Tekla EPM 2019

Project Management

April 2019

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1 Set up the Project Management module

Before you start to use the **Project Management** module, we recommend that you take the time to customize the properties and available items according to your needs. Once you have created and modified all necessary items and settings, working in the **Project Management** module is easier and more efficient.

When setting up the **Project Management** module, you can:

- Customize the display and input fields in the **Drawing Log**, **Transmittals**, **RFIs**, **Journal**, and **Change Orders** dialog boxes.
- Create, modify, and delete the resources that are available in the production schedule.
- View and filter the production schedule.
- Create, modify, and delete calendars that are available for the project schedule.
- Modify the project schedule settings.
- Create templates that you can apply to quickly create a baseline for the project schedule.
- Define the standard settings used in the **Project Management** module.
- Create, modify, and delete approval statuses available for drawings.
- Create, modify, and delete common steps that are available for all project management jobs.
- Delete project management jobs.
- Rename project management jobs.
- Set job groups for project management jobs.
- Create, modify, and delete methods that are available for sending documents.
- Create, modify, and delete items that are commonly used in transmittals.

- Create, modify, and delete commonly used purposes for transmittals.
- Create, modify, and delete pieces of text that are commonly used in transmittals.
- Create reports for all or a group of project management jobs.

Many of the settings and selections can be saved by user. This way, each user can adjust Tekla EPM to meet their individual needs and preferences without changing the default settings.

For more information, see the following links:

Create, modify, and delete schedule calendars (page 19)

Modify the project schedule settings (page 11)

Create, modify, and delete schedule templates (page 12)

Define company standard settings for Project Management (page 8)

Create, modify, and delete approval statuses (page 21)

Create, modify, and delete common steps for project management jobs (page 23)

Manage project management jobs (page 24)

Create, modify, and delete methods for sending documents (page 26)

Create, modify, and delete transmittal items (page 27)

Create, modify, and delete transmittal purposes (page 28)

Create, modify, and delete commonly used text items for transmittals (page 29)

View, print, or export project reports (page 30)

1.1 Define company standard settings for Project Management

In the **Project Company Standards** dialog box, you can create settings that become the company default settings that are used for new project management jobs. If necessary, you can change the settings job by job.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Project Management** --> **Company Standards** .

3. In the **Project Company Standards** dialog box, adjust the following settings according to your needs:

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Job # Increment</td><td>Allows you to select the default option for automatic job numbering. The options are:
Increment from Last Job #:

When you create a new job, Tekla EPM uses the next available job number after the latest job number created.
Increment from Largest Job #: Tekla EPM uses the next available job number after the largest job number created.
Don't Increment: Automatic job numbering is not used.</td></tr>
<tr><td>Drawing Number Input Type</td><td>Allows you to select the input format for drawing numbers.</td></tr>
<tr><td>Drawing File Prefix</td><td>Allows you to determine the prefix that appears in the names of all drawing files that are imported.

Determining a drawing file prefix is optional. However, the drawing file prefix can help you to ensure that the correct files are imported from the selected folder.

Type the acceptable prefix in the Drawing File Prefix field.</td></tr>
<tr><td>Drawing File Suffix</td><td>Allows you to determine the suffix that appears in the names of all drawing files that are imported.

Determining a drawing file suffix is optional. However, the drawing file suffix can help you to ensure that the correct files are imported from the selected folder.

Type the acceptable suffix in the Drawing File Suffix field.</td></tr>
</table>

Option	Description
Transmittal Recipients Available	Allows you to select which companies can be selected as transmittal recipients. Click the arrow on the right side of the **Transmittal Recipients Available** list and select an option.
Transmittal Recipient Selection	Allows you to select which information is displayed for the companies in the **Recipient** list. Click the arrow on the right side of the **Transmittal Recipient Selection** list and select either the firm code or the firm name.
Keep Job Selection Screen Open	When selected, the **Select Project Management Job** dialog box stays open after a job has been opened. Otherwise, the selection screen closes when you open a job.
Update Production Control Approval Status	When selected, the approval statuses of shop drawings that are used in **Production Control** are automatically updated.
Resources - Use Period Ending Date	When selected, the date that is shown in production schedules for resources is the last date of a period. This option only applies when the scale of the schedule is set to week or month. For example, February 2019 would be shown as `2/28/2019` in the mm/dd/yyyy format. When cleared, the date that is shown is the first date of a period. In this case, February 2019 would be shown as `2/1/2019` in the mm/dd/yyyy format. For more information, see .
Job # Regular Expression	Allows the use of regular expressions to enforce a desired format for the job numbers. For more detailed instructions on job number regular expressions, click **Regular Expression Help**.

