SDEF SCHEDULE PRO

User's Manual

Last Updated: 4/13/2019

Contents

Introduction

About Us

SDEF Schedule Pro is a cloud-based application providing a turnkey solution for users needing to create no-nonsense construction schedules. Once your schedule is created, SDEF Schedule Pro allows easy export of SDEF data with one mouse click. No extra setup needed.

The SDEF (Standard Data Exchange Format) format was developed by the US Army Corps of Engineers (USACE) to facilitate the free and open exchange of scheduling data for construction contracts. The specification for SDEF includes information on activities, features of work, subcontractors and other related information. Our software was designed from the ground up to make building a USACE schedule simple and affordable.

Unlike other scheduling software, our software does not require special activity code structure setup and meets the requirements of the U.S. Army Corps of Engineers ER 1-1-11.

Pricing

SDEF Schedule Pro uses subscription-based pricing based on the number of activities in your project. We offer 2 free-month discounts for subscribing annually versus monthly subscriptions.

Our prices for our most popular packages are listed below:

Standard Project	Standard+ Project	Mega Project
$39.99 per month	**$59.99** per month	**$99.99** per month
- or -	- or -	- or -
$399 per year (2 free months)	**$599** per year (2 free months)	**$999** per year (2 free months)
Up To 250 Activities	Up To 500 Activities	Up To 1,000 Activities
Unlimited Collaborators	Unlimited Collaborators	Unlimited Collaborators
Permissions Control	Permissions Control	Permissions Control
SDEF Import and Export	SDEF Import and Export	SDEF Import and Export
Buy Now	Buy Now	Buy Now

Using Your SDEF Schedule Pro Account

Create a new Account

To Create a new account, simply head to our home-page (<u>click here to start</u>).

1. Click the Register button.
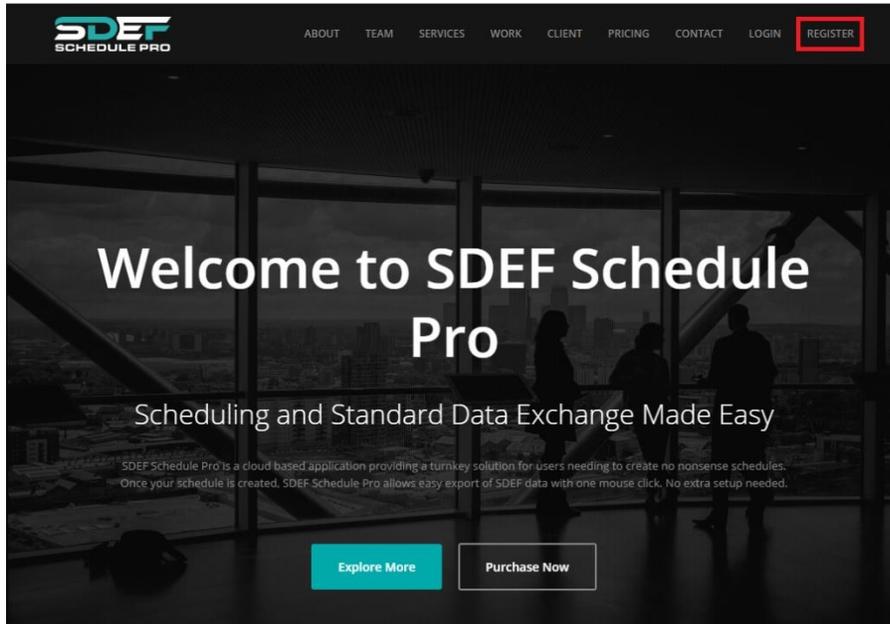
2. Fill out the Registration Form, including your desired password, then click 'Register'.

Please note the password requirements below:

-Must be larger than 6 characters

-Contain at least one special character(!, @, #, $, etc.)

-Contain at least one number (0-9)

-Contain at least one uppercase character

3. After your account has been registered, you will need to confirm your email to log in. Head to the inbox of the email you used to register your account, then follow the instructions listed in the email to finalize your account.

Please note that login will not work until after you have verified your email.
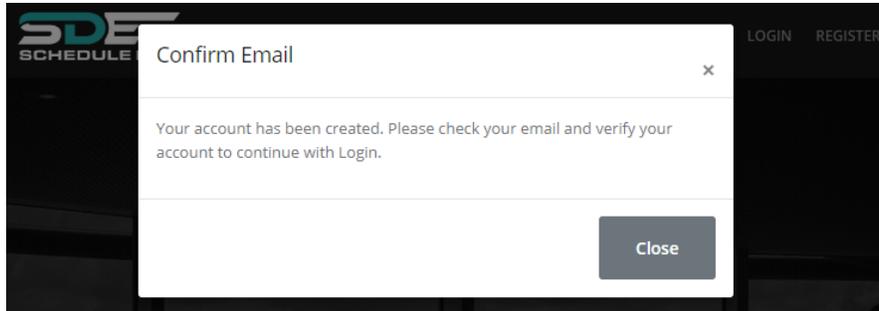
4. Congratulations! Your account is now officially all set up.

