

Getting Started Guide

GraphicSchedule Excel Add In v1.16

About the GraphicSchedule Excel Add In

We originally built GraphicSchedule because we needed a better way to communicate complex projects, and we didn't want to fuss with tedious hand-drawn graphics.

The core values for this add in are:

1. Build something that our users LOVE.
2. Make it easy for “non-schedulers” to use our product.
3. Preserve the look and feel and flexibility of the Excel environment. So you can skip the learning curve and just get started.

GraphicSchedule is a simple yet powerful tool that has helped many teams communicate their plan for success. I hope it makes your life a little bit easier, and helps your team deliver a winning project.

Thanks for choosing GraphicSchedule!



James Wonneberg
President, Grit City Labs

Installation

GraphicSchedule is an Excel Add In. Here's how to install it:

Download the Setup file to your PC.

Run Setup and follow the prompts.

Open Excel and locate the 'GRAPHICSCHEDULE' ribbon.

System Requirements:

- ✓ PC with Windows 10
- ✓ .NET Framework version 4.8 (included)
- ✓ Excel 2013, Excel 2016*, or Office 365
- ✓ Windows language settings set to English (United States)



Installation takes less than 2 minutes

**Some standalone versions of Excel purchased via the Windows Store may not be compatible.*

Getting Started

Open Excel

GraphicSchedule is an Excel Add In.

GRAPHICSCHEDULE Ribbon

Bringing you powerful new communication tools in a familiar environment.

Create New Sheet

Click here to get started.

Get Help

Send us an email!

Choose a Layout

Click on the thumbnails to explore these starter layouts.

You'll be able to adjust everything as you go, so these layouts are just a starting point.

View Demo

Open a fully-functional example project for each layout to see how GraphicSchedule works.

New Sheet

Create a new blank template and dive right in.

The screenshot shows the Microsoft Excel interface with the GRAPHICSCHEDULE ribbon active. The ribbon includes options for 'Timescale', 'Vertical (Location) Axis', 'Data Date Line', 'Power-Ups', and 'GraphicSchedule'. A 'Choose a Layout' dialog box is open, displaying four layout thumbnails. The selected layout is a 'Linear Schedule (Time from Top to Bottom)' showing a project timeline from 2017 to 2019. The timeline includes activities like 'PREP SITE', 'CONSTRUCT SOUTH SHAFT', 'ASSEMBLE TBM', 'EXCAVATE TUNNEL', 'CONSTRUCT NORTH SHAFT', 'RETRIEVE TBM', 'PUNCH LIST', and 'SUBSTANTIAL COMPLETION'. The dialog box also contains a 'View Demo' button, a 'New Sheet' button, and a 'Cancel' button.

Year	Quarter	Activity
2017	Q1	PREP SITE
2017	Q2	CONSTRUCT SOUTH SHAFT
2017	Q3	ASSEMBLE TBM
2017	Q4	CONSTRUCT NORTH SHAFT
2018	Q1	EXCAVATE TUNNEL
2018	Q2	RETRIEVE TBM
2018	Q3	PUNCH LIST
2018	Q4	SUBSTANTIAL COMPLETION
2019	Q1	
2019	Q2	
2019	Q3	
2019	Q4	

Basics

Timescale Controls

Set the date range, interval, precision, and orientation of the timescale on the chart.

Axis Controls

Adjust the range, interval, and format of the location or task axis on the chart.

