Project Schedule**- The name of the schedule version.
- **Responsible**- The person in charge of this schedule.
- **Entity**- The Entity handling the project.

Project Scheduling ME0025-00000001 dated 7/11/2025 10:38:04 AM \*

Main Approvals History of Approval History of Object Status Changes Taken Decisions

Post and close Save Post [edit] [notifications] [Dr Cr] [print]

Main Project Structure (Filled)

Project: REPLACE FIRE FIGHTING PUMPS Number: ME0025-00000001 Date: 7/11/2025 10:38:04 AM

Project Schedule: Main Schedule Entity: MRB Engineering and Contracting

Responsible: Siam

## Project Structure tab

The **Structure** tab is used to define and organize the breakdown of work within a project. It serves the following purposes-

- **Task Code** - Unique identifier for each task following the WBS hierarchy.
- **Item & Content** - Name and description of the task.
- **Quantity & Unit** - Specifies the task scope.
- **Planned Start/Finish Date** - Scheduled execution timeline.
- **Plan Days** - Duration between start and finish dates.
- **Weight (%)** - Contribution of the task to the overall project progress.
- **Predecessors** - Task dependencies.

Project Scheduling ME0025-00000001 dated 7/11/2025 10:38:04 AM \*

Main Approvals History of Approval History of Object Status Changes Taken Decisions

Post and close Save Post [edit] [notifications] [Dr Cr] [print] More actions -

Main Project Structure (Filled)

View: Project structure Gantt Chart

[home] [refresh] [list] [add] [cancel] [delete] [export] [import] Search (Ctrl+F) More actions -

Code	Project Task	Planned Start Date	Planned Finish Date	Plan Days	Weight	Predecessors
	Project	7/12/2025	8/31/2025	89	100.000	
1	DETAIL DESIGN & ENGINEERING FIRE FIGHTING PUMP UL-LISTED	7/12/2025	7/22/2025	11	8.333	
1.1	DESIGN FIRE FIGHTING PUMP DESIGN FIRE FIGHTING PUMP...	7/12/2025	7/22/2025	11	100.000	
2	MOBILIZATION	7/21/2025	7/24/2025	4	8.333	
2.1	MOBILIZATION MANPOWER AND ... MOBILIZATION MANPOWER AND ...	7/21/2025	7/24/2025	4	100.000	
3	CONSTRUCTION SCOPE	7/18/2025	8/31/2025	74	66.667	
3.1	FIRE PUMP ELECTRIC, DIESEL, ... FIRE PUMP ELECTRIC, DIESEL, ...	7/18/2025	7/29/2025	12	12.500	2.1
3.2	GATE VALVE SIZE 12", GATE VALVE SIZE 12", Body: ASTM A216 ...				12.500	
3.3	PIPE GALVANIZED SEAMLESS CARBON... PIPE GALVANIZED SEAMLESS CARBON...					
3.4	PIPE SIZE 8" PIPE SIZE 8"	8/1/2025	8/31/2025	62	12.500	

*Note- This document is always connected to the most recent version of the estimation. Suppose any modifications, such as revisions or variation order, are made to the estimation. In that case, the system will detect them and notify that the current schedule is outdated, prompting an update.*

← → ☆ REPLACE FIRE FIGHTING PUMPS (Project)

Main [Accepted Variation Rows](#) [Budget Estimates Versions](#) [Cash Flow Plan Versions](#) [Project Estimates Versions](#)

**Save and close** Save Generate -

Status: New **Active** Completed Cancel

Main Parameters Project Team Project Tasks (WBS) Project Finance Project Documents

Edit Project Scheduling Create New Project Scheduling

Project Schedule Gantt

The project structure has become not relevant. Update the project structure data in the current document.

Export BOQ To File Export Schedule To File

### Gantt Chart View

A Gantt Chart is a timeline view of project tasks, showing **start & end dates**, **duration**, and **dependencies**.

Allows **drag-and-drop** of tasks to set dependencies.

Supports **predecessor linking** (Finish-to-Start, Start-to-Start, etc.)

Indicators (x) help users identify cancelled or cancellation BOQ lines, which are not actual in the latest Project Estimates document.

← → ☆ Project Scheduling (create) \*

Main [Approvals](#) [History of Approval](#) [History of Object Status Changes](#) [Taken Decisions](#)

**Post and close** Save Post More actions -

Main Project Structure (Filled)

View: [Project structure](#) [Gantt Chart](#)

Print Gantt Chart

Scale:  Year  Quarter  Month  Week  Day

Refresh

Code	x	Project Task	Planned Start Date	Planned Finish Date	P
		Project	6/30/2025	8/31/2025	
1		DETAIL DE...	7/12/2025	7/22/2025	
1.1		DESIGN FI...	7/12/2025	7/22/2025	
2		MOBILIZAT...	7/21/2025	7/24/2025	
2.1		MOBILIZAT...	7/21/2025	7/24/2025	
3		CONSTRU...	7/18/2025	8/31/2025	
3.1		FIRE PUM...	7/18/2025	7/29/2025	
3.2		GATE VAL...			
3.3	x	PIPE GALV...			
3.4		PIPE SIZE 8"	8/1/2025	8/31/2025	

Timeline view showing tasks from June 2025 to August 2025. A red dashed line indicates the Current Date. Task 3.3 is marked with a red 'x' in a box.