Getting Started with Projects

Create a new Project

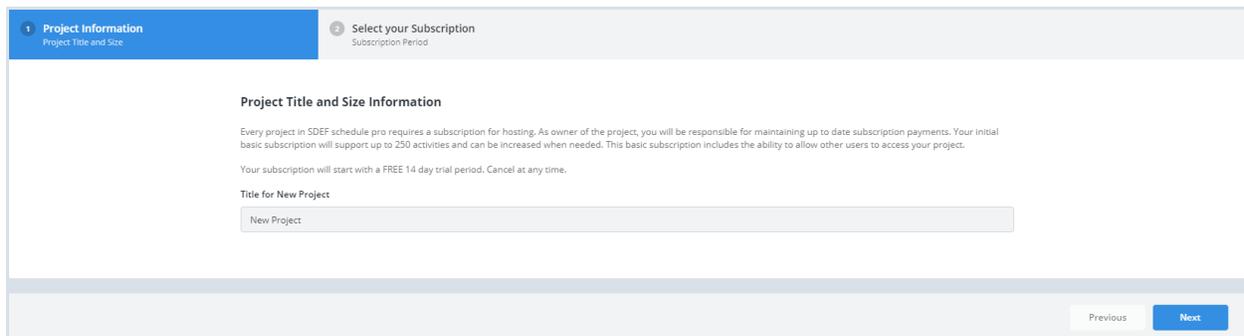To create a new project, Login to your account to get to the Project Selection View, then follow the steps below:

1. Click the "Crete new Project" link on the Project Selection View

2. Enter a Title for your new Project, then click the Next Button.

3. Enter a method of payment, then choose your subscription type. Currently, we offer a monthly subscription type and an annual subscription type. By choosing the Annual subscription, you save 20%. Regardless of which option you select, you can choose to cancel at any time so that future charges do not occur when your subscription period comes to an end.

Collaborate on an Existing Project

If a project has already been set up and paid for by someone else, they may choose to invite you to collaborate on the project for no additional costs. SDEF Schedule Pro allows an unlimited number of project contributors. To collaborate on a project, follow the steps below:

1. Have a person who is already part of the project invite you to the project. The steps for inviting other users to a project can be found by clicking here.

2. Create your account, verify your email, then sign into your account. (help setting up an account)

3. After sign-in, you will be taken to the project selection view. If you have been invited to the project, you should see pending invitations on the project selection view.

Project Selection View

Create New Project
1 Pending Project Invitations

4. Click the "Pending Project Invitations" link, then accept or reject any invitations.

Pending Project Invitations

ProjectTitle

West Wind Dam   ✔ Accept Invitation   Reject Invitation
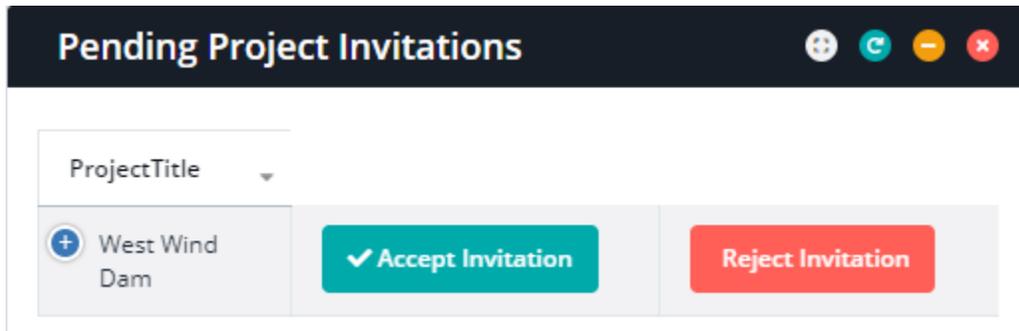
5. After accepting the invitation, you will be taken back to the project selection view where you should now see the project.

Inviting other Users to your Project

SDEF Schedule Pro allows an unlimited number of project contributors. If you would like to give access to another person to view your project, you can do so by following the steps below:

1. Log in to your account and Open the Project.

2. Click the Project Permissions button on the left navigation panel
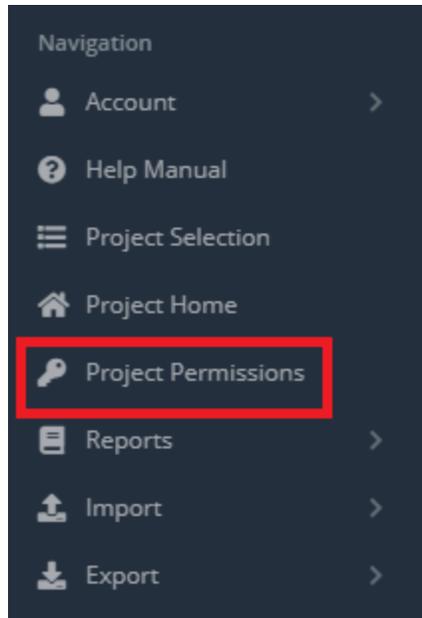
3. Click the Add button on the Project Users Grid


4. Enter the email of the person you would like to invite to the project, then give them any combinations of project permissions you would like. If an account does not already exist for the specified email, we will send the user an invitation to create an account. If the user already has an account, they will see a pending project invitation on their project selection screen.