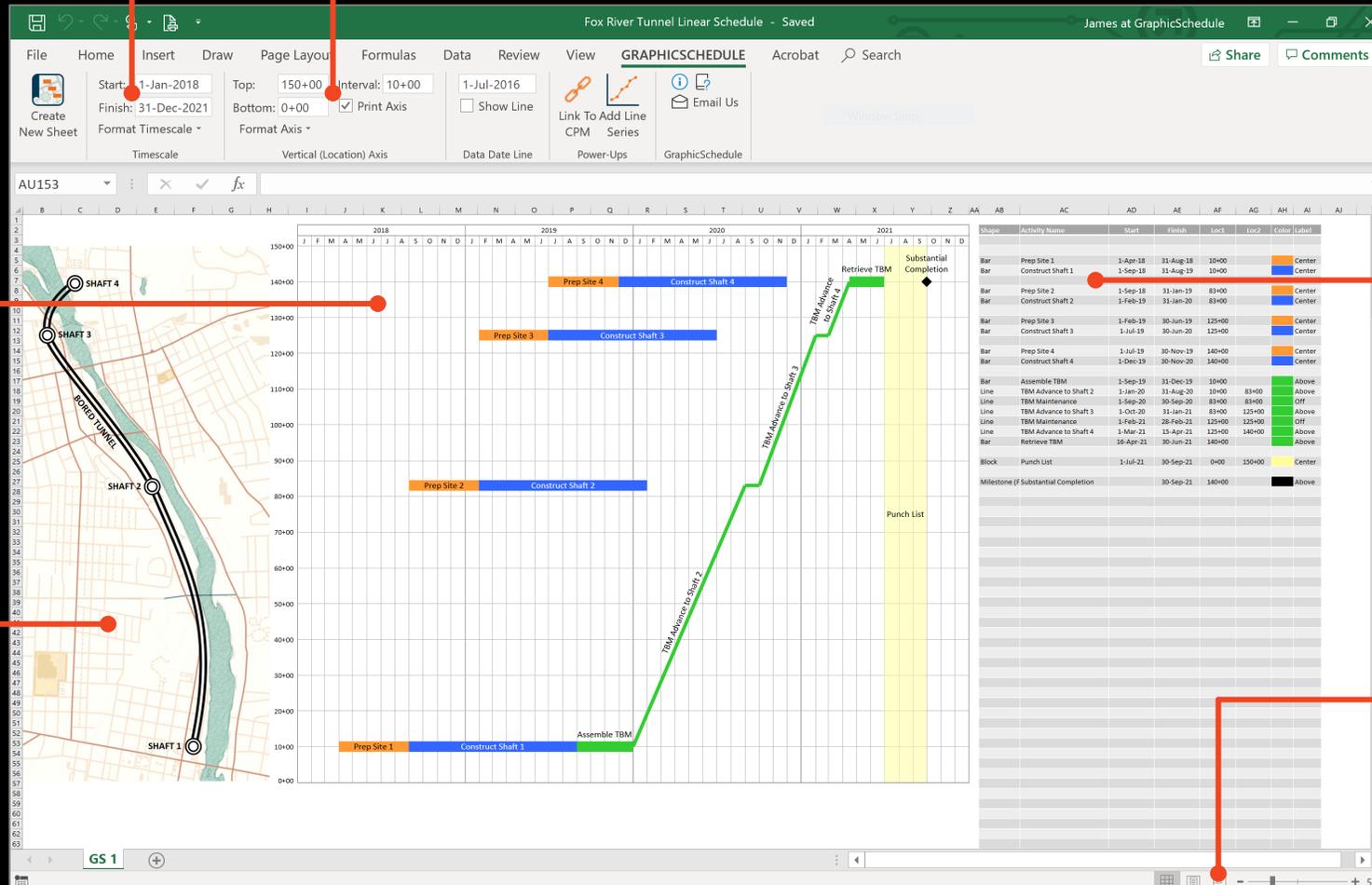
Chart

This chart is created instantly by the add in so you can plot shapes by time and location.

Project Graphic

Insert any image here to illustrate what you're building.

For linear schedules, try to position the graphic so it lines up with the chart location axis.



Data Table

Enter data here to plot new shapes on the chart.

Choose a shape, give it a name, enter dates and locations, pick a color, and watch it appear.

Required entries for each type of shape are highlighted in red.

Get Ready to Print

Switch to 'Page Layout' view to insert your logo in the header and update the title block info.

Switch to 'Page Preview' if you need to adjust the print area.

More Tools

Data Date Line

Add a line that marks the date when the schedule data was last updated.

Link to CPM

Establish links to data from other scheduling applications by Activity ID, for easy updates whenever your plan changes.

Add Line Series

Create an X,Y line series to plot activities or other data that changes frequently over time.

Resize the Chart

Click anywhere in the chart area to activate handles around the perimeter of the chart.