### 3. To-Do Items

To-do items are internal tasks linked to specific project tasks or revenue line items. They are not visible to the client but help track internal work progress. The "Add To Do Item" button becomes available when the "Use Business Process and Tasks" option is checked in **Contracting Settings**.

← →
☆ Contracting

[HR & Project Progress](#)

[Annual Maintenance Contracts](#)

[Task Management](#)

[Cash Flow](#)

[Estimates](#)

Folder for "Position" Items (by Default):

Folder for "Fixed Asset Category" Items (by Default):

Default Overheads Expense Item:

Use Specifications for Project Estimates  
 Use Variation Estimation Acceptance  
 Use Advanced Project Planning ?

[Project Invoicing](#)

Use Progressive Invoicing ?  
 Use Project Progress Billing Deductions  
 Use Milestone Invoicing

Use business processes and tasks ?

[Approvals](#)

Manage business processes and assign tasks to users. ×

It represents the internal steps the team must take to complete those deliverables. It can be created per project task or revenue line.

← →
☆ Project Scheduling (create) \*
🔗 Conversat

Main [Approvals](#) [History of Approval](#) [History of Object Status Changes](#) [Taken Decisions](#)

Post and close
Save
Post
📄
🔔
Dr Cr
📄

Main [Project Structure \(Filled\)](#)

View: [Project structure](#) [Gantt Chart](#)

🏠
📄 Add To Do Item
🗑 Cancel To Do Item
🗑 Delete
📄 Export Schedule To File
📄 Import Schedule From File
🔍 Search (Ctrl+F)
✕
Mo

Code	Item	Content	Q...	UOM	Planned Start Date	Planned...	Plan Days	Weight	Predecessors
⊖	Project				6/30/2025	8/31/2025	104	100.000	
⊖	1	DETAIL DESIGN & ENGINEERING FIRE FIGHTING PUMP UL-LISTED			7/12/2025	7/22/2025	11	8.333	
⊖	1.1	DESIGN FIRE FIGHTING PUMP	DESIGN FIRE FIGHTING ...	1...	Pcs	7/12/2025	7/22/2025	11	100.000
⊖	2	MOBILIZATION			7/21/2025	7/24/2025	4	8.333	
⊖	3	CONSTRUCTION SCOPE			7/18/2025	8/31/2025	74	66.667	
⊖	4	MCC & PMCC						16.667	
⊖	5	DEMOBILIZATION			6/30/2025	7/14/2025	15		

- **Duty**- Describes the task to be done..
- **Assign to** - Select who is responsible, an individual or a team member.
- **Priority**- Sets urgency level (e.g., High, Medium, Low).
- **Planned Start Date**- When the task is scheduled to begin.

- **Due Date**- Deadline for completion.
- **Project**- Links the task to its parent project.
- **Project Task**- Connects to a specific scheduled item in the master plan.
- **Weight**- Indicates task's importance or contribution to project progress (expressed as a percentage).
- **Topic**- Reference section for categorization or discussion thread.
- **Author**- Person who created the task entry.
- **Start Date** (*bottom field*)- When work was initiated (can differ from planned).
- **Revision**- Optional field for assigning the task to an administrator to track edits or version control.

☆ Project To Do (create)
🔗 ⋮ □ ×

Main
To Do Item Progress

Start and close
Save
Start
⌚
📌 Enter Progress
🔗
📄 Tasks
More actions -

Duty: 
Priority: Normal ▾

Assign to:  ...
Planned Start Date:  / / 
Due date:  / / 
⌛

Project: REPLACE FIRE FIGHTING PUMPS 
Project Task: DETAIL DESIGN & ENGINEERING FIRE FIGHTII 
Weight: 1.00

Topic: not specified

Assign revision to Administrator ...
 Due date:  / / 
⌛

Author: Administrator ▾ ...
Started on: 7/13/2025 5:02:01 PM

#### 4. Import & Export

The system allows data import/export from the scheduling screen-

**Export Schedule to File** - Saves the current schedule (task names, planned dates, dependencies) into an Excel file; useful for sharing, external editing, or use in other software.

**Import Schedule from File** - Allows users to upload an Excel file with planning data (start/finish dates, dependencies).

*Please note- **Import/Export** tools allow you to manage scheduling data in Excel, but changes apply only to dates and links, not the project structure.*