



'Workplan Distributor' User Guidance Manual

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adept management ltd

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CHAPTER 1: INTRODUCTION

1.1 Welcome to the ADePT 'Workplan Distributor'

The ADePT 'Workplan Distributor' is an add-on to the ADePT Design Manager tool. It allows Workplans existing in ADePT Design Manager to be exported to MS Excel, with predefined formatting and structure. It then allows changes in Excel files to be imported to ADePT Design Manager.

This approach is an alternative to publishing Workplans to the www.adeptdesignmanager.com web site for review by a project team: feedback from project teams shows that in some cases reviewing an Excel workbook is preferable because of its speed of access and familiarity.

1.2 About this user manual

This user manual describes how each item of functionality in ADePT Design Manager is accessed and executed. Each section covers the reasons for the functionality (why), how it is executed, including any alternative methods (how), and any additional information. The document has been deliberately kept brief (for a user manual), with each section being presented as a series of brief steps supported by screen shots where necessary.

CHAPTER 2: CREATING WORKPLANS

2.1 Set up a Workplan Format

Why?

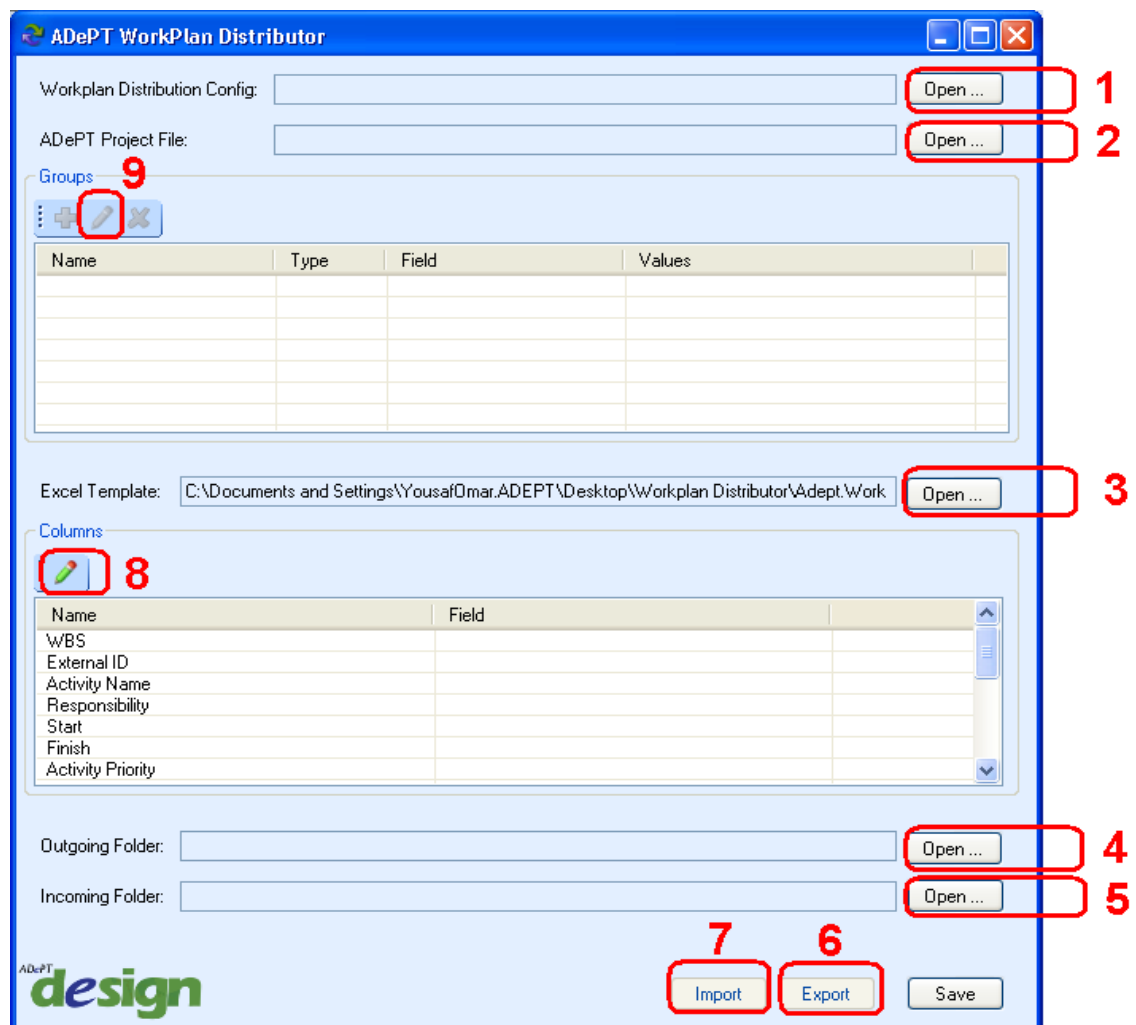
Ensure that Workplans are created in the correct location on your computer, that they appear as required, and that information on the Workplans is structured as required.