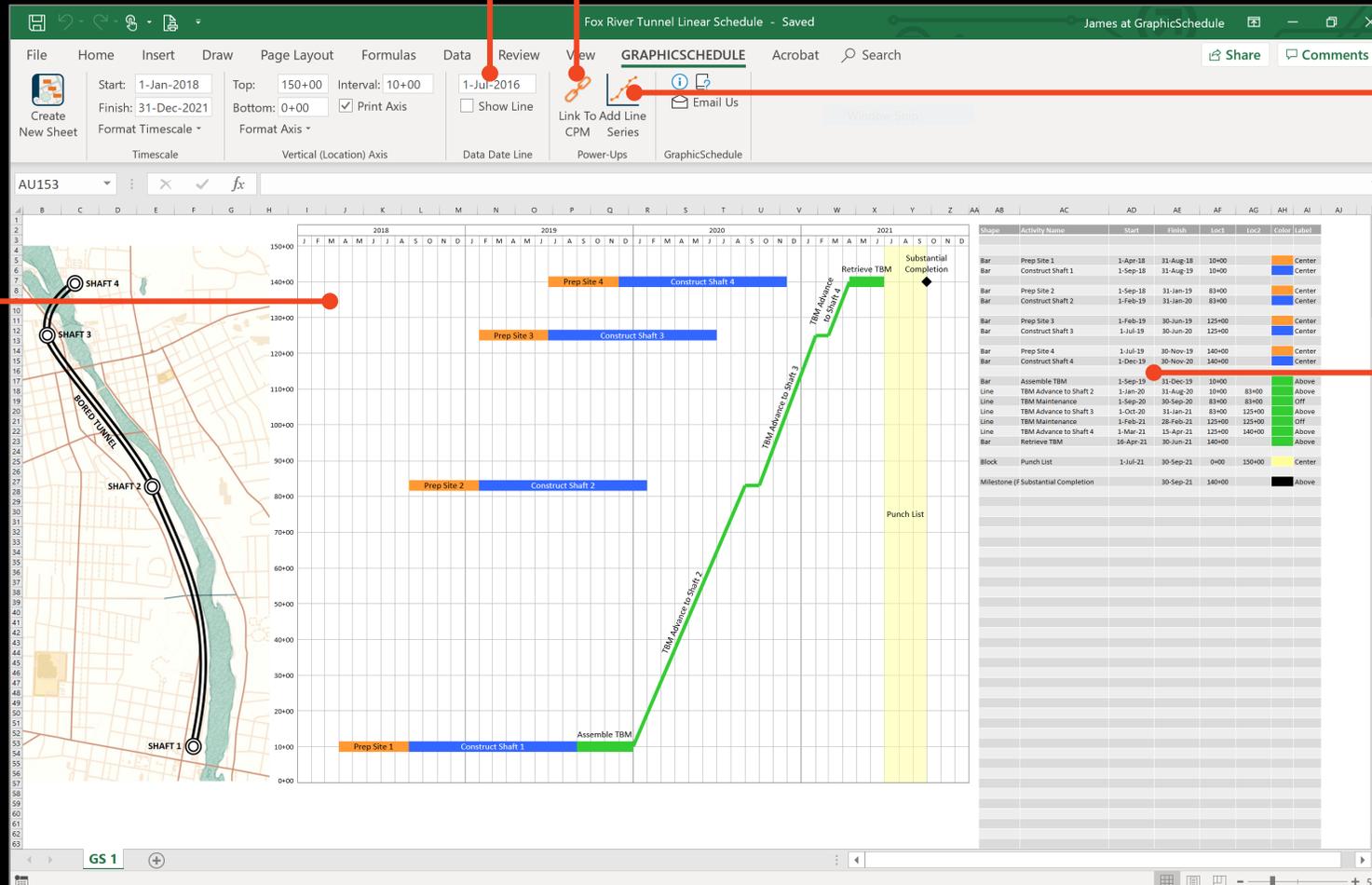
Resize to accommodate a different layout, make room for graphics, print on smaller paper, etc. The chart will redraw automatically.

Use Excel like Excel

GraphicSchedule keeps the power of Excel at your fingertips.