4. Click **Save** to update the company standard settings.

1.2 Set up schedules

Before creating project and production schedules, we recommend that you adjust the schedule settings according to your needs. You can also create the necessary schedule calendars and schedule templates, and modify or delete the existing ones.

For more information, see the following links:

Modify the project schedule settings (page 11)

Create, modify, and delete schedule calendars (page 19)

Create, modify, and delete schedule templates (page 12)

Modify the project schedule settings

In the **Schedule Settings** dialog box, you can set the default settings for project schedules. You can define settings for accessing and remaining in the edit mode, and set the default project breakdown levels and fields.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Project Management** --> **Schedule Settings** .
3. On the **Edit Mode** tab of the **Schedule Settings** dialog box, adjust the following settings:

Option	Description
Edit Mode Timeout	The number of seconds that a user can be in the edit mode without making changes before the edit mode times out. The edit mode ensures that Tekla EPM users do not make conflicting changes if they work on the project schedule simultaneously. Type the desired number of seconds in the **Edit Mode Timeout** field.
Auto-Acquire Edit Mode	When selected, Tekla EPM no longer asks you if you want to access the edit mode when making changes. This means that all changes to the project schedule are made without confirmation, provided that no other Tekla EPM users are currently in the edit mode and modifying the same project schedule.

4. Click the **Project Breakdown** tab to open it.
5. To define the available breakdown levels and fields, click the arrows next to the breakdown fields, and select suitable options in the list.

By default, two levels of breakdown items (sequences and lot numbers) are available. To make more levels available, select options in the **Default Breakdown Field 3**, **Default Breakdown Field 4**, and **Default Breakdown Field 5** lists. If you do not want a breakdown level to be available, select **None**.

For example, to enable categories as the breakdown level below lots, select **Category** in the **Default Breakdown Field 3** list.

6. Click **Save**.

The changes you made are saved as default settings for all new project schedules. If necessary, you can adjust the breakdown levels and fields on a job by job basis.

See also

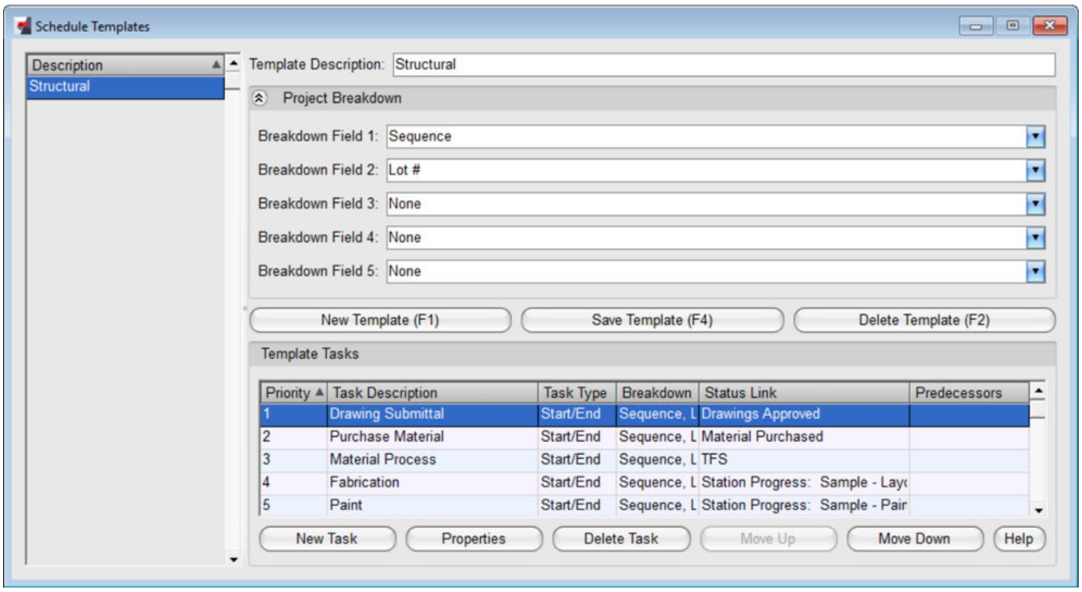
View and adjust the project schedule (page 121)

