

Project Scheduling

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Feature Summary	2
Overview	3
Defining Actions	5
Entering Project Schedules	7
Viewing the Project Schedule Chart	10
Printing the Project Schedule Chart	11

Project Scheduling

Feature Summary

Studio Project Scheduling allows you to track activities for design projects. You define activities and then enter estimated starting and completion dates. It's that simple.

Setup Standard Actions with Action Dates

- Define a standard list of actions you may want to schedule
- Define the number of days before an action begins
- Define the number of days an action takes to complete

Enter and Maintain Schedules

- Enter reminders with actions and attach them to design project items
- The predefined actions automatically define the estimated starting and completion dates

Manage Project Schedules

- Manage construction time lines
- Manage sub contractors and their work schedules
- Manage the manufacturing of interior furnishings
- Manage delivery and shipping schedules

View the Project Schedules

- View the timeline with a click of the mouse
- Filter the schedule by client, project, room, item, employee, vendor and more
- Easily change the starting and estimated completion dates
- Toggle from edit mode to graphic mode

Print the Project Schedules

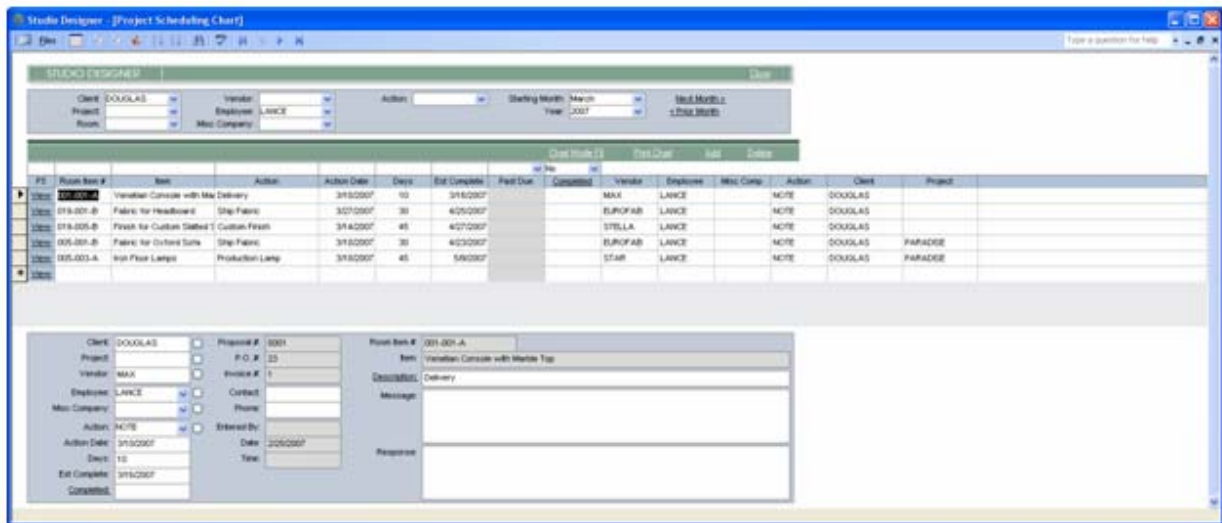
- Print and email the project schedule timelines