Feel free to copy/paste, fill down, insert/delete rows, drag and drop rows, or create your own formulas right here in the data table.

You can also insert more columns to help with Excel calculations or keep track of other project data.



Custom Formatting

Shape Format

Adjust the fill color, outline color, transparency, and shape size.

Label Format

Adjust the text color, label position, and label size.

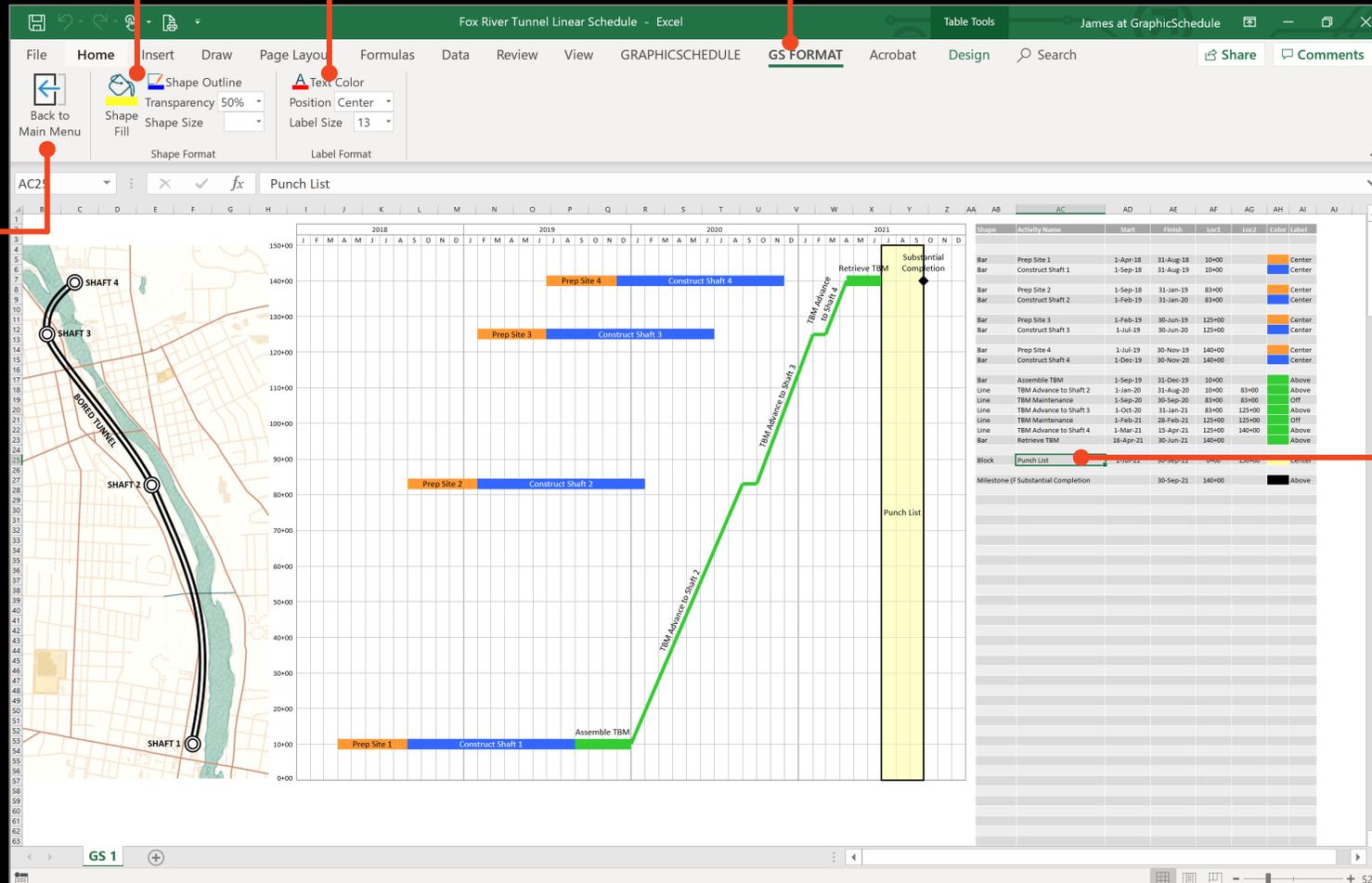
GS FORMAT Ribbon

This ribbon appears when you select a shape in the data table.