Create, modify, and delete schedule templates

In the **Schedule Templates** dialog box, you can create, modify, and delete templates that are used as the basis of project schedules with pre-determined tasks and settings. Creating schedule templates saves time when creating project schedules, because you can easily apply the template to any project schedule. When the template is applied to the project schedule, you can modify the tasks according to your needs.

To access the **Schedule Templates** dialog box, do the following:

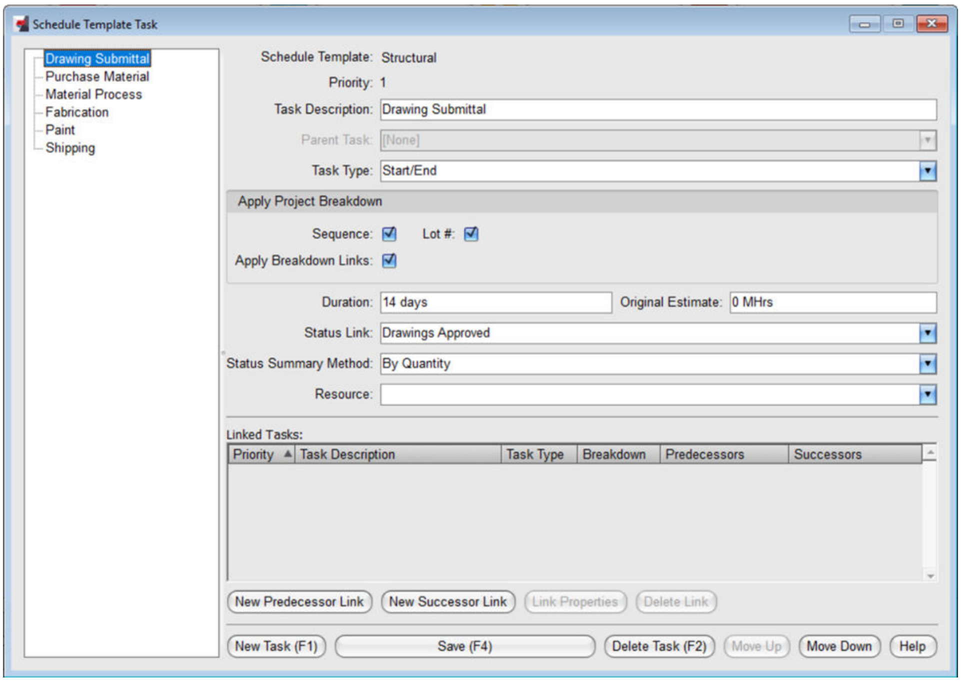
1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Project Management** --> **Schedule Templates** .



Create a schedule template

1. Click **New Template**.
2. In the **Template Description** field, type a name for the new template.
3. Click **Add Template**.

   The template is added to the list on the left side of the dialog box.
4. To add tasks to the template, do the following:
   a. Click **New Task**.



   b. In the **Schedule Template Task** dialog box, type a description for the task.
   c. Modify the task properties according to your needs:

Option	Description
Parent Task	If the task you are creating is a sub-task, for an existing task, you need to select the main task. Click the arrow on the right side of **Parent Task** field, and select a task in the list. If you are creating a top-level task, select **None**. Note that you cannot modify the task type, duration, or original estimate time of a main task if you add a sub-task.
Task Type	Specifies the behavior of the task on the **Gantt Chart** tab. The available task types are:

Option	Description
	• **Start/End**: an action to be performed over a period of time. Properties include the start date, end date, and duration. Start/end tasks can be directly re-sized an moved on the **Gantt Chart** tab. • **Summary**: takes the aggregate values from its sub-tasks. The start date of a summary task is automatically set to the earliest date of the sub-tasks. The end date is set to the latest sub-task end date, and the percent completed is aggregated based on the status summary method. Summary tasks cannot be re-sized on the **Gantt Chart** tab directly. However, the sub-tasks can be re-sized and moved, and the summary main task will re-sized and moved accordingly. • **Milestone**: an event in the schedule. For example, a project kickoff meeting can be a milestone task. The end date and the start date are always the same, and the duration is set to one day.
Apply Breakdown Links	When selected, the links set in the project schedule are added between sub-tasks. For example, any links set between sequences 1, 2, and 3 would be added.
Duration	The expected number of working days to complete a task. The duration can only be adjusted if the task type is set to **Start/End**. Type the number of days in the **Duration** field.
Original Estimate	The time originally estimated for the entire main task or a sub-task. The hours will automatically be distributed among the sub-tasks on the Gantt chart. Type the time in man hours in the **Original Estimate** field.
Status Link	The information that affects the status of the task when the project schedule is updated. The available options are: • **Drawings Approved**: the number of drawings with the **Approved** status.

Option	Description
	• **Material Purchased**: the production material that is linked to material that is either in stock or on order. • **Material Received**: the production material that is linked to material that is in stock. • **TFS**: the production material that has been cut. • **Production Completed**: the production material that has been assigned a route and has completed all stations in that route. • **Production Progress**: the production material that has been assigned a route and has completed some stations in that route. • **Station Progress**: the production material that has been assigned a route that includes the selected station and has completed that station. • **Shipping Destination Progress**: the production material that has been assigned a shipping route that includes the selected destination and has completed that destination. • **Shipping Completed**: the production material that has completed all assigned shipping destinations.
Status Summary Method	The method that determines how the percentage completed of a main task will be calculated from the sub-tasks. Each option specifies the weight that is given to each sub-task in the calculation. The available options are: • **No Factor**: no weight is given to the individual sub-tasks. The percentage completed of the main task is an average of the sub-tasks. • **By Quantity**: the percentage completed is weighed by the quantity of each sub-task. • **By Weight**: the percentage completed is weighed by the weight of each sub-task. • **By Duration**: the percentage completed is weighed by the duration of each sub-task.

Option	Description
Resource	An object with a time-based capacity to be added on a production schedule, and the resource by which station work will be executed. Linking a task from the project schedule to a resource connects the project and production schedules. Click the arrow on the right side of **Resource** list, and select a resource in the list.

d. Click **Add**.

e. Select the new task in the navigation tree.

f. In the **Link Tasks** section of the dialog box, define dependencies between two tasks.

By creating links, you can make the schedule cascade from one task to another.

Note that:

- A task cannot link to itself.
- A link cannot be created between a task and one of its sub-tasks.
- Duplicate links are not allowed. There can be only one link between a pair of tasks.
- Link cycles are not allowed. For example, if a link is created from task 1 to task 2, a link cannot be created from task 2 to task 1.
- When you use links, and the duration of an item changes, the positions of all linked items also changes. Do not link items that need to remain static, or are independent from other items in the schedule.

Do any of the following:

To	Do this
Add a link that ends with the current given task	Note that if a previous snapshot is displayed instead of the current project schedule information, you cannot add a predecessor link. 1. Click **New Predecessor Link**. 2. Click the arrow on the right side of **Link From** list, and in the list, select the starting task of the link. 3. Click the arrow on the right side of upper **Position** field, and in the list, select if the link originates from the start or end of the starting task.