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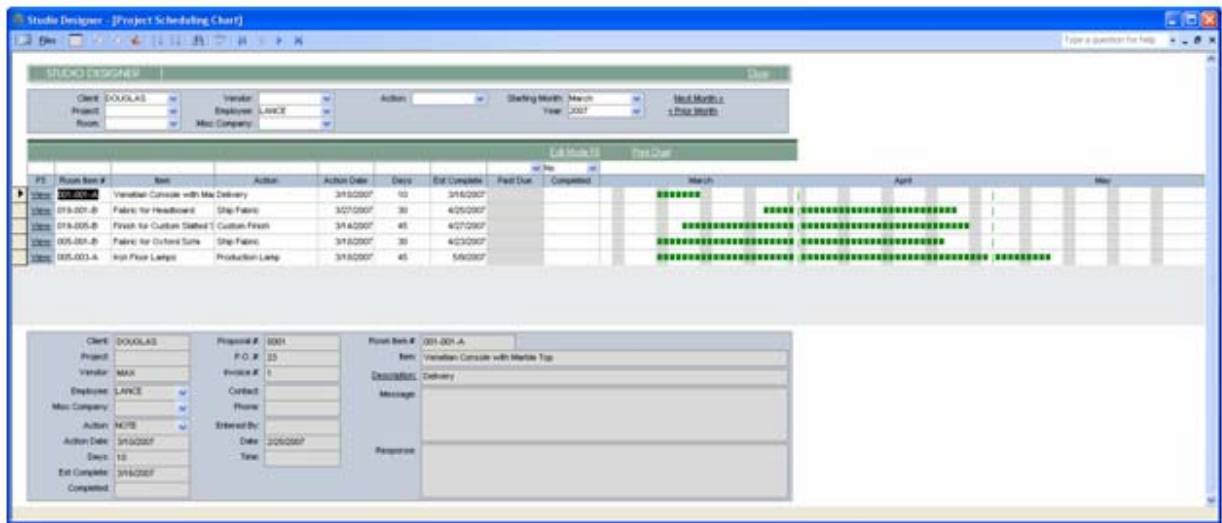
Project Scheduling

Overview

Project schedules are created using reminders attached to design project items. Each reminder has an action associated with it. Actions automatically fill in the starting and estimated completion date for the reminder. You can change the starting and estimated completion date at any time. After the project schedule is established, you can view or print the project timeline.



Select the chart button and the project timeline is displayed.



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Select the print button to print the project timeline.

Project Schedule			Client: DOUGLAS	Mr. & Mrs. Brian Douglas						
			Project:							
Item/Item #	Item	Action	Date	Days	January	February	March	April	May	June
Entry										
001-001-A	Venetian Console with Mirr	Delivery	3/13/2007	10			=====			
Master Bedroom										
019-001-B	Fabric for Headboard	Ship Fabric	3/27/2007	30			=====			
019-005-B	Finish for Custom Stuffed	Custom Finish	3/14/2007	45			=====	=====		

3/15/2007
11:53 AM

Page 1 of 3

Project Scheduling

Defining Actions

Actions are initially setup to define standard tasks you may want to schedule. Actions define the default starting and estimated completion dates for the task. You should create a basic list of actions before you begin using project scheduling.

To enter actions

- Select the **Reminders** tab at the top of the main menu
- Select the **Action** button to the right of the action field at the bottom of the reminders screen
- The actions screen is displayed

The screenshot shows the 'Action' dialog box with a table of actions and a form for editing a selected action.

	Action	Description
Select	CFA	Request Cutting for Approval
Select	CFA APPROVE	CFA Approved
Select	COM	Check to see if COM arrived
Select	COM ARRIVE	COM Arrived
Select	EMAIL C	Email Client
Select	EMAIL V	Email Vendor
Select	NOTE	Note
Select	PHONE	Phone
Select	RESERVE	Place a Reserve on Fabric
Select	SHIP TO	Advise ship to address
* Select		

Form fields for the selected action:

- Action: CFA
- Description: Request Cutting
- Action Days: 0 (The number of days added to the Current Date to define the Action Date)
- Est Days: (The number of days added to the Action Date to define the Estimated Completion Date)
- Priority: 1 (1 Green, 2 Yellow, 3 Red)
- Automatic: No (Is an action automatically created for this type of action)
- Email Client: No (Is the email automatically set to the client for this type of action)
- Email Vendor: No (Is the email automatically set to the vendor for this type of action)
- Responsible: (The default employee for this type of action)

The actions screen displays the default list of actions included with Studio Designer. You may delete the actions and start with a blank list or use the default list as a starting point.

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To enter a new action

- Select **Add**
- A blank action record is displayed at the bottom of the screen
- Enter the action information

After you enter the list of standard actions, you are ready to begin using the project scheduler.

Project Scheduling

Entering Project Schedules

Project schedules are defined by reminders attached to items in design projects. Each reminder has an action associated with it. The action defines the default starting and estimated completion date.

