Getting Started Guide

GraphicSchedule Excel Add In v1.16

GritCity Labs

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

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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)
- ✓ .NET 9 runtime (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. 32-bit and ARM64 versions of Excel are also not compatible.

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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.

Choose a Layout
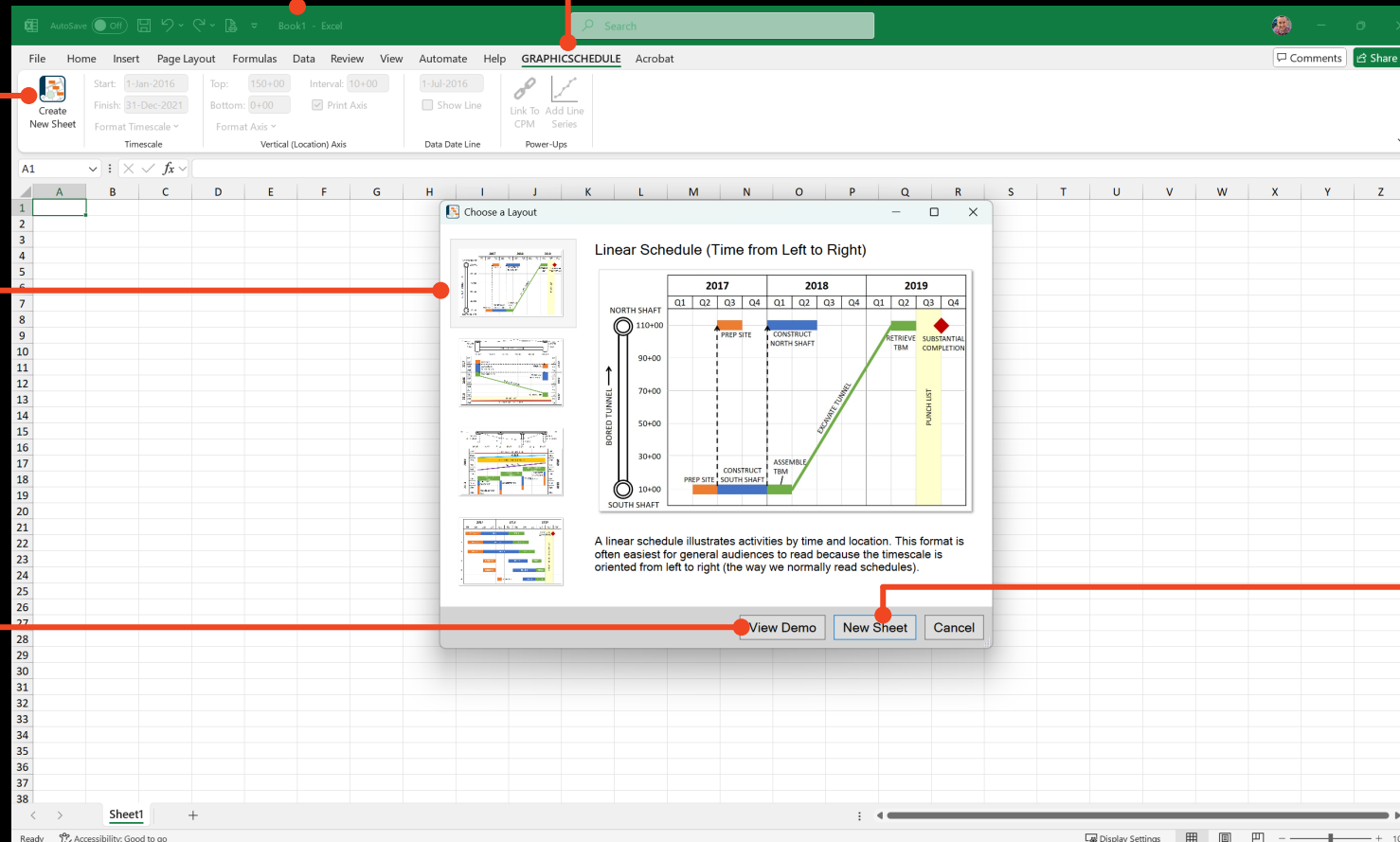Click on the thumbnails to explore these starter layouts.