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td></td><td>4. Click the arrow on the right side of lower Position field, and in the list, select if the link ends at the start or finish of the second task.
5. In the Minimum Interval field, type the minimum number of working days between the two tasks.
The minimum interval is enforced in the Gantt chart. The later task cannot be moved earlier in the Gantt chart than the value in the Minimum Interval field determines.
6. Click Add.
7. In the confirmation dialog box, click Yes.
For example, to set that shipping must start when the fabrication is finished, select Shipping and set the link a follows:
• Link From: Fabrication
• Upper Position: Finish
• Lower Position: Start
• Minimum Interval: <code>0 days</code></td></tr>
<tr><td>Add a link that begins with the current task</td><td>Note that if a previous snapshot is displayed instead of the current project schedule information, you cannot add a successor link.
1. Click New Successor Link.
2. Click the arrow on the right side of upper Position field, and in the list, select if the link originates from the start or end of the starting task.
3. Click the arrow on the right side of Link To field, and in the list, select the task that is the ending point of the link.
4. Click the arrow on the right side of lower Position field, and in the list, select if the link ends at the start or finish of the second task.
5. In the Minimum Interval field, type the minimum number of working days between the two tasks.
The minimum interval is enforced in the Gantt chart. The later task cannot be moved earlier in the Gantt chart than the value in the Minimum Interval field determines.</td></tr>
</table>

To	Do this
	6. Click **Add**. 7. In the confirmation dialog box, click **Yes**. For example, to set that shipping must start when the fabrication is finished, select **Fabrication** and set the link a follows: • Upper **Position**: **Finish** • **Link To**: **Shipping** • Lower **Position**: **Start** • **Minimum Interval**: `0 days`
View and modify link properties	1. Click **Link Properties**. 2. Modify the starting task, ending task, the task positions, and interval according to your needs. 3. Click **Save** to update the link properties.
Delete a link	1. Click a link in the list to select it. 2. Click **Delete Link**. 3. In the confirmation dialog box, click **Yes** to permanently delete the links.

g. To save the links, click **Save**.

h. To close the **Schedule Template Task** dialog box, click the **Close** button (**X**) in the upper-right corner.

Repeat steps a to i for all tasks that you want to add to the template.

5. In the **Schedule Templates** dialog box, click **Save Template**.

Modify a schedule template

1. In the list on the left of the **Schedule Templates** dialog box, select the template that you want to modify.
2. Do any of the following:

To	Do this
Add a task to the schedule template	See Create a schedule template.
Modify an existing task	a. In the **Template Tasks** list, select the task that you want to modify. b. Click **Properties**.

To	Do this
	c. In the **Schedule Template Task**, modify the task description, properties, and links according to your needs. For more information on task properties and links, see Create a schedule template. d. Click **Save** to save the changes.
Move a task earlier or later in the schedule template	a. In the **Template Tasks** list, select the task that you want to move earlier or later in the schedule template. b. Click the **Move Up** and **Move Down** to change the location of the task.
Delete a task from the schedule template	Note that deleting a task from the schedule template is permanent and cannot be undone. a. In the **Template Tasks** list, select the task that you want to delete. b. Click **Delete Task**. c. To permanently delete the task, click **Yes** in the confirmation dialog box.

3. Click **Save Template** to save the changes.

Delete a schedule template

Note that deleting a schedule template is permanent and cannot be undone.

1. In the list on the left of the **Schedule Templates** dialog box, select the template that you want to delete.
2. Click **Delete Template**.
3. To permanently delete the schedule template, click **Yes** in the confirmation dialog box.

Create, modify, and delete schedule calendars

Schedule calendars determine the working days in a project schedule. By default, Tekla EPM uses a schedule calendar with a five-day working week from Monday to Friday, excluding national holidays. If necessary, in the **Schedule Calendars** dialog box, you can create additional schedule calendars. For example, this can be useful if your shop has a seven-day working week. You can also modify or delete the existing schedule calendars, and select which schedule calendar is used as the default option.

To access the **Schedule Calendars** dialog box, do the following:

1. Click the **Maintenance** ribbon tab.

2. In the menu, select **Project Management** --> **Schedule Calendars** .

You can view the existing schedule calendars on the left side of the **Schedule Calendars** dialog box.

Create a schedule calendar

1. Click **New**.
2. In the **Calendar Description** field, type a name for the new calendar.
3. Select the check box next to each weekday that you want to mark as a working day.

