XER Schedule Toolkit
Schedule Viewer

The XER Schedule Toolkit

The toolkit is a desktop application that enables users to import schedule data from Oracle's Primavera P6 and/ or Microsoft Project and then display and analyse it within the familiar surroundings of Microsoft Excel.

The toolkit is developed by project control professionals and is supported by one of the largest privately owned engineering businesses within the United Kingdom (www.thespencergroup.co.uk).

Versatile Functionality, Yet Simple to Use

The toolkit has been designed with the needs of all project stakeholders in mind. Here are just a few of the possible users and uses:

Programme Managers can import multiple schedules from across a portfolio of projects and then analyse together or separately using a consistent approach to identify projects that are performing well and those that may need more attention.

Resource or Department Managers can import multiple schedules and analyse key resource demands across a portfolio of projects. The toolkit can help pinpoint over-committed resources and direct efforts to reschedule work based on the findings. Departmental commitments across different projects can also be viewed in a single schedule.

Project Managers can use the toolkit's dashboard templates to produce earned value analysis reports at the click of a button or build bespoke dashboards from project costs, units or other metrics. They can also use the toolkit to review the schedule, even filtering on areas of special interest. Extracts can be exported to standard Excel worksheets that can be shared with anyone using Excel.

Engineers and Designers can use the toolkit to filter and view the elements of the schedule for which they are responsible for delivery.

Planners and schedulers can use the toolkit's automated reporting capabilities to eliminate the effort manipulating data between P6 and Excel. The toolkit also provides advanced schedule quality diagnostic tools that can help enhance and drive improvements in schedule quality. There are also many other time saving tools and reports, each of which is designed to take the pain of data manipulation and presentation away.

The Schedule Viewer

The toolkit's viewer has been designed to provide ALL project stakeholders with intelligent access to schedule information, without the need for specialist software or training.
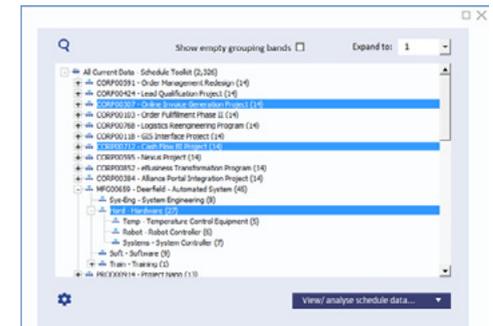
We believe that one of the best ways to improve project delivery is to raise awareness of the schedule throughout the project team.

We further believe that the best way to engage project stakeholders with the planning process is to provide tools that allow them to filter, view and analyse the programme in a way that best suits them, rather than provide reams of PDF print offs where important detail can easily be lost.

The Gantt chart can be saved within a standard Excel worksheet, enabling end users to utilise standard Excel functionality such as data searching and filtering.

The toolkit can display and analyse schedule data at any level from portfolio overview right down to individual project WBS elements.

By using the toolkit's advanced group and filter capabilities, users can target specific areas for deeper analysis.

The toolkit makes data schedule viewing and analysis easy with default viewing layouts, but at the click of a right mouse button, users can change and adapt the view to include the information that is important to them.

Hide gantt
Hide logic
Display settings
Show float
Hide baseline

The toolkit schedule viewer has been developed with the non-project control professional in mind with features such as the self-adjusting timescale but also retains all of the adaptability that a seasoned planning engineer might wish to find.

Timescale options
Auto fit - All data
Auto fit - Current page
Auto fit - This year
Auto fit - Today + 1 year

Individual tasks can be interrogated to view resource and cost assignments. Activity steps can also be viewed along with the predecessor and successor tasks.