Reminders can be attached to items two ways

- Add a reminder to a design project item in the item screen
- Add a reminder in the project scheduling screen

The following defines how to attach a reminder to an item in the item screen

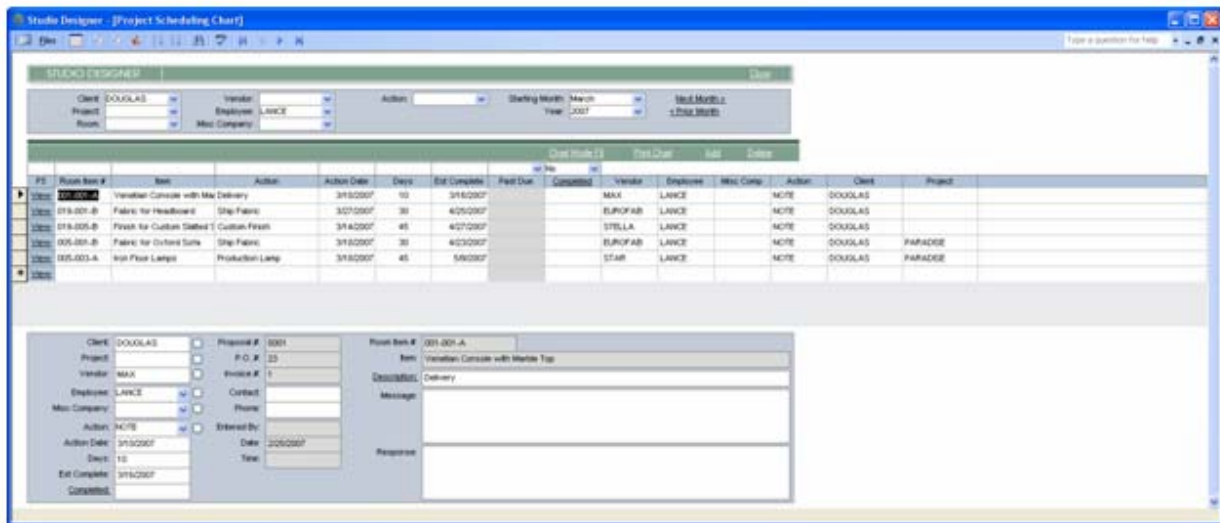
- Select the **Design Projects** tab from the main menu
- Enter the **Client** you want to view
- Select **View** item
- Select the **Reminders** tab on the item screen
- The reminders screen is displayed at the bottom of the screen
- Select **Add** to add a new reminder
- Enter the **Action**
- Optionally change the **Action Date** and **Days to Complete**

Costs		Reminders	Payments	Specification	Image Duplicate Sales Tax 100% Deposit					
Priority	Action	Date	Action Date	Days	Completed	Description	Employee	Email	Emailed	
▶	<input type="checkbox"/> NOTE	2/25/2007	3/27/2007	30		Ship Fabric	LANCE	▼	▼	
	<input type="checkbox"/> CFA APPROVE	2/25/2007	2/25/2007		2/25/2007	CFA Approved	LANCE	▼	▼	
*	<input type="checkbox"/>	▼					▼	▼	▼	

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The following defines how to attach a reminder to an item in the project scheduling screen

- Select the **Reminders** tab from the main menu
- Select **Project Scheduling**
- Select **Add** to add a new reminder
- The design project item screen is displayed
- Select the item you want to attach the reminder to
- Enter the **Action**
- Optionally change the **Action Date** and **Days to Complete**



The key to project scheduling is defining the

- Action date, the date the action begins
- Days, the numbers of days the action will take to complete
- Est complete, the estimated completion date

The action date, days and estimated completion date can be changed at any time. Open the project scheduling screen. Enter the filter criteria to view the entries you want to adjust. Make the appropriate changes and then view the project timeline.