   Note that in the calendar at the bottom of the dialog box, the non-working days are bolded.
4. Click **Add**.

The new schedule calendar is added to the list on the left side of the dialog box. If necessary, you can now add working day exceptions to the schedule calendar.

Add working day exceptions

If necessary, you can add working day exceptions to a schedule calendar. For example, you can set national holidays as non-working days, or set a particular Saturday or Sunday as a working day.

1. In the list on the left side of the **Schedule Calendars** dialog box, click the calendar to which you want to add working day exceptions.
2. At the bottom of the dialog box, click **Working Day Exceptions**.
3. In the **Schedule Calendar - Working Day Exceptions** dialog box, click **New**.
4. Type a description for the working day exception.
5. If you want the date to be a working day, select the **Is Working Day** check box.
6. Select the exception date in the calendar.
7. Click **Add**.

The working day exception is added to the list on the left side of the **Schedule Calendar - Working Day Exceptions** dialog box.

If necessary, you can select a working day exception in the list, and then either:

- Modify the working day exception by changing its properties and clicking **Edit**.
- Delete the working day exception by clicking **Delete**, and then **Yes** to confirm.

Set a schedule calendar as the default option

The current default schedule calendar is marked with an asterisk (*) in the list on the left side of the **Schedule Calendars** dialog box. If you want to use another calendar as the default option, do the following:

1. In the list on the left side of the **Schedule Calendars** dialog box, click the calendar that you want to set as the default option.
2. Click **Set as Default**.
3. In the confirmation dialog box, click **Yes** to set the selected calendar as the default option in all new project schedules.

The selected calendar is set as the default option and marked with an asterisk (*).

Modify a schedule calendar

1. In the list on the left side of the **Schedule Calendars** dialog box, click the calendar that you want to modify.
2. In the **Calendar Description** field, modify the name of the calendar.
3. Select the check box next to each weekday that you want to mark as a working day.
4. Click **Edit** to save the changes.

Delete a schedule calendar

Deleting a schedule calendar is permanent and cannot be undone. Note that the default calendar cannot be deleted.

1. In the list on the left side of the **Schedule Calendars** dialog box, click the calendar that you want to delete.
2. Click **Delete**.
3. In the confirmation dialog box, click **Yes** to permanently delete the calendar.

1.3 Create, modify, and delete approval statuses

In the **Approval Status** dialog box, you can create, modify, or delete approval statuses for drawings. The **Approval Status** dialog box is available through both the **Production Control** module and the **Project Management** module.

To access the **Approval Status** dialog box, do the following:

1. Click the **Maintenance** ribbon tab.

2. In the menu, select **Production Control** --> **Approval Status Maintenance** or **Project Management** --> **Approval Status Maintenance** .

The **Approval Status** dialog box opens. You can view all existing approval statuses.

Create an approval status option

1. Click **New**.
2. In the **Approval Status** field, type an abbreviation for the new approval status.
3. In the **Description** field, type a description for the new approval status.
4. If you wish, in the **Purpose** list, select if items with the status option are approved or on hold.

   No matter how many approval statuses you create, the only available purpose options are **Approved** and **Hold**.

   Approved means that drawings are ready for fabrication. The **Approved** purpose is used as the status link in the project schedule.

   whereas **Hold** means that the drawings are not ready for fabrication. Items with the **Hold** option can move through fabrication processes, but they will be highlighted in red, and warning pop ups will appear during processing updates. Any loads that contain items with the **Hold** purpose option cannot be shipped.
5. Click **Add**.

Modify an existing approval status

1. In the list, click the approval status that you want to modify.
2. Modify the approval status abbreviation, description, and purpose according to your needs.
3. Click **Edit** to save the changes.

Delete an approval status

Note that deleting an approval status is permanent and cannot be undone.

1. In the list, click the approval status that you want to delete.
2. Click **Delete**.

3. In the confirmation dialog box, click **Yes** to permanently delete the approval status.

1.4 Create, modify, and delete common steps for project management jobs

In the **Check List Item Maintenance** dialog box, you can create, modify, and delete check list items. Check list items are steps that are commonly performed in project management jobs, such as receiving a signed contract from the client. The check list items that you create in the **Check List Item Maintenance** dialog box are automatically available for all future project management jobs. However, you need to add them manually to existing project management jobs.