Return to Main Menu

Takes you back to the GRAPHICSCHEDULE ribbon.

(or just click in any blank cell)



Select Shapes Here First

Click on the data table entry associated with the shape that you want to format.

Tip: select multiple entries in the data table to format multiple shapes at once.

Bar Chart Example

Summarize any project or program schedule on a single page:

Page Header

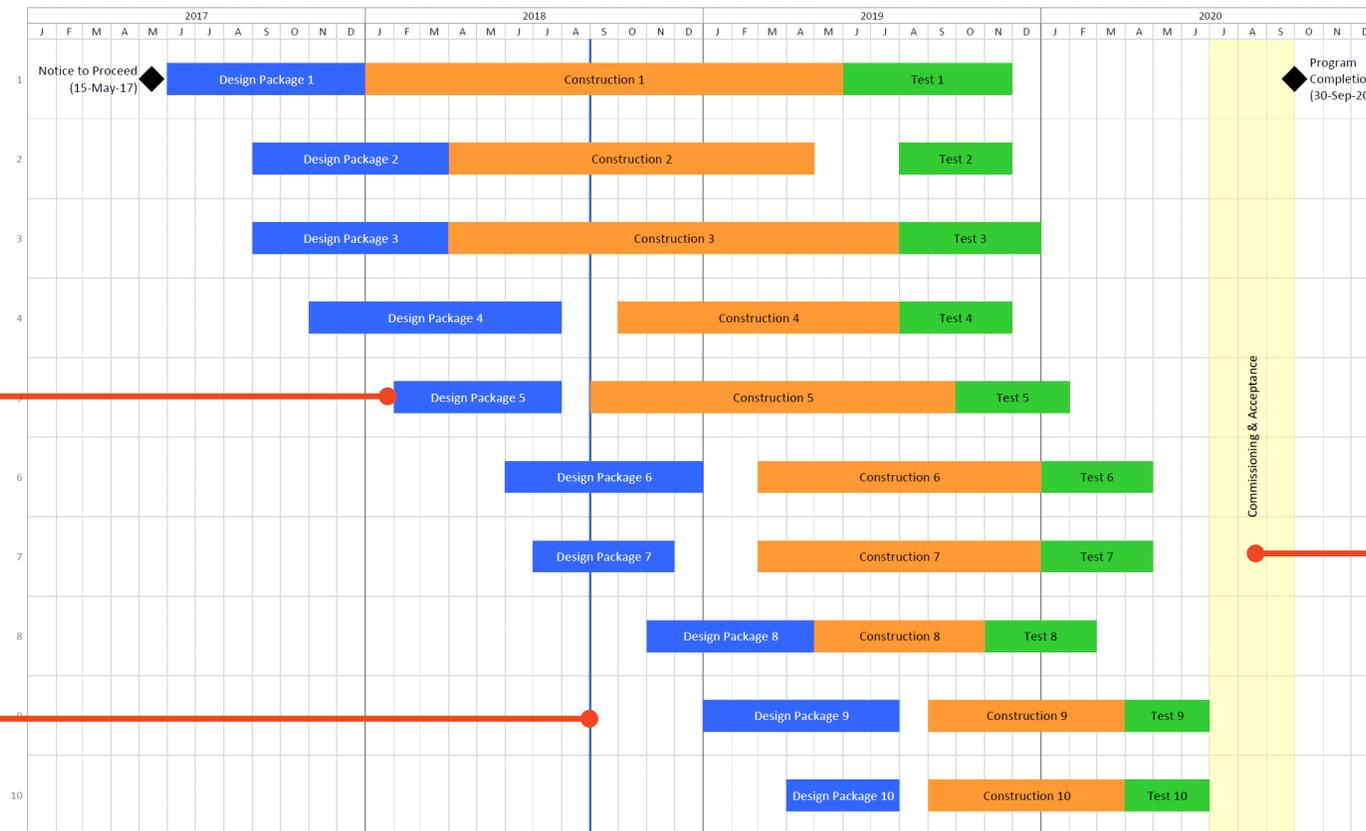
Insert your logo and update the title block information here.



