

## How to:

### Use the Construction Module's Planner

ESM's Construction module provides a Planner to allow you to organise and monitor multiple construction projects. The planner is similar in layout to Microsoft Project, but somewhat more basic in functionality and consequently simple in operation.

The planner can be opened from the ESM Menu, by going to Construction>>Project Planning.

#### 1. Overview of ESM's Construction Module Planner window

**Date Navigation:** Use 'Week Magnifier' to navigate by week

Use Sliders to navigate by Date (horizontal) and Project (vertical)

**Upper Window:** Business Overview - All Contracts.

**Lower Window:** Select Specific Contract and related Milestones

Project Activities & Dates

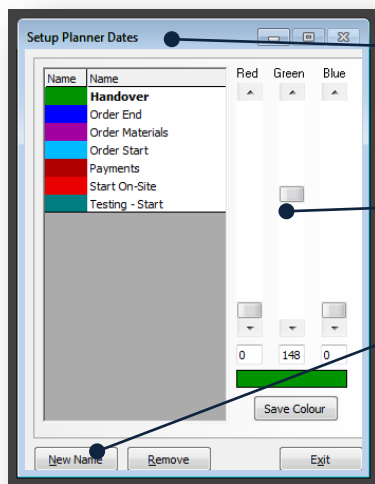
Date	Original %	Current %	Ret. %	Retention To This Point	B. Disc %	Builders Disc To This Point	Already Paid	Total Applied For	Sent	Received	Comments
30/09/14	50.00	50.00	500.00	£3,125.00	0.00	£0.00	£0.00	-£2,500.00			
31/10/14	100.00	100.00	500.00	£6,250.00	0.00	£0.00	-£2,500.00	-£5,625.00			

Note: Order Start, Estimated End and Payment Dates are automatically added by ESM, if entered.

Other key project dates can be added as shown in 3.3 below

## 2. Setup/add Activity Blocks (Planner Dates) to the Planner

You can set up as many 'Planner Dates' as you need to allow you to manage and control your projects. You can do this at any time, but you should give consideration to this when setting up the Construction Module for first time use.



From the ESM Menu, navigate to: Setup>>Construction>>Planner Dates to bring up the Setup Planner Dates window.

Select 'New Name' to add a new Planner date. Using the colour sliders allow you to enter a unique colour for the date block as it appears in the planner chart.

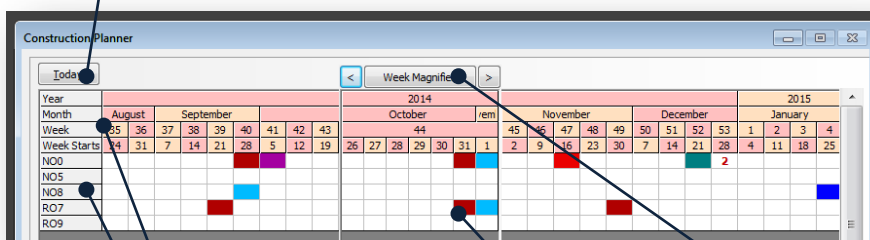
Note: Adding a new Planner Date will automatically add a new item to the 'Goto' dropdown in the Lower Construction Planner window after the Planner has been refreshed (re-opened)

## 3. Construction Planner Navigation

Open the Construction Planner from the ESM Menu Construction>>Project Planning.

### 3.1 Upper Window - All Projects Overview

Go to Today's Date



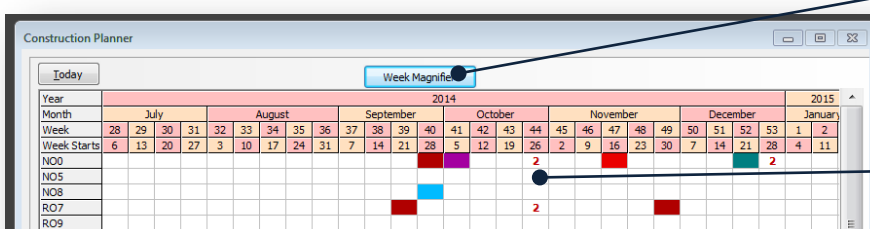
Date Navigator

Lists all Projects

Colour Coded Date/Activity Block

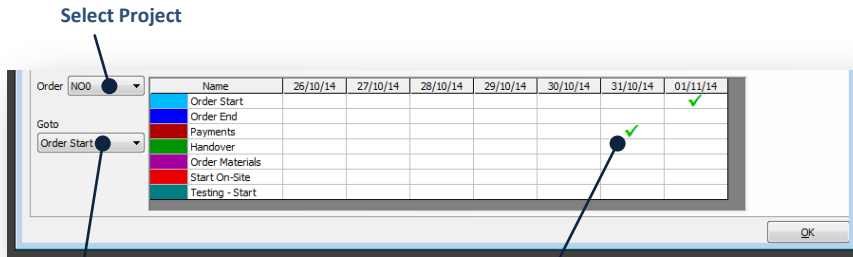
1. Goto Today's Date to start navigation and navigate projects and dates using the slider bars.

2. Use the 'Week Magnifier' to toggle daily detail for the selected week.



2 activities are recorded in this week

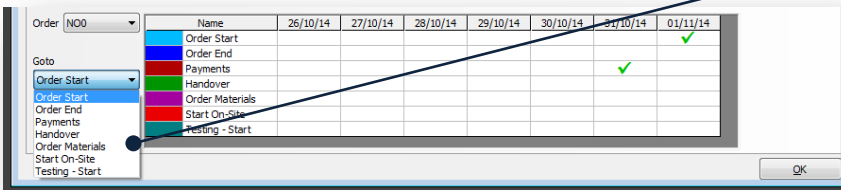
### 3.2 Lower Window - Review Specific Project



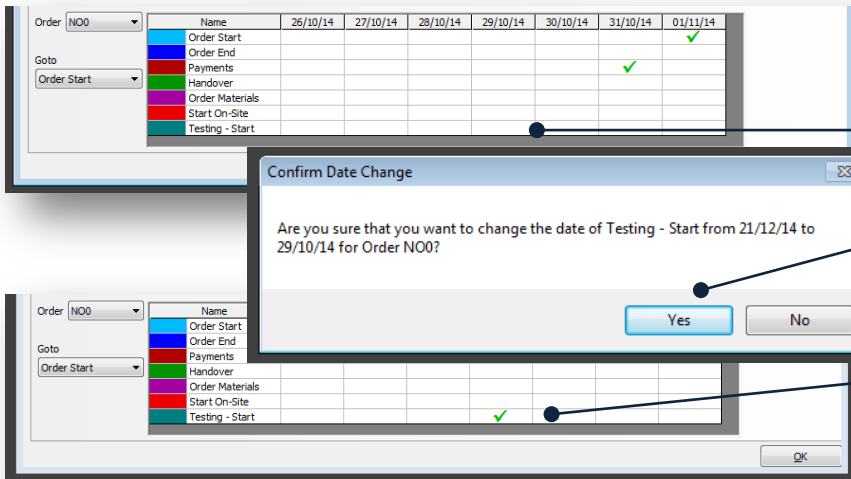
Select Planner Date

Planned Activity/ Project Milestone

- 3. Select Project of Interest
- 4. Use the drop down to automatically navigate to the Date block of interest.



### 3.3 Lower Window - Add/Revise Activity Date



- 5. Add/Revise a date by clicking on the date adjacent to Date Name.
- Accept the Confirm Date Change dialogue pop-up.
- The new date is added or revised date is changed on the Planner.

--- End ---