To access the **Check List Item Maintenance** dialog box, do the following:

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Project Management** --> **Check List Item Maintenance** .

The check list items created in the **Check List Item Maintenance** dialog box serve as reminders in each project management job. Tekla EPM also records the date when each of these tasks are completed and the user who performs the tasks.

Create a check list item

1. Click **New**.
2. In the **Description** field, type a description for the item.

   For example, `Get signed contract from the client`.
3. Click **Add**.

The check list item is now available for all project management jobs, and you can be assigned it to particular users' task lists within the projects.

To add the new check list item to an existing project management job, you need to do the following:

1. Open the project management job.
2. Click the **Project Management** ribbon tab.
3. In the menu, select **Check List**.
4. In the **Check List** dialog box, click the **Check List** ribbon tab.
5. In the menu, select **Add Additional Check List Items**.

6. In the **Add Check List Items** dialog box, click the arrow buttons to move the items that you want to add to the **Included** list.
7. Click **Add**.
8. In the **Check List** dialog box, click **Save**.

Modify a check list item

1. In the list, select the check list item that you want to modify.
2. Modify the item description according to your needs.
3. Click **Edit** to save the changes.

Change the position of a check list item

1. In the list, select the check list item that you want to move up or down in the list of tasks.
2. Click the **Position (+)** and **Position (-)** buttons to move the item to the desired position.

Delete a check list item

Note that deleting a check list item is permanent and cannot be undone.

1. In the list, select the check list item that you want to delete.
2. Click **Delete**.
3. To permanently delete the check list item, click **Yes** in the confirmation dialog box.

1.5 Manage project management jobs

In the **Project Maintenance** dialog box, you can manage existing project management jobs. You can delete and rename jobs, or set up job groups for sorting project management jobs.

To access the **Project Maintenance** dialog box, do the following:

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Project Management** --> **Job Maintenance** .
3. Select one of the available options to manage the existing jobs.

   The options are:

   - **Delete Jobs**

- **Rename Job**
- **Set Job Groups**

For more information, see the following links:

Delete project management jobs (page 25)

Rename a project management job (page 25)

Set job groups for project management jobs (page 25)

Delete project management jobs

You can delete unnecessary project management jobs at any time in the **Project Maintenance** dialog box.

Note that deleting a project management job is permanent and cannot be undone.

1. In the **Job Maintenance** dialog box, select the **Delete Jobs** option.
2. In the list, select the job that you want to delete.
3. Click **Delete**.
4. To permanently delete the selected job, click **Yes** in the confirmation dialog box.

Rename a project management job

Do the following to rename an existing project management job:

1. In the list, select the job that you want to rename.
2. In the **New Job Number** field, type a new name for the job.
3. Click **Rename**.

Set job groups for project management jobs

Job groups allow you to identify and sort projects that are similar. For example, you can create job groups based on the year or the project manager name. Assigning job groups to jobs makes it easier to sort a long list of jobs.

1. In the **Job Maintenance** dialog box, select the **Set Job Groups** option.
2. In the list, select the jobs for which you want to create a job group.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.
3. In the first empty field after **New Group**, type a name for the new group.

4. Click **Set Group**.

   The group name appears in the **Group** column for the selected job.

5. If necessary, add a secondary job group by typing a secondary group name in the second empty field after **New Group**.

6. Click **Set Secondary Group**.

   The secondary group name appears after the primary group name in the **Group** column. The two groups are separated with a hyphen.

1.6 Set up transmittals

Before you start creating transmittals, we recommend that you create the necessary methods for sending documents, transmittal items, transmittal purposes, and commonly used text for transmittals.