PM3 PARTNERS
A JOINT VENTURE

Program Master Schedule
Fictional Project for Demonstration Purposes

Project Status
Author: 28-Oct-18



Bar Shape

Represents a task or summary activity, plotted by row number. Plotting multiple bars on the same row saves space so you can fit your schedule on one page.

Data Date Line

Marks the date when the schedule data was last updated.

Milestone Shape

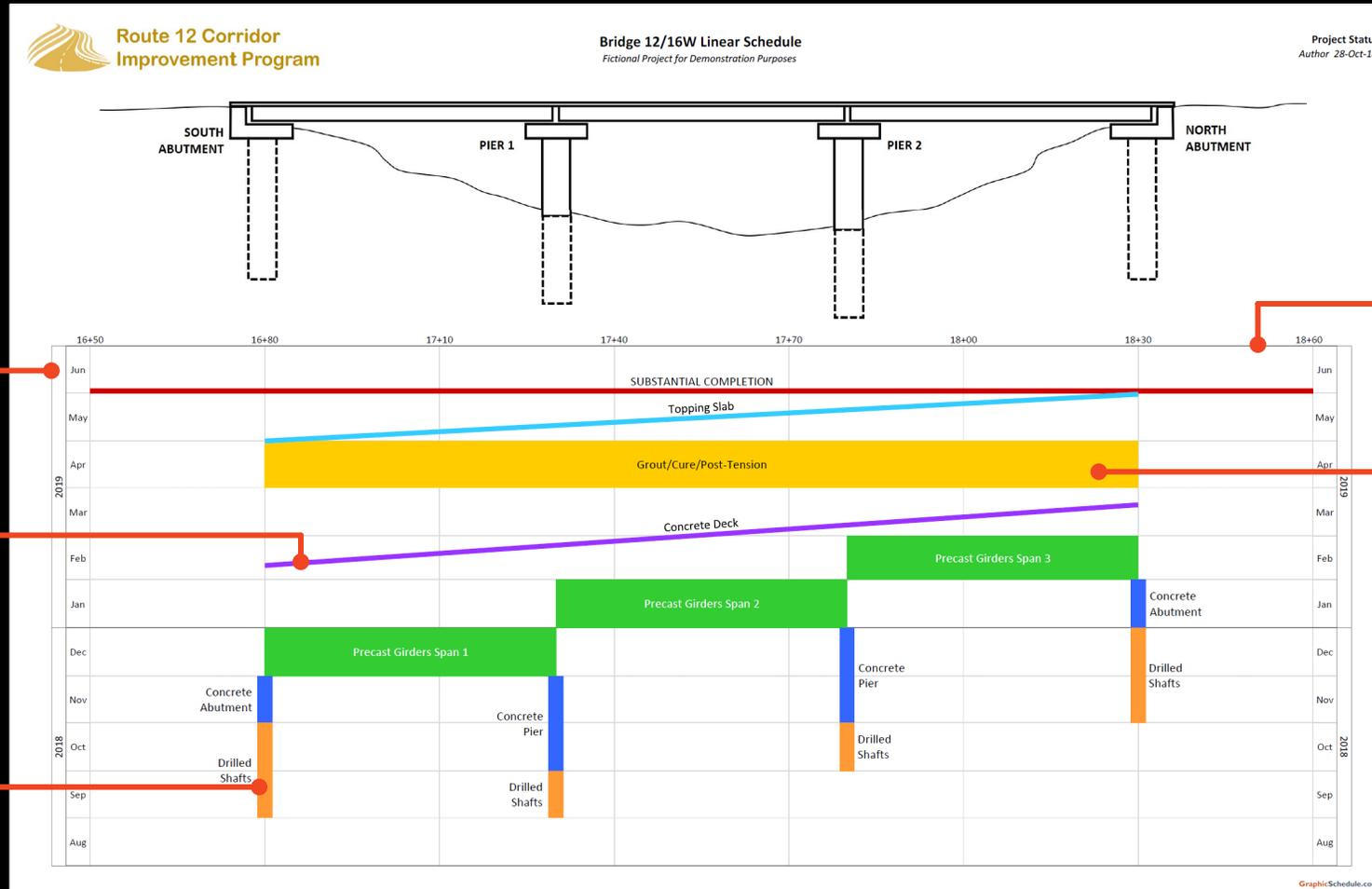
Represents a deadline or key deliverable, plotted by row number.