You'll be able to adjust everything as you go. 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.

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Basics

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

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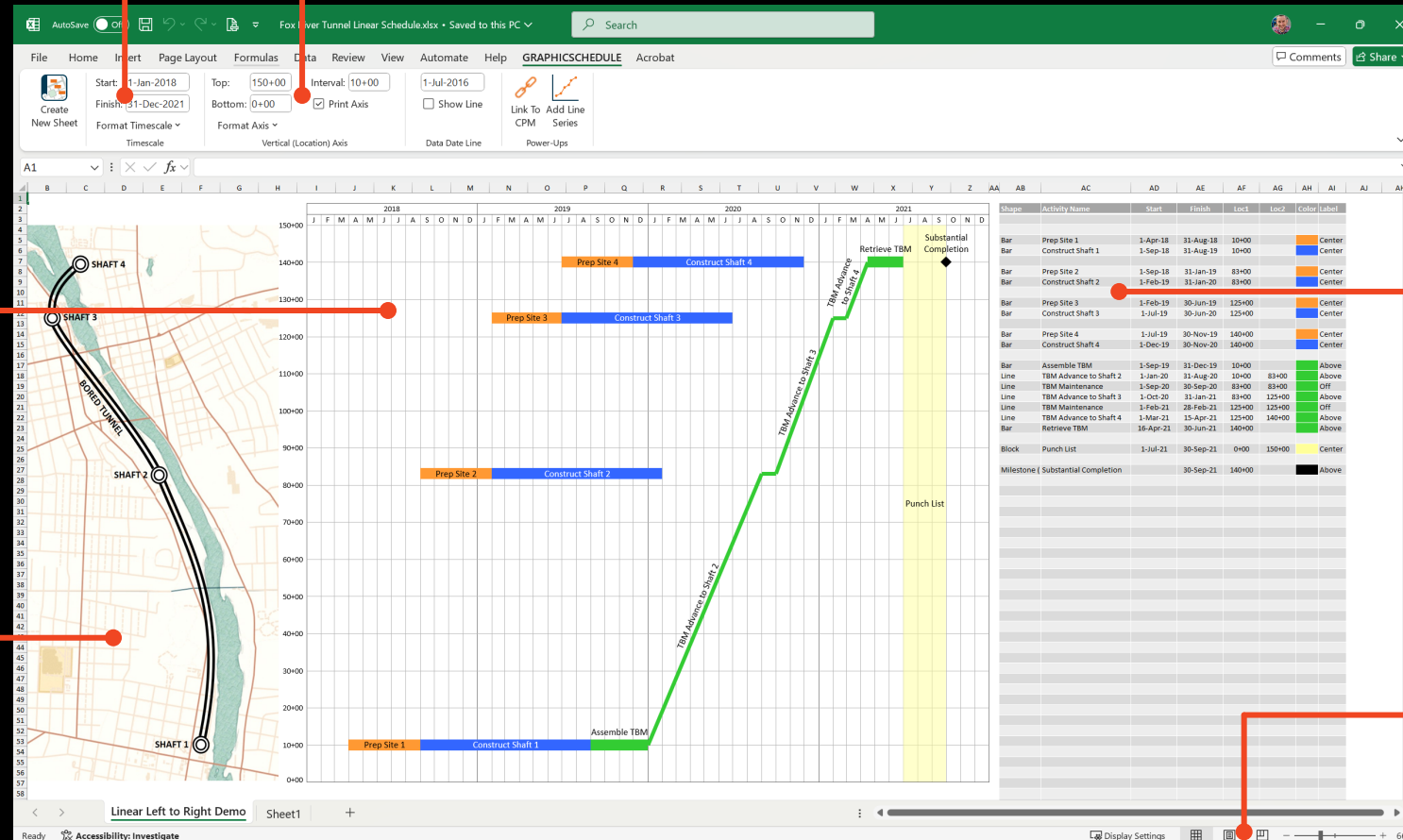Adjust the range, interval, and format of the location or task axis on the chart.

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.

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.

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 Break Preview' if you need to adjust the print area.