For more information, see the following links:

Create, modify, and delete methods for sending documents (page 26)

Create, modify, and delete transmittal items (page 27)

Create, modify, and delete transmittal purposes (page 28)

Create, modify, and delete commonly used text items for transmittals (page 29)

Create, modify, and delete methods for sending documents

In the **Sent Via Maintenance** dialog box, you can create, modify, and delete methods for sending documents. Sending methods allow you to mark how a document was sent to the recipient when you are creating transmittals. For example, documents can be sent via email, fax, or mail. You can also set the default method for sending documents.

To access the **Sent Via Maintenance** dialog box, do the following:

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Project Management** --> **Sent Via Maintenance** .

Create a sending method

1. Click **New**.
2. Type a description for the sending method.
3. Click **Add**.

Modify a sending method

1. In the list, select the sending method that you want to modify.
2. Modify the description according to your needs.
3. Click **Edit** to save the changes.

Set the default sending method

The current default sending method is marked with an asterisk (*). Note that you can also select another sending method for each document that you send.

1. In the list, select the sending method that you want to set as the default option.
2. Click **Set as Default**.
3. To confirm using the sending method as the default option, click **Yes** in the confirmation dialog box.

The selected sending method is set as the default option and marked with an asterisk (*).

Delete a sending method

Note that deleting a sending method is permanent and cannot be undone.

1. In the list, select the sending method that you want to delete.
2. Click **Delete**.
3. To permanently delete the sending method, click **Yes** in the confirmation dialog box.

Create, modify, and delete transmittal items

In the **Transmittal Item Maintenance** dialog box, you can create, modify, and delete commonly used items that are sent with a transmittal. These items also appear in the transmittal document. Creating transmittal items saves time, because you do not have to type each item manually when you create a transmittal in the **Transmittals** dialog box. Instead, you can select existing transmittal items in the **Items** list.

To access the **Transmittal Item Maintenance** dialog box, do the following:

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Project Management** --> **Transmittal Item Maintenance** .

Create a transmittal item

1. Click **New**.
2. Type a description for the transmittal item.
3. Click **Add**.

Modify a transmittal item

1. In the list, select the transmittal item that you want to modify.
2. Modify the item description.
3. Click **Edit** to save the changes.

Delete a transmittal item

Note that deleting a transmittal item is permanent and cannot be undone.

1. In the list, select the transmittal item that you want to delete.
2. Click **Delete**.
3. To permanently delete the transmittal item, click **Yes** in the confirmation dialog box.

Create, modify, and delete transmittal purposes

In the **Transmittal Purpose Maintenance** dialog box, you can create, modify, and delete commonly used purposes for sending transmittals. The purpose of the transmittal appears on the transmittal document and informs the recipient why the document has been sent. Creating transmittal purposes saves time, because you do not have to type the purposes manually each time that you create a transmittal in the **Transmittals** dialog box. Instead, you can select existing transmittal purposes in the **Purpose** list.

To access the **Transmittal Purpose Maintenance** dialog box, do the following:

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Project Management** --> **Transmittal Purpose Maintenance** .

Create a transmittal purpose

1. Click **New**.
2. Type a description fot the transmittal purpose.
3. Click **Add**.

Modify a transmittal purpose

1. In the list, select the transmittal purpose that you want to modify.
2. Modify the purpose description according to your needs.
3. Click **Edit** to save the changes.

Delete a transmittal purpose

Note that deleting a transmittal purpose is permanent and cannot be undone.

1. In the list, select the transmittal purpose that you want to delete.
2. Click **Delete**.
3. To permanently delete the transmittal purpose, click **Yes** in the confirmation dialog box.

Create, modify, and delete commonly used text items for transmittals

In the **Transmittal Standard Text Maintenance** dialog box, you can create, modify, and delete commonly used text items that can be added to transmittal documents. For example, a text item can contain information on how quickly the recipient should react to the transmittal. Creating text items saves time, because you do not need to type the text each time you create a similar transmittal in the **Transmittals** dialog box. Instead, you can select an applicable text item in the **Standard Text** list.

Note that you can only add one text item per transmittal.

To access the **Transmittal Standard Text Maintenance** dialog box, do the following:

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Project Management** --> **Transmittal Standard Text Maintenance** .

See any of the following sets of instructions according to your needs.

Create a text