Creating a Project Schedule

Follow the simple twelve steps below to create a project schedule. All twelve steps are shown in order below:

1. Enter project Information

2. Enter CLIN Information

3. Enter Subcontractor Information

4. Create Features of Work

5. Create Work Categories

6. Create Phases

7. Enter Calendar Information

8. Create Work Areas

9. Create Activities and Link each Activity to CLINs, Subcontractors, Features of Work, Work Categories, Phases, Calendars, and Work Areas created in steps 2-8 .

10. Use Gantt control to create Activity Relationships and Calculate Dates

11. Prepare a Payment

12. Exporting an SDEF File

SDEF Schedule Pro also includes a quick guide on the project dashboard with free videos explaining each step of the process.
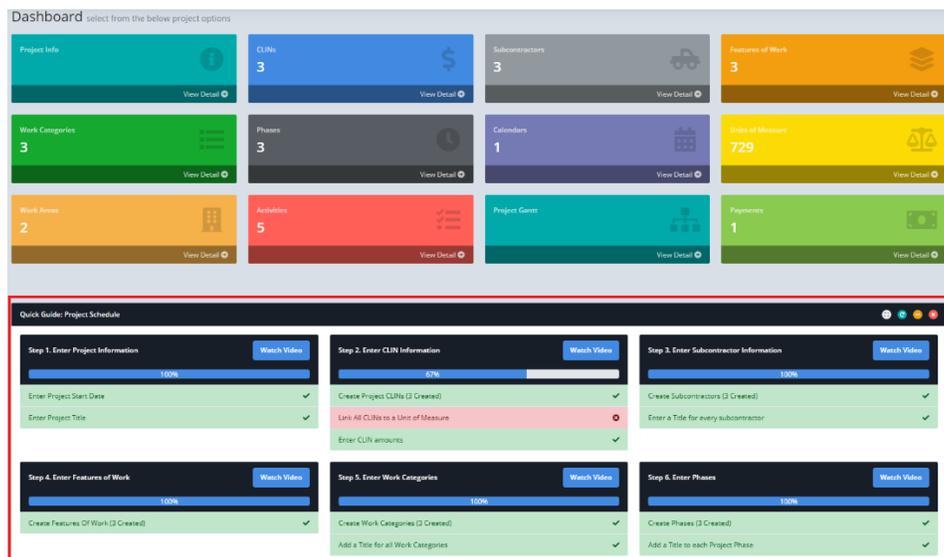
If you are switching to SDEF Schedule Pro from another scheduling program, you can easily transfer your project data by performing an SDEF Import. Please note that the import will completely overwrite the current project.
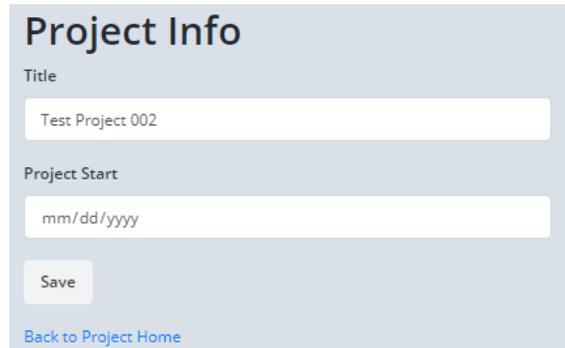
Entering Project Information

1. Click the "View Detail" button on the Project Info Tile on the

Project Dashboard.
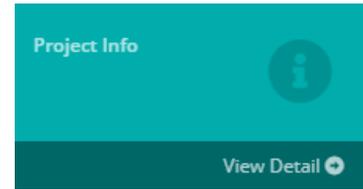
2. Enter a Project Title and a Project Start Date then hit Save.

The project start date is the date is required to start building your schedule.

CLIN Information

What Are CLINs?

CLIN stands for Contract Line Item Number. They are used to break the contract down into separate products and services. When you are awarded a contract, all the CLIN information will be given to you.

You will need the following information for every CLIN you use on your schedule:

1. CLIN Number

2. Either

       a. Total Cost

       b. Unit Price and Unit Quantity (ex. $.40 per pencil X 100 pencils= $40 Total Cost)

4. Unit of Measure

The selected Unit of Measure attached to the CLIN will determine whether you enter the Total Cost directly, or a Unit Price and Unit Quantity.