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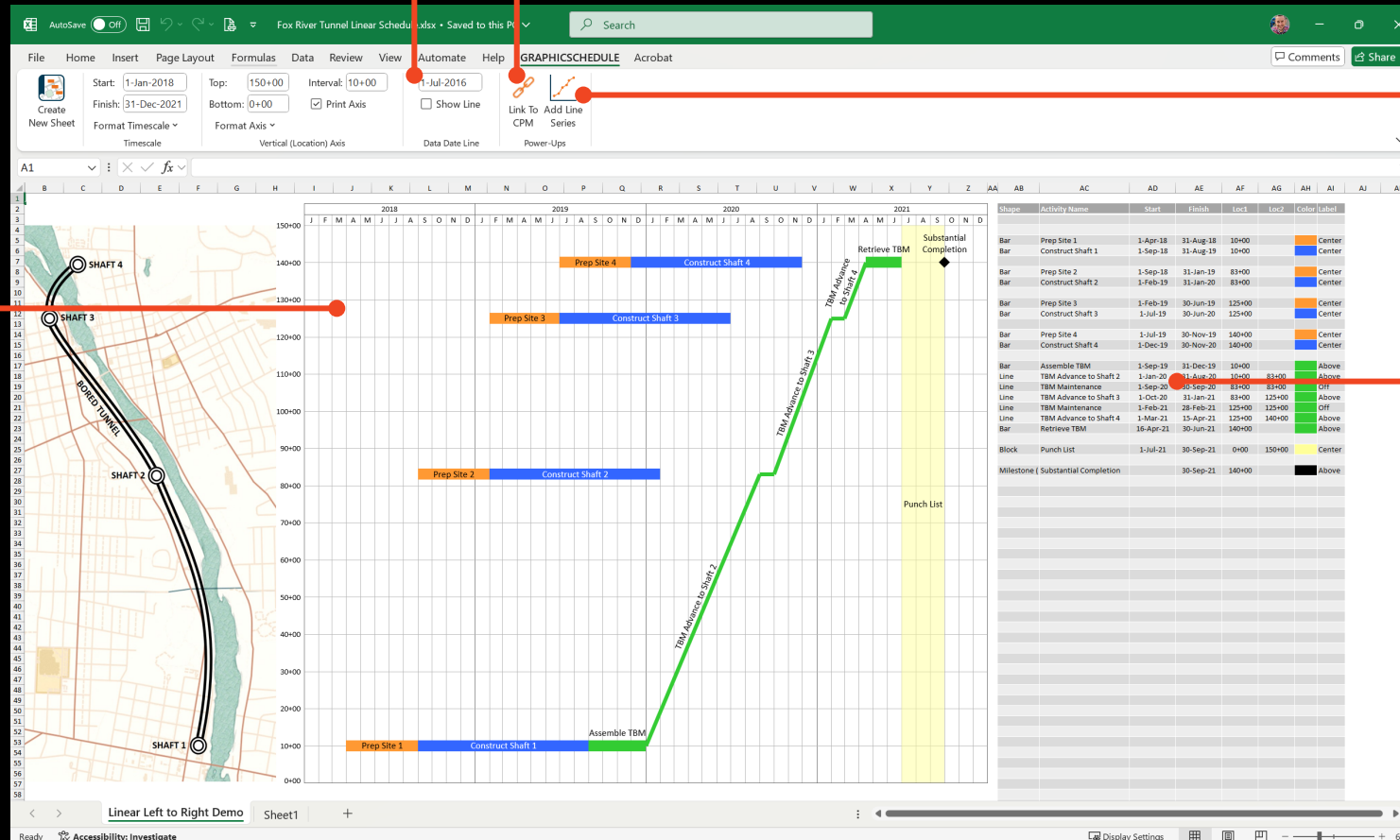Click anywhere in the chart area to activate handles around the perimeter of the chart.

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.

