<u>Phase Alignment (Adding Missing Tasks)</u>

10-27-2017

The process outlined below helps a user add a task to an exsiting schedule without having to Refresh or Purge the schedule. The following types of tasks can be added if the specific criteria is selected.

- **Base Tasks (not tied to an option)** – Can be add as long as the task is in the template calendar
- **Option Task (Community)** – The option tied to the task needs to be selected on the schedule you are trying to add the task to
- **Option Task (UCS)** – The option tied to the task needs to be in UCS. This means you will have to wait 1 day due to current nightly feed proceedures

Schedules created from delete templates can not have tasks added
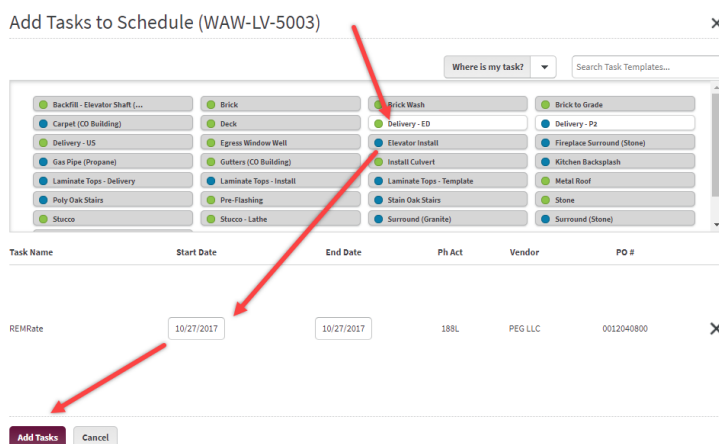
<u>Steps to Add a Task</u>

- Click the **" i "** button located in the upper left hand corners
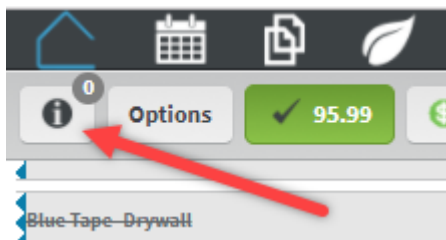
- Click the **"Add Tasks"** button in the lower right hand corner of the lightbox

- Select the task you want to add to your schedule (you can only add tasks that are NOT grayed out), then click **"Add Tasks"**

- Click **"Reload Schedule"**

Detail Description of Task Add Page

1. DCLU of the schedule you plan on adding the task
2. Link that takes you to the template that created the schedule. If the template is deleted it will tell you.
3. Search box – Searches possible tasks in the field below
4. Gray Task – Means that it is in your template calendar but the option that triggers that task is not selected
   a. Clicking on a task will show you all possible options that need to be triggered to make the task able to be added to the schedule
   b. Community Option can be selected on the lot
   c. UCS options need to be added in UCS (you can add the task the following day)
5. White Task – Means that it is able to be added to the schedule
6. Name of the task being added
7. Start Date/End Date – Defaults to the current date, if the dates are different then it represents a duration of the delta
8. Ph Act – Phase activity being assigned to the task
9. If no phase activity is listed, then the division phase activity page needs to be updated (contact your PM/CCM)
10. To remove a task from being added to the schedule (this does not remove existing tasks on the schedule)
11. Clicking "Add Tasks" will add the tasks above to the schedule. It takes about 3-5 seconds per task being added. Please do not leave the page.

Template Page when trying to Add a Task

1. Tasks in the hopper will never show up in the Add Task list (if a tasks is missing please contact your Area Lead)
2. Clicking **"Done"** will take the user back to the schedule (calendar view)
3. Base tasks will always show up in the possible add task list
4. Option driven tasks need to have the option selected in the schedule for the task to show up in the add task list
   a. Community – Needs to be selected under the Manual Options tab
   b. UCS – Needs to be selected in UCS (Atlas) Requires a night of automation to update the schedule.