Entering CLIN Information

1. Click the "View Detail" button on the CLINs Tile on the

Project Dashboard.
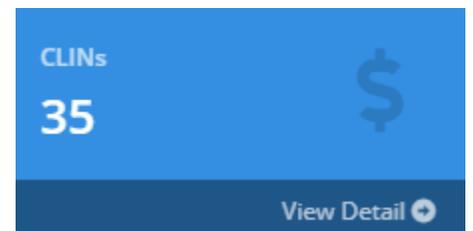
2. Click the Add Button on the CLINs Grid

3. Enter a CLIN Number.

If this is a USACE project, make sure to pad the CLIN number with 4 places. CLIN 1 should be entered as CLIN 0001.

4. Enter a title, then select a Unit of Measure using the Unit of Measure lookup. If you are unsure which Unit of Measure to use, ask a contract specialist who worked on awarding your contract.

5. If the selected Unit of Measure is Unit Priced, then enter the Unit Price and Total Quantity fields as specified in your contract.

If the selected Unit of Measure is no Unit Priced, then enter the total cost as specified in your contract.

Subcontractors

What is a Subcontractor?

The subcontractor section should include the prime contractor and all subcontractors who will be completing activities on the project. The prime contractor is the contractor who was awarded
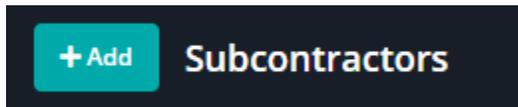
the project. The prime contractor should be given a record with a responsibility code of 'PRIM'. All other contractors can be given user defined 4-character values.

Create a Subcontractor

1. Click the "View Detail" button on the Subcontractors Tile.

2. Click the Add button on the Subcontractors Grid

3. Enter the full name of the contractor, along with a user-defined Responsibility Code. This can be any unique ID up to 4 characters long.

4. Click the [Create] button.

Features of Work

What is a Feature of Work?

A Feature of Work is a task that is separate and distinct from other tasks and has control requirements and unique works crews for that task. Some examples of features of work include "underground piping", "interior plumbing", "electrical wiring", "grubbing and clearing".
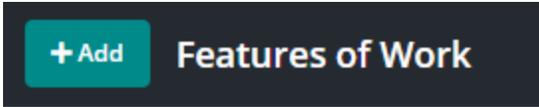
Creating Features of Work

Creating a Feature of Work is quick and simple.

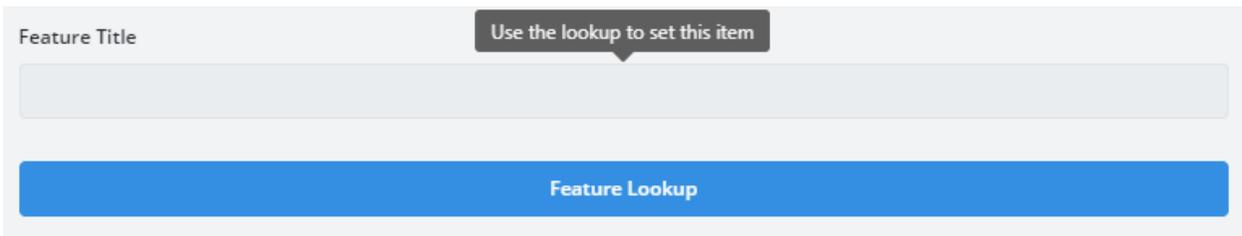1. Click the "View Detail" button on the Features of Work Tile.

2. Click the Add button on the Featues of Work Grid

3. Enter a Title in the form, then click "Create".

Linking Features of Work to an Activity

After you have created features of work, you will need to link them to activities. To do this, go to the Activity Edit View, and click the Feature Lookup button
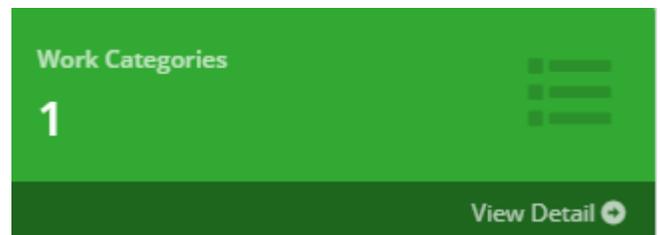

Work Categories

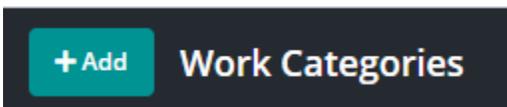### What is a Category of Work?

A Category of Work is a generic category describing the work of an activity. (Action Needed)

How to Enter a Category of Work?