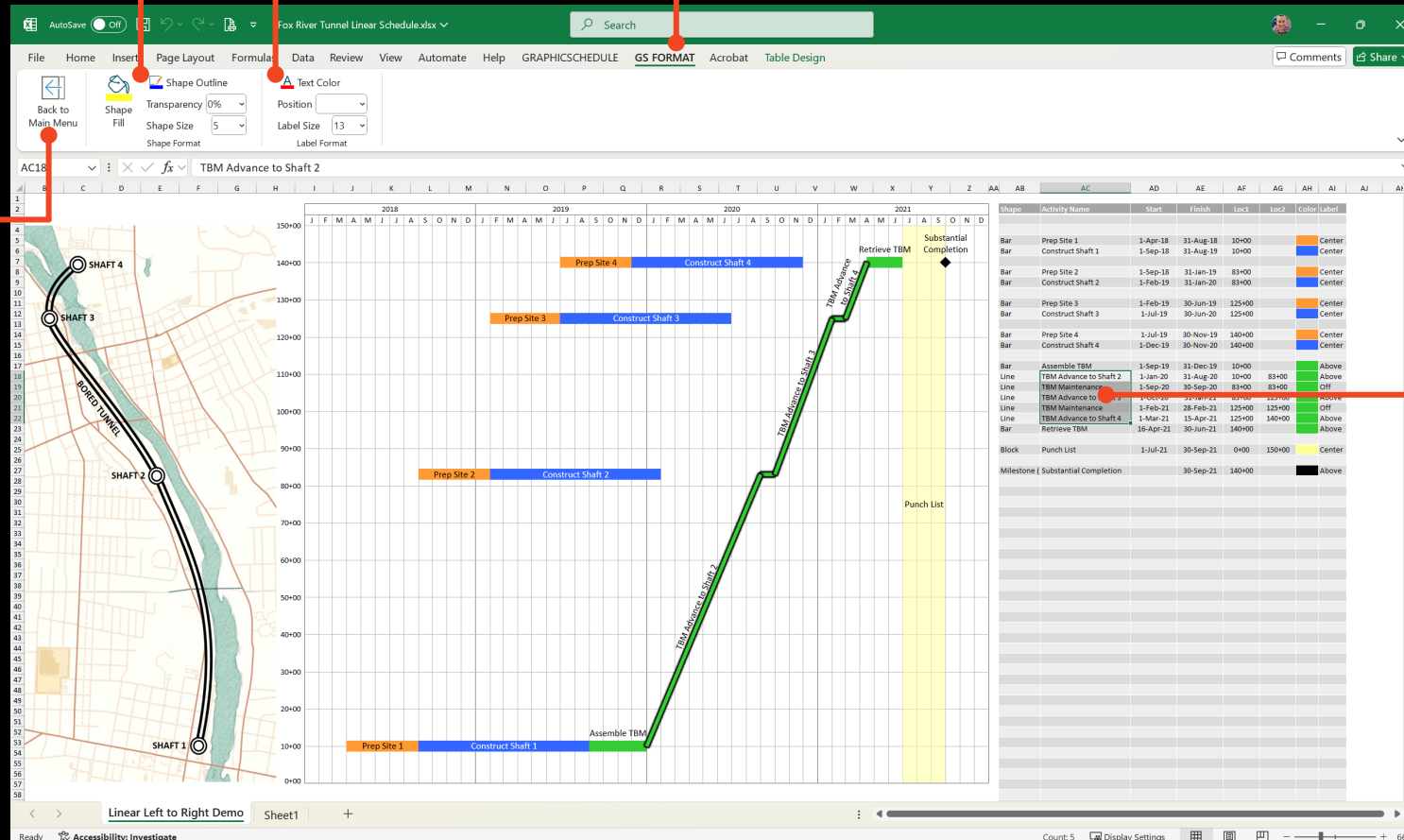**Label Format**
Adjust the text color, label position, and label size.

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.