How?


1. Set up an Excel template file. A sample template is provided with the Workplan Distributor and it is a good idea to use this as a starting point. Add, remove or rename column headings, add logos, and amend colours, but do not change the layout of the first set of rows in the template which contain the project name and dates (the colours can be changed).

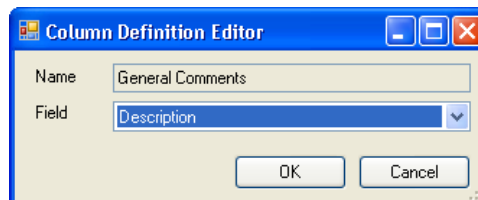
Project:		Project Name										Add your logo				
Workplan start date:		01 Jan 2009														
Workplan period end date:		15 Jan 2009														
Lookahead period end date:		29 Jan 2009														
WBS	External ID	Activity Name	Responsibility	Start	Finish	Activity Priority	Current % Complete	New % Complete	Change in %	Expected Completion Date	Critical ?	Reasons for Failure / Control	Date Controlled Expected to be Resolved	Explanation	Planned Action	General Comments

2. Open the Workplan distributor; it should be appear in a window as shown in the following image.

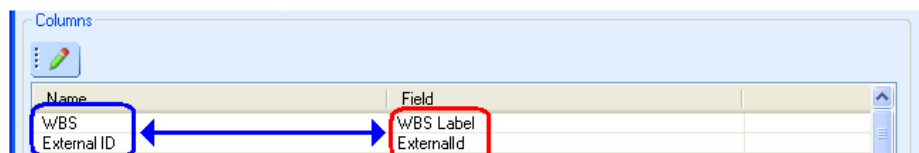



3. Initially, point the application to an existing ADePT file at 2
4. Select the Excel template at 3.

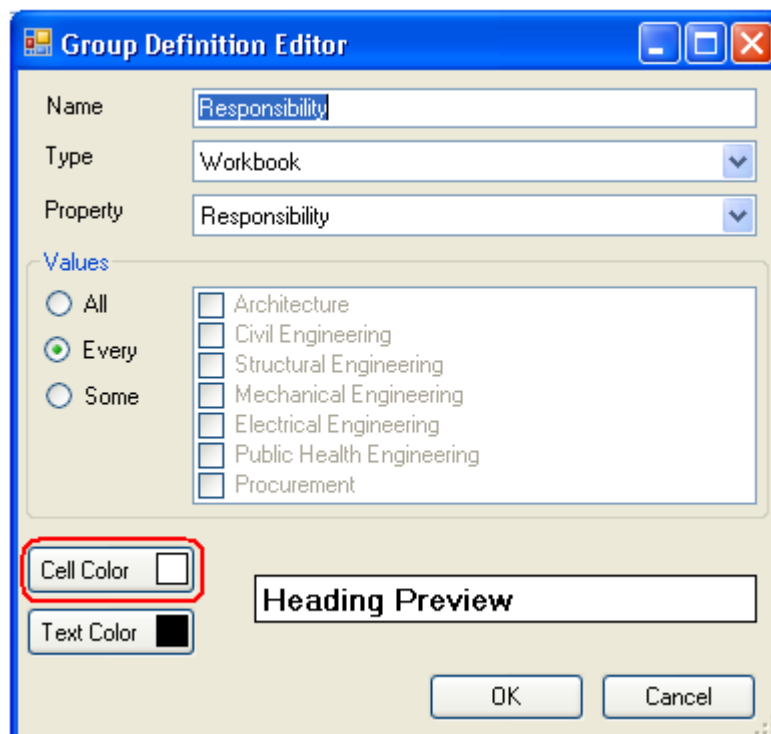
- Identify the location of the desired Outgoing Folder for your Workplans at 4 and similarly identify the location of an Incoming Folder at 5. These folders are where exported Workplans will be placed and prior to distribution to a project team, and where returned / completed Workplans must be placed prior to importing changes into ADePT Design Manager.
- In order for the correct data to appear in the columns of your Workplans the columns must be 'mapped' to data fields in ADePT Design Manager, they must be mapped at 8. This can be done by selecting a column heading from the Name list and then selecting the Edit [] symbol. You will be presented with a dialogue box:



Select the corresponding data field from the drop down list. The image below shows what you expect to see when mapping column headings to data fields. Note that some columns in your template may not have corresponding data fields in ADePT Design Manager (such as 'change in %'). The field which corresponds to these columns should be left blank.

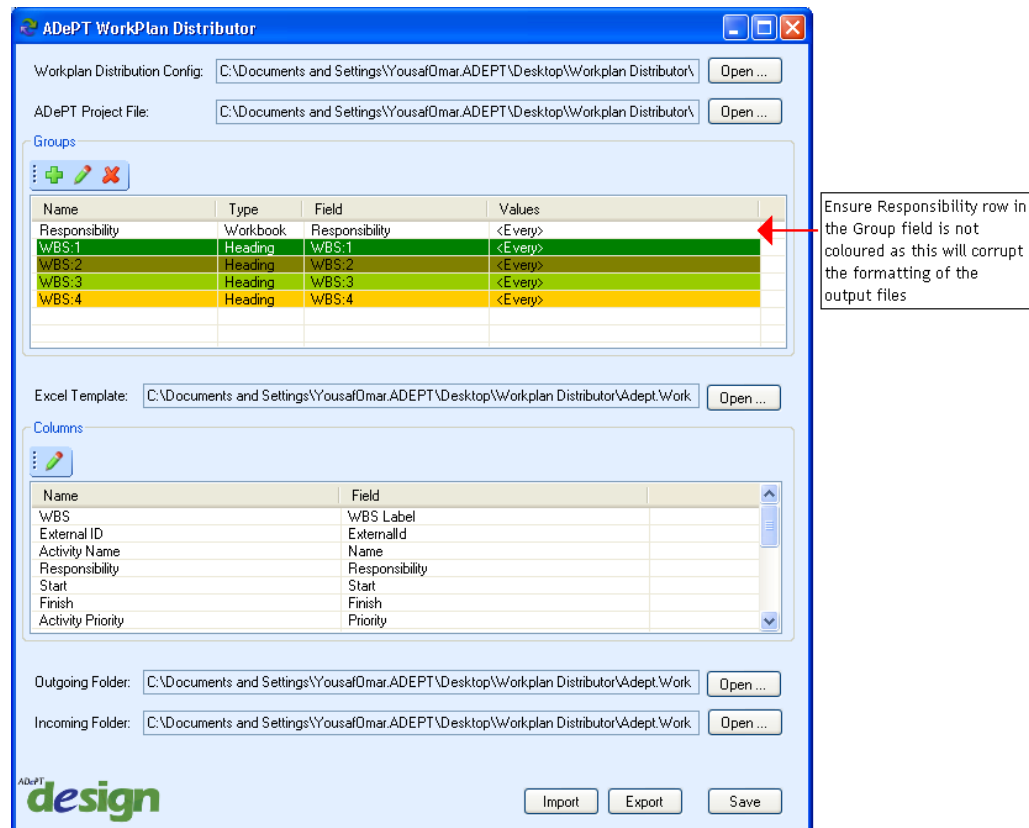


- To group activities on a Workplan by code types and values (such as WBS) you are required to set up groups at 9. Select the Add symbol [] and you will be presented with the Group Definition Editor dialogue:



To group activities by responsibility (or any other code type) into separate Excel workbooks, select Responsibility as the Property and Workbook as the Type in the first grouping. All responsibilities can be grouped in the same workbook by selecting All under the Values option, or a selection can be grouped into a single workbook by selecting Some, however it is recommended that for all grouping the option Every is selected so that every code value is represented in its own workbook.