1. Click the "View Detail" button on the Work Categories Tile.

2. Click the Add button on the Work Categories Grid

3. Enter the Work Category Title, then enter a use-defined custom code to represent the newly entered category title. The code can be anything you would like, however, it must be unique and can only be 1 character long.

Project Phases

What is a Project Phase?

A Project Phase is a unique phase or timeline of the project. Some examples of typical phases include, "design phase", "procurement phase", and "construction phase". Each project activity should be assigned to a phase. This means that every project must have at least one phase.

How to Enter a Project Phase?

1. Click the "View Detail" button on the Features of Work Tile.

2. Click the Add button on the Phases Grid
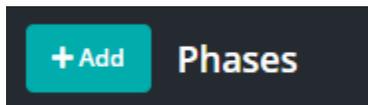
3. Enter a Phase Title and a unique user-defined Phase Code. The phase code can be anything you would like, however, it must be unique and be 2 characters or less.

Calendars

What is a Calendar?

A Calendar is a work-schedule which includes typical work days throughout the week (eg. M, T,W,Th,F,S,Su) and a list of holidays/non-work days. Using calendars creates a more accurate prediction for the project schedule by including planning around non-work days. A calendar is

assigned at the Activity level, this means that a single calendar can be re-used on multiple activities so long as each of the activities will have the same working schedule. A unique calendar should be created for each unique activity work schedule.

How to Create a Calendar?

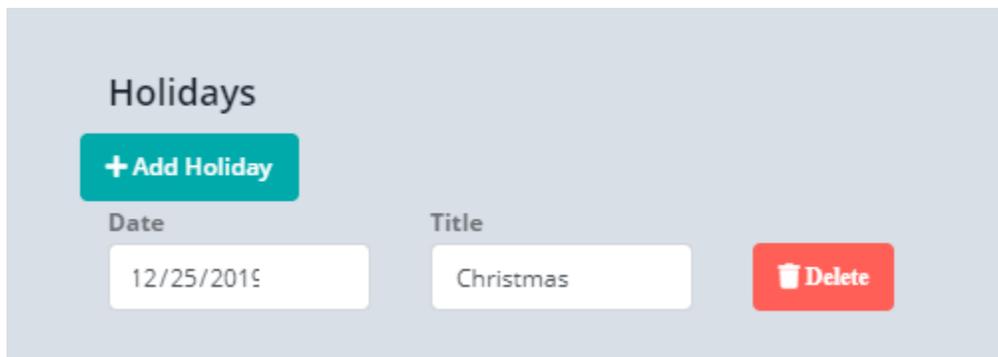1. Click the "View Detail" button on the Calendars Tile.

2. Click the Add button on the Calendars Grid
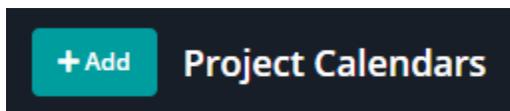
3. Enter a unique 1-character Calendar Code and Description. Finally, check off the boxes next to work days to create a typical work week schedule.

4. Enter any irregular non-work days in the Holidays grid by clicking the Add Holiday button.

5. Click the [Save] button.

Work Areas

What is a Work Area?
A work Area is a unique area in which an activity will be completed. A unique work area should be created for each area of the project in which an activity will be performed.

How to Add a Work Area?
1. Click the "View Detail" button on the Calendars Tile.

2. Click the Add button on the Work Areas Grid

3. Enter a unique 4-character Work Area Code and a Work Area Title.

4. Click the [Save] button.

Activities

What is an Activity?
An activity is specific step or process within the project. When all the activities of the project are completed, the entire project should be considered complete. All activities should be linked to a CLIN, subcontractor, feature of work, work category, phase, calendar, and work area. Linking of activities to these areas will allow for better resource planning, time/cost estimation, and project completion.

Create an Activity?

1. Click the "View Detail" button on the Activities Tile.

2. Click the Add button on the Activities Grid
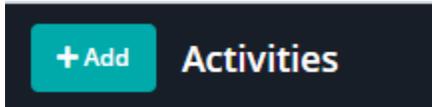
3. Enter a unique 10-character Activity Number, then enter the Title.

4. Link the Activity to a CLIN by using the CLIN lookup

5. If the CLIN selected is a unit-priced CLIN, enter Quantity of units needed to complete the activity. If the CLIN is not unit-priced, simply enter the total cost of the activity directly.