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Bar Chart Example

Summarize any project or program schedule on a single page:
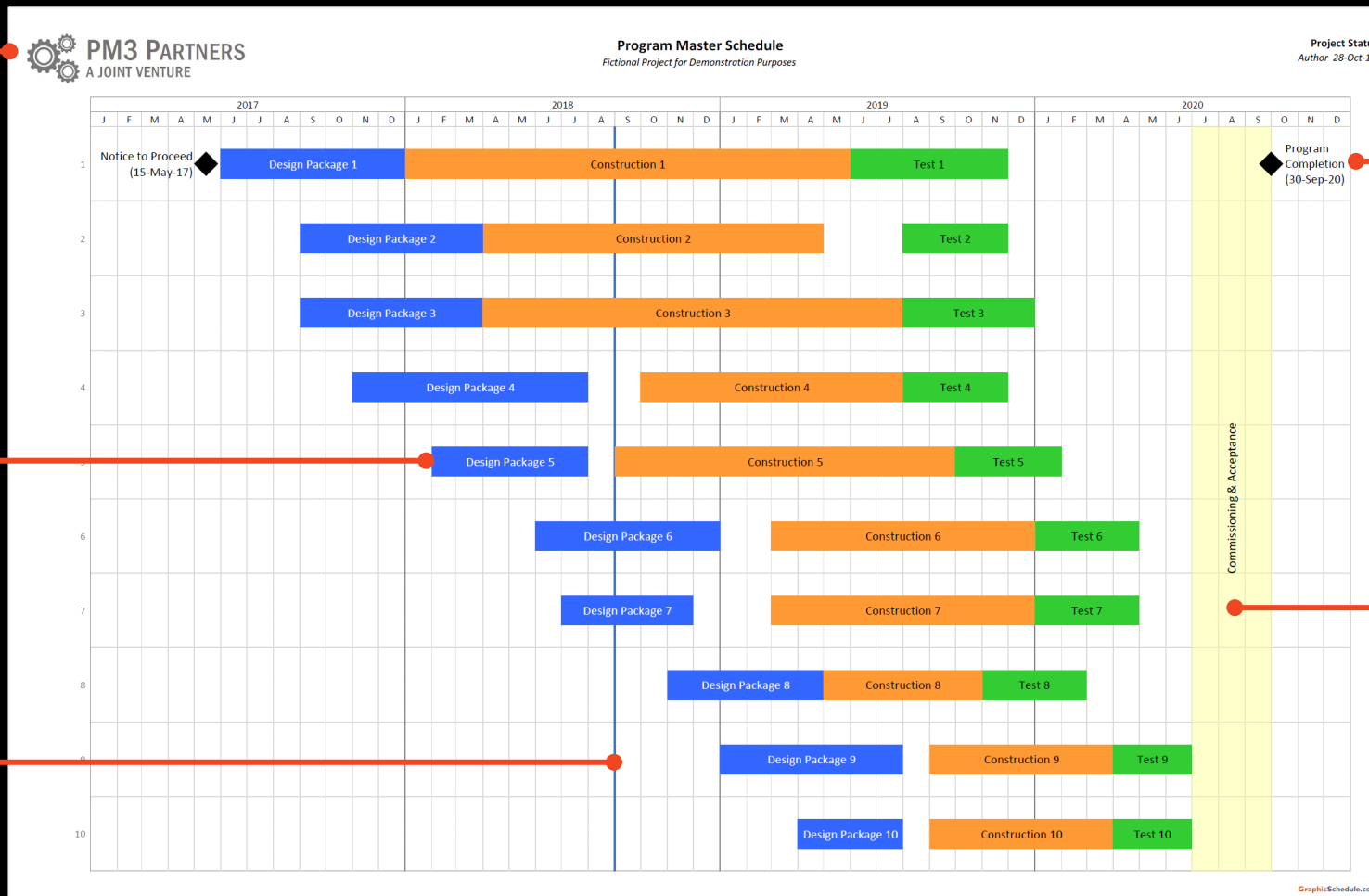
Page Header
Insert your logo and update the title block information here.

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.