Add further groupings as required - normally all levels of the WBS starting with level 1, then 2, and so on - but ensure that Heading is selected as the Type on all groupings except the first (which can be Heading or Workbook). Select an appropriate text and cell colour for each grouping, however ensure that where the first grouping is of the Type 'Workbook' that no colour formatting is applied, since colours can only be applied to Headings and not to Workbooks.



8. Once all the above steps have been carried out, the settings can be saved. Select Save and then locate and name a *Config File*. From this point onwards, you can point the application to this file at 1 to retrieve all settings.

2.2 Creating Workplans for Distribution

Why?

Generate Workplans so that they can be distributed to a project team.

How?

1. Set up a Workplan format (section 2.1) or open an existing Config File with a pre-defined format.
2. Ensure that in ADEPT Design Manager, your project file has a valid Workplan, and that the file is saved.
3. Select Export. This will create Excel files in the Outgoing Folder. Each file will be automatically named to contain the date at the end of the Workplan Focus period and the grouping code value [DD_Month_Year_CodeValue]. Note that you should not attempt to open any exported file until all exported files have been generated.
4. These exported files can now be distributed to the project team, for example by e-mail.

CHAPTER 3: UPDATING A WORKPLAN IN ADEPT DESIGN MANAGER

3.1 Importing Changes from Completed Workplans

Why?

Ensure that progress, constraints, and so on, captured in exported Workplans is imported to ADePT Design Manager before starting a next Workplan cycle or updating a schedule.

How?

1. Open an existing Config File with a pre-defined format.
2. Ensure that in ADePT Design Manager, your project file has a valid Workplan, and that the file is saved.
3. Gather updated Excel Workplans from the project team and place them in the Incoming Folder. Note that any files from previous Workplans in that folder will need to be removed.

Start	Finish	Activity Priority	Current % Complete	New % Complete	Change in %	Expected Completion Date	Reason for Failure / Constraint
15 Apr 2009	21 Apr 2009	A - Due to be completed	25	75	50		Resource not available
22 Apr 2009	28 Apr 2009	A - Due to be completed	0				

Here an update has been made for task 1.1.1.1

4. Select Import. You will be shown how many changes need to be applied to the file in ADePT Design Manager, and will be given the opportunity to reject any changes by deselecting them from a tick list.
5. Review the Workplan in ADePT Design Manager and you will see the changes applied to the Workplan.

Task 1.1.1.1 has been updated to 75% which was originally made in the Excel file in the Output folder

WBS	External Id	Name	%	Duration
▶ 1.1.1.1.1		Establish required rooms, preferred room sizes an...	75	5
▶ 1.1.1.1.2		Establish preferred layout of spaces	0	5
▶ 1.1.1.1.3		Estimate space allocation of major plant rooms	0	5
▶ 1.1.1.1.4		Establish approximate building footprint & locatio...	0	5
▶ 1.1.1.1.5		Produce Concept building layout GA drawings	0	5
▶ 1.1.1.1.6		Issue concept GA layout drawings	0	0
▶ 1.1.1.2.01		Draw up a strategy for fire safety	0	5
▶ 1.1.1.2.02		Draw up a strategy for acoustic performance	0	5
▶ 1.1.1.2.03		Agree typical wall types & thickness dimensions	0	5
▶ 1.1.1.2.04		Agree space allocation of major plant spaces	0	5
▶ 1.1.1.2.05		Fix overall building footprint dimensions	0	5
▶ 1.1.1.2.06		Fix building grid line positions	0	5
▶ 1.1.1.2.07		Produce basement layout GA drawings to reflect...	0	5
▶ 1.1.1.2.08		Produce ground floor layout GA drawings to refle...	0	5
▶ 1.1.1.2.09		Produce basement layout GA drawings to reflect initial Design Development	0	5
▶ 1.1.1.2.10		Issue GA layout drawings reflecting initial Design...	0	0
▶ 1.1.1.3.1		Finalise room dimensions & layout	0	5
▶ 1.1.1.3.2		Finalise wall types & thickness dimensions	0	5
▶ 1.1.1.3.3		Agree door & glazed panel positions	0	5
▶ 1.1.1.3.4		Finalise room dimensions & layout	0	5