6. Link the Activity to a Calendar using the lookup.

Calendar

Calendar Code

M

Description

MAIN CALENDAR

Calendar Lookup

7. Link the Activity to a Feature using the Feature Lookup.

Feature

Feature Title

DEMOB

Feature Lookup

8. Link the Activity to a Phase using the Phase Lookup.

Phase

Phase Title

DEMOB

Phase Code

D

Phase Lookup

9. Link the Activity to a Subcontractor using the Subcontractor Lookup.

Subcontractor

Subcontractor Name

DEMOB SUB

Responsibility Code

DSUB

Subcontractor Lookup

10. Link the Activity to a Work Area using the Work Area Lookup.

WorkArea

Work Area Title

INNER

Work Area Code

I

WorkArea Lookup

11. Link the Activity to a Work Category using the Work Category Lookup.

WorkCategory

Work Category Title

DEMOB

Work Category Code

D

WorkCategory Lookup

12. Click the [Save] button.

Balancing CLINs with Activities

Balancing the total cost of CLINs with activities is one of the main reasons for creating a cost-loaded schedule. Each CLIN(Contract Line Item Number) has a total cost associated with it which will allow for invoices to be made for completed work. The total cost of each CLIN must be accounted for with one or more activities linked to the CLIN, which will appear on invoices upon completion. For example, if CLIN 0001 has a total cost of $10,000 , there should be one or more activities linked to CLIN 0001 that sum up to the $10,000. Here is one of the many possible combinations for balancing our test CLIN 0001:

CLIN 0001: $10,000

Activity Number	Activity Total	CLIN Number
ACT 1	$2,000	0001
ACT 2	$500	0001
ACT 3	$7,500	0001
TOTAL	$10,000	

Notice that there are three activities linked to CLIN 0001, The sum of all three activities is $10,000, which matches the total CLIN cost.

The fastest way to check if CLINs are balanced is to head over to the CLIN selection view where you can see a side-by-side comparison of Linked Activity Cost and CLIN Total Cost.
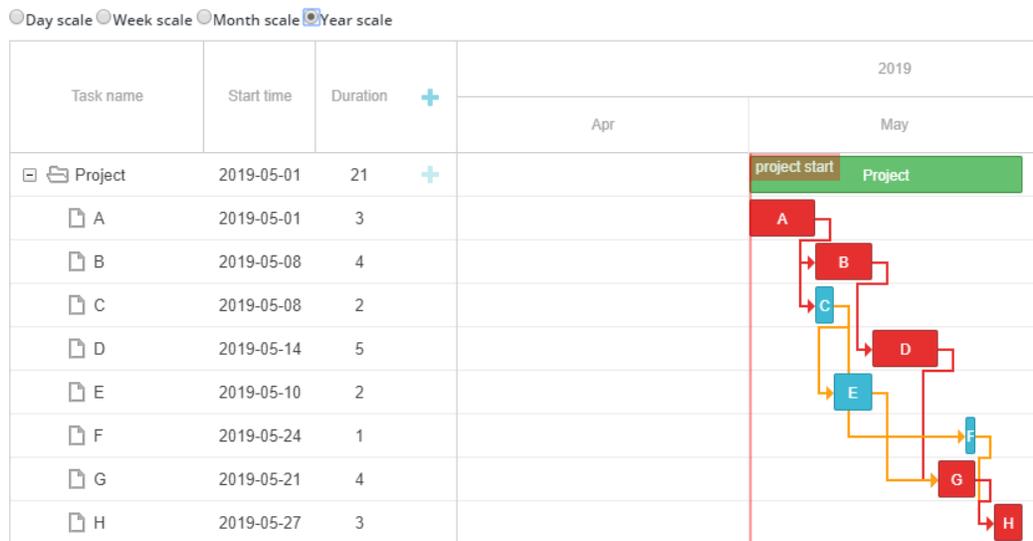
| + Add | **CLINs** |

Show 10 ▼ entries

CLIN Number	Title	Unit of Measure	Total Cost	Linked Activity Cost
0001	MOB	8P	100000.000000	100000.000000
0002	WORK	8P	500000.000000	500000.000000
0003	DEMOB	97	100000.000000	100000.000000

Showing 1 to 3 of 3 entries

Using the Gantt Chart

Gantt Chart Overview

The Gantt chart shows the earliest projected project timeline by activity (showing early start/early finish dates). The Gantt chart automatically schedules activities based on Activity Duration and the relationships between activities. You may change the duration of an activity by dragging the tail of an activity, or by double-clicking the activity. Double-clicking an activity will bring up the activity edit form as shown below:

01 May 2019 - 08 May 2019   A

Description

Text [A]

Activity Number [   ]

Time period

[1 ▼] [May ▼] [2019 ▼]   [–] [3] [+] Days 08 May 2019

[✓ Save]   [⊘ Cancel]   [🗑 Delete]

Work Day Calculations

It is important to note that the Gantt chart calculations include the calendars that are assigned to each activity. If a calendar is not assigned, the Gantt chart assumes that every day is a work-day. There is a color-status indicator underneath each task that indicates whether or not a specific day is a workday or a non-workday. Workdays display an orange status, while non-workdays display a greyed out status.

The Gantt chart will use the Activity Relationships to determine the earliest start date for an activity. Activities with no start-impacting relationships will be scheduled for the start of the project. The end date will be projected based on Activity Duration and the number of work-days scheduled in the calendar attached to the activity. This means an Activity with a duration of 2 days would last 2 weeks if the calendar attached to the activity only included a single work day per week.

For example, Thursday would be considered a workday on activity AAA, while Friday and Saturday would be considered non-workdays.
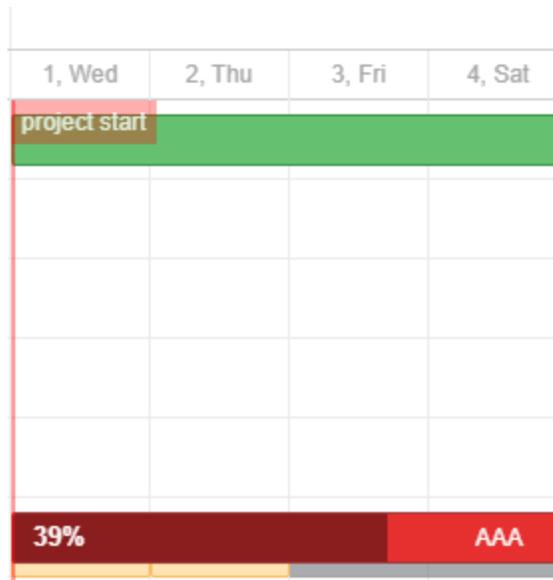
Changing the Gantt Scale

You may change the scale of the Gantt chart by using the Scale selector radio buttons above the Gantt Chart. Simply click the radio button of the scale you would like to use.
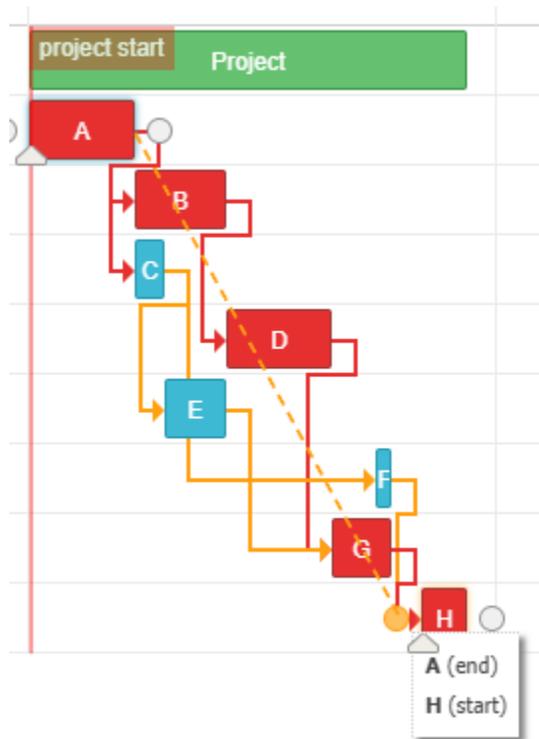

Creating Activity Relationships

To create a relationship between two activities, simply hover over an activity in the Gantt chart to expose the relationship anchors.
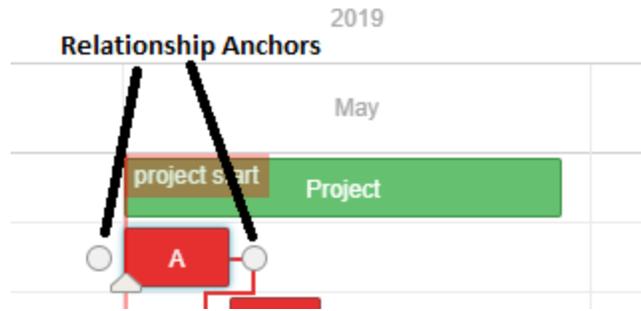
Click on a relationship anchor, then drag the mouse to the relationship anchor of another activity.

All Four types of relationships are supported between activities

1. Start to Start

2. Finish to Start

3. Finish to Finish

4. Start to Finish

Deleting Activity Relationships

To delete an activity relationship, simply double-click on the link arrow to bring up the Relationship edit view.

A -> C

Lag 0

| Save | Cancel | Delete |

From here, you can select the Delete button to remove the relationship.

Adding Lag and Lead to Relationships

It is possible to add both Lag and Lead days to an activity relationship. Simply double-click on an activity relationship arrow in the Gantt chart to bring up the Relationship Edit View.
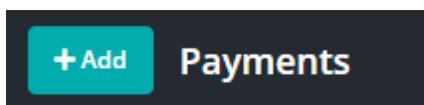
A -> C

Lag 0

| Save | Cancel | Delete |

For entering Lead days, simply enter a negative Lag value (ex. -6, -9, etc).

Creating Payments

Payments
1
View Detail ●

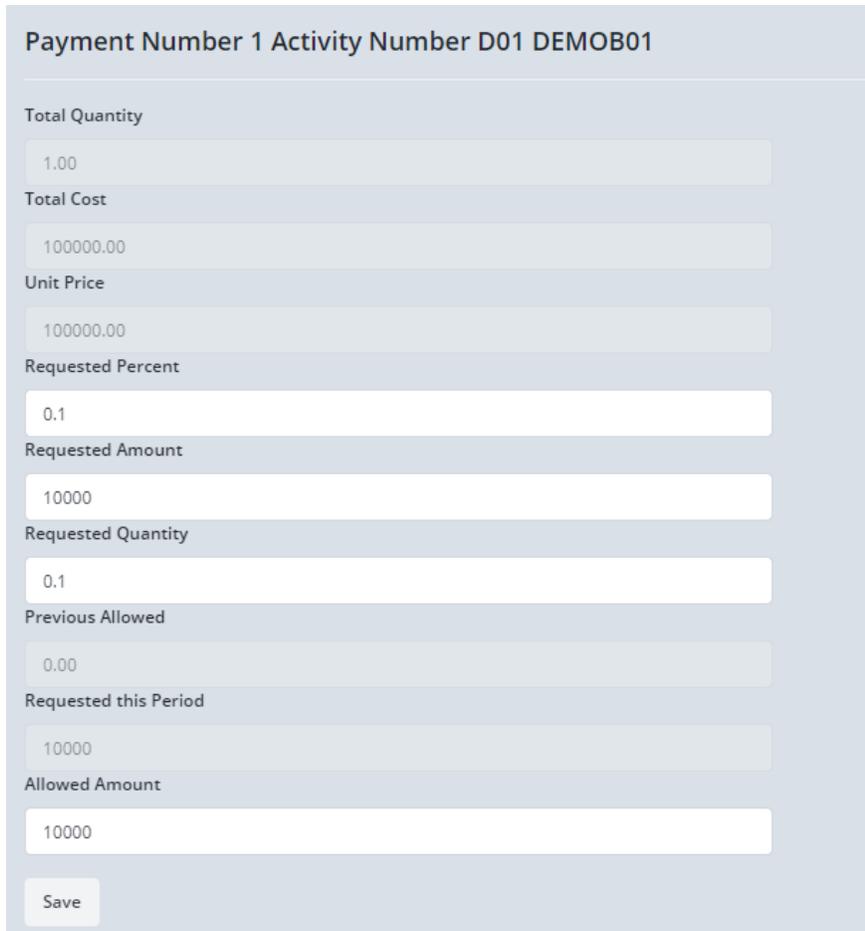1. Click the "View Detail" button on the Payments Tile.

2. Click the Add button on the Payments Grid.

+ Add   Payments

3. Enter the Pay Period From and Thru Dates, then click the [Save] button.

4. After saving, you will be taken to the payment selection view, simply click on the Edit button for the payment you just created.

5. Analyze all the activities in the "Activities For Payment" Grid. Click the Edit button for all activities with work performed during the Pay period From – Thru range.

Upon clicking Edit, you will be taken to the screen displayed below:

The Requested percent is the percentage (value of 0 to 1) of work completed for the subject activity. Changing the requested percent will automatically change the Requested Amount and Requested Quantity proportional to the amount of work completed.

The Allowed Amount is the actual approved amount that will be included on the payment. Generally, this amount is set by a contract specialist who must first review the requested amount and concur that the work claimed has actually been completed. If there is a disagreement, the allowed amount will be used in place of the requested amount.

Creating an SDEF Export

Creating an SDEF Export has never been simpler.

1. Simply head to the Project Home Dashboard and open the Project Gantt view by clicking the "View detail" button in the Project Gantt Tile. This will refresh all the scheduled dates, ensuring you will have the latest information in your export.

2. Click the "Export" dropdown on the left navigation panel.
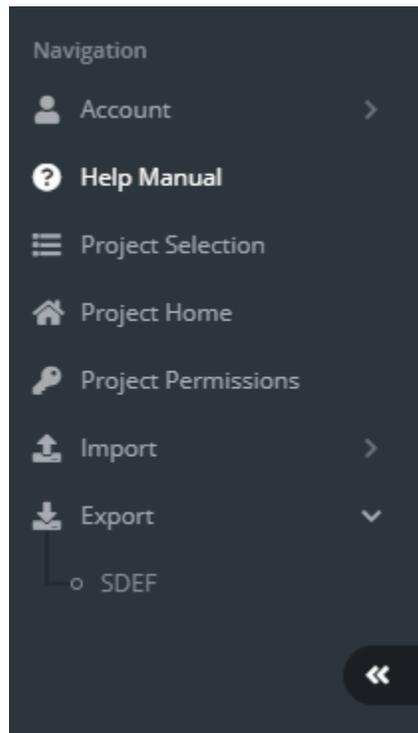
Click the SDEF option in the dropdown list, and wait for the download to complete. Congratulations! You have now completed a draft of your cost loaded schedule.