General & costs	Relationships	Activity Codes	UDFs	Assignments	Expenses	Dates & Durations	Steps

◉ Cost ○ Units

		Res ID Name	Role ID Name	Budget	Actual	Remain
Budget cost	6,687.00	FieldEngSnr - Field Eng-Senior	IT - IT	3,762.00	0.00	3,762.00
Remain cost	6,687.00	ResnerW - Wendy Resner	-	2,925.00	0.00	2,925.00
Actual cost	0.00					
Completion cost	6,687.00					
Budget units	84.60					
Remain units	84.60					
Actual units	0.00					
Completion units	84.60					

With over 100 schedule data columns to choose from, many of which frustratingly cannot be found within Primavera itself, the toolkit provides unrivalled access to schedule information.

Baseline Dates
Baseline Durations
Baseline Units
Baseline Costs
Codes
Blank
Costs
Dates
Durations
Earned Value
General
Lists
Schedule Quality
Units
User Defined

Columns Available

Activity % Complete
BL Variance Planned Vs At Comp (Cost)
Duration % Complete
Earned Value (Cost)
Earned Value (Lab Units)
Earned Value (Non-Labour Units)
Labour Unit % Complete
Physical % Complete
Planned % (Duration)
Planned Value (Cost)
Planned Value (Lab Units)
Planned Value (Non-Labour Units)
Schedule Variance (Cost)
Schedule Variance (Lab Units)
Schedule Variance (Non-Labour Units)
Variance (Cost)

☐ Show basic columns only

Comparison between current programme and baseline are easy to analyse with red/ green formatted variance columns. Baseline variance can be viewed within the schedule viewer for dates, durations, cost or units.

'Quick filters' provide further opportunity to refine the activities displayed in the Gantt chart, ensuring that nothing important is missed and that inconsequential activities are excluded.

Look ahead schedules can be produced quickly and easily:

As with all XER Toolkit outputs, the schedule viewer's Gantt chart can be exported to a standard MS Excel worksheet. All standard Excel functionality applies to the exported Gantt chart worksheet so users can filter data, format the appearance, add additional commentary etc. after which the workbook can then be shared with anyone using MS Excel (2007+).
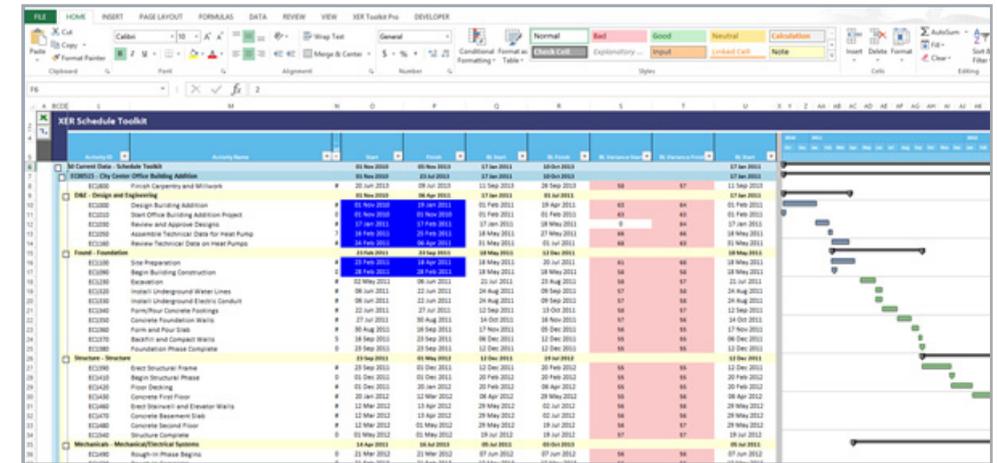
Compatibility

- MS Windows (All versions)
- MS Excel 2007+
- Primavera XER File (All versions of Primavera P5/ P6)
- Primavera XML File (All versions of Primavera P5/ P6)
- Primavera database direct access (MS SQL or Oracle)
- MS Project (MPP) File

Inputs and Outputs

The XER Schedule Toolkit's input sources are:

Primavera XER Files

Primavera Database (Oracle & SQL Servers)

MS Project (MPP) Files

Primavera XML Files