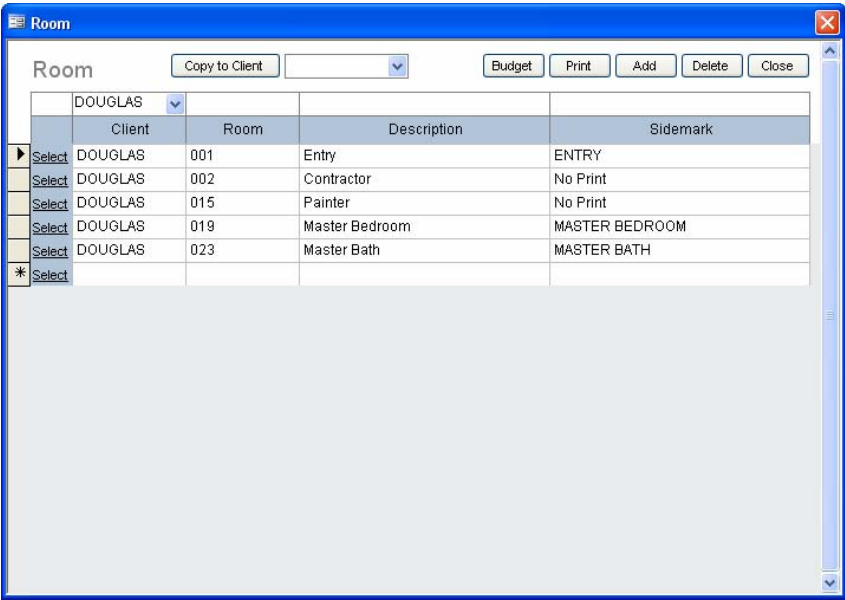
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You can also setup rooms and items to track contractors and subcontractors. Setup a room named construction and create items named plumbing, electrical and painting. Then you can enter and track starting and estimated completion dates for contractors.

If you setup new rooms for contractors, you may not want the new room to print on project worksheets. You can prevent rooms from printing on project worksheets by setting the sidemark to No Print.

To prevent a room from printing on project worksheets

- Open **Studio Designer**
- Select **Files**
- Select **Rooms**
- Move to the room you don't want to print
- Change the sidemark to **No Print**



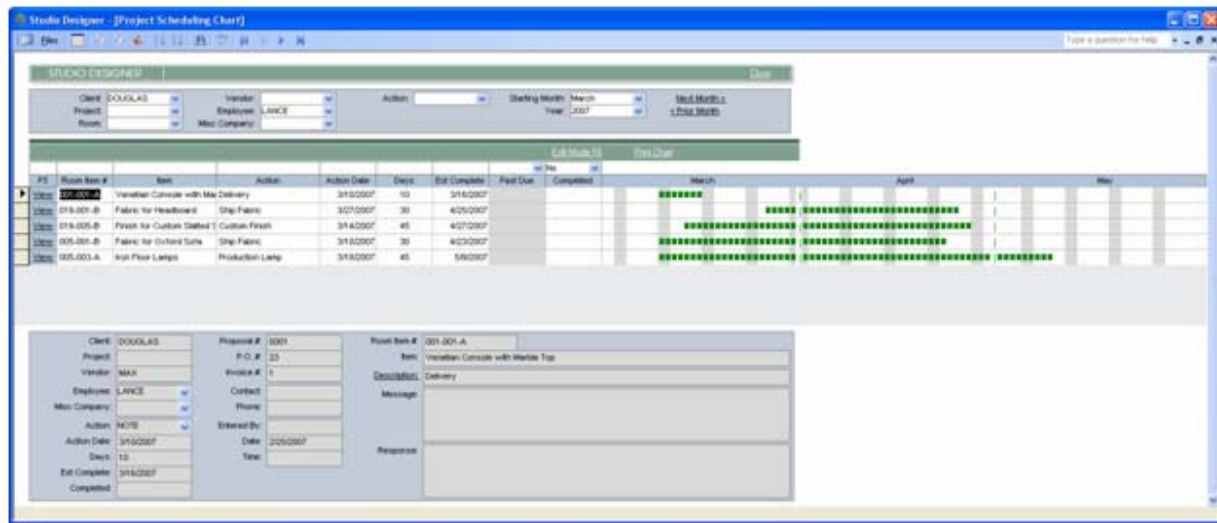
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Project Scheduling

Viewing the Project Schedule Chart

View the project schedule timeline chart

- Open the **Project Schedule**
- Select **Chart Mode**
- The project schedule will display a timeline chart



You can toggle back to edit the project schedule by selecting Edit Mode.

Project Scheduling

Printing the Project Schedule Chart

Print the project schedule timeline chart

- Open the **Project Schedule**
- Select **Print Chart**
- You can view, print or email the project schedule timeline chart