Block Shape

Represents a project-wide activity, event, or work window related to multiple rows on the schedule.

Linear Schedule Example

Illustrate your scope of work and schedule, plotted by time and location:



Timescale

In this example time is plotted from Bottom to Top. You can also choose to plot time from Top to Bottom or Left to Right and the chart will redraw accordingly.

Line Shape

Represents an activity that moves from Point A to Point B over time.

Bar Shape

Represents an activity that occurs at one location.

Location Axis

Displays stationing or other distance markers along the project alignment. Adjust this axis so it's aligned with the project graphic.

Block Shape

Represents an activity that occupies a larger work area for a given period of time.

To learn more about linear scheduling, check out our free eBook on our website.

Using Link to CPM

Create links to other schedule data by Activity ID for easy updates next month:

1



Click the **Link to CPM** button on the ribbon.

A new sheet named **"CPM"** will appear containing a blank table for importing schedule data.

2

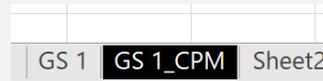


Open the application containing the schedule you want to link to.

Make sure the columns match the order shown on the table in the CPM sheet.

Select all schedule activities (**Ctrl+A**) and copy to the clipboard (**Ctrl+C**).

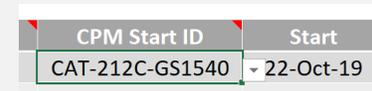
3

A snippet of an Excel spreadsheet showing a table with columns "GS 1", "GS 1_CPM", and "Sheet2".

Paste your schedule data into the table on the **CPM** sheet (**Ctrl+V**).

'A' and * characters are removed from actual and constrained dates so Excel can recognize them as dates.

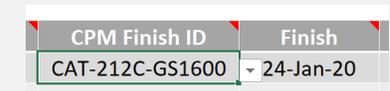
4

A snippet of an Excel spreadsheet showing a table with columns "CPM Start ID" and "Start". The "Start" column has a dropdown menu showing "22-Oct-19".

On the **GS** sheet containing your graphic schedule, locate the **CPM Start ID** column in the data table.

Choose an Activity ID from the dropdown or enter a valid Activity ID manually. The **Start** date will appear and is now linked to your imported data.

5

A snippet of an Excel spreadsheet showing a table with columns "CPM Finish ID" and "Finish". The "Finish" column has a dropdown menu showing "24-Jan-20".

Choose a **CPM Finish ID** to establish a linked **Finish** date.

Note: Link to CPM was designed to help summarize a more-detailed series of activities from a CPM schedule. However, you can link both Start and Finish to the same Activity ID if desired.

6 Whenever your plan changes, simply paste the updated schedule data in the CPM table. Your linked graphic schedule will instantly redraw to reflect the new dates.

GraphicSchedule works best if you assume that the Mayor will read your schedule.

She'll want to know *"What are you building?"* and *"When will it be done?"* but she won't have time to review all the details of the project or figure out what all those abbreviations mean.

Try to communicate your plan as simply and clearly as possible:

- *What are our most-important milestones?*
- *What major features of work will we complete to get there?*

This information will help your team see the big picture so they can plan for success. It will also help your boss explain the project to executives. Which means your 1-page schedule might just end up in the Mayor's office after all.

How to Get Help

Visit our website for videos, examples, and other resources. If you need more help, email is the best way to reach me. I will respond within 24 hours.



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How to Buy

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Create something your entire team will love!

About Grit City Labs:

I'm James Wonneberg, President of Grit City Labs. I'm passionate about providing simple tools and methods to help you deliver better projects.

If you're the type of person that wants to roll up your sleeves and create a 1-page schedule that your boss and team members will love, I want to help you.

Visit our website: www.gritcity.co

Get in touch: james@gritcity.co