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Linear Schedule Example

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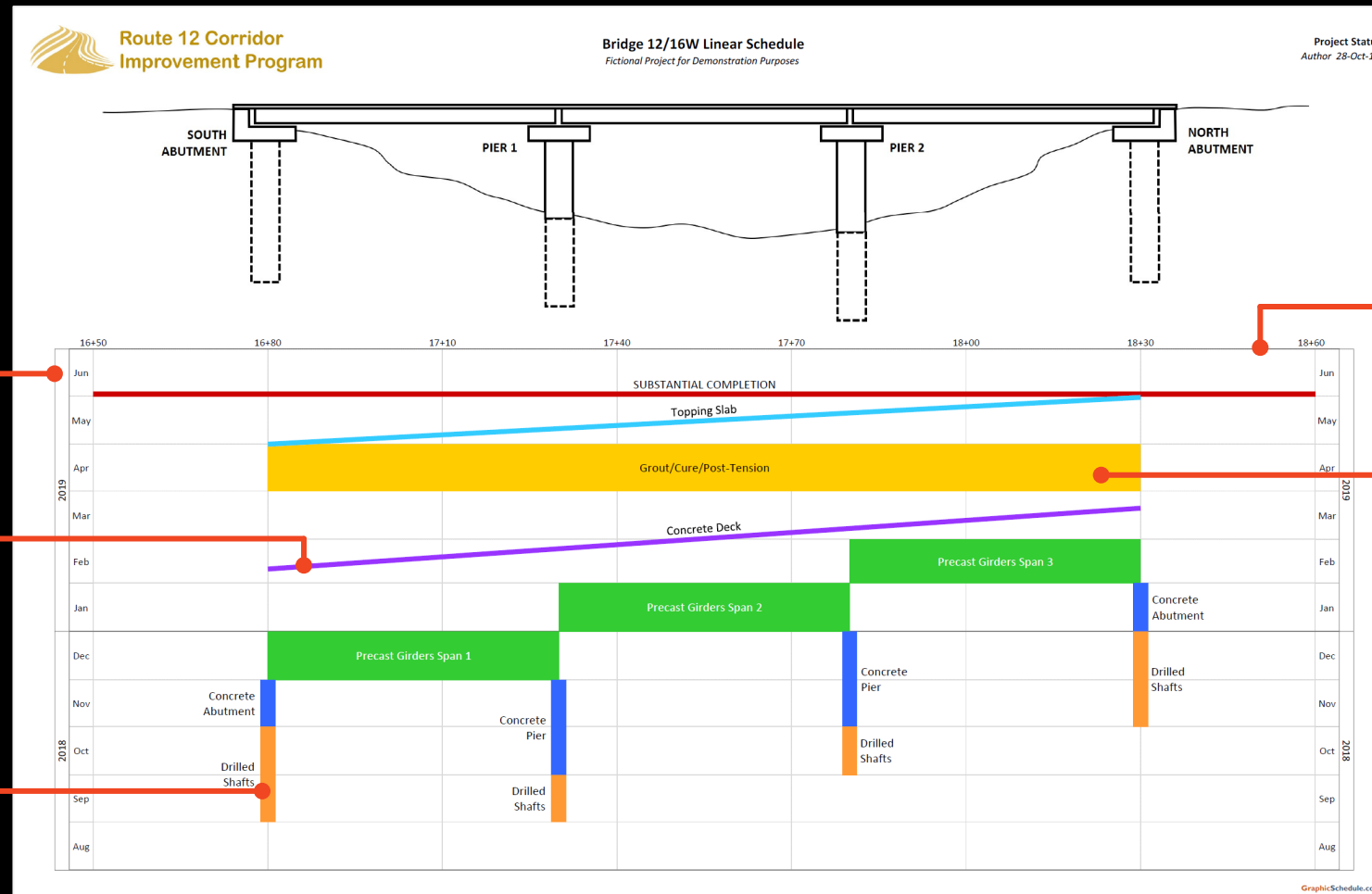

Timescale
In this example time is plotted from Bottom to Top. You can also choose to plot time from Top to Bottom or Left to Right and the chart will redraw accordingly.

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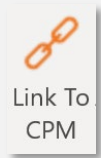
Block Shape
Represents an activity that occupies a larger work area for a given period of time.

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

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Using Link to CPM

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

1

Link To. CPM

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

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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

| GS 1 | GS 1_CPM | 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

CPM Start ID	Start
CAT-212C-GS1540	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

CPM Finish ID	Finish
CAT-212C-GS1600	24-Jan-20

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

Note: Link to CPM was designed to help <u>summarize</u> 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.

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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.

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Backstage View

Manage your license key, see what version is installed, and more.

Helpful Links
View this guide, send James an email, or visit the website.

Software Version
Include this version number with any support requests.

Enter Your License Key
Click 'Activate' and enter your license key in the pop-up window.

After activation, your expiry date will be displayed here.

How to Get Here
Click File > GraphicSchedule to access the backstage view.

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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.

James Wonneberg

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How to Buy

Free trials work for 30 days, then a license key is required. Visit our website to purchase a subscription!

www.gritcity.co

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Create something your entire team will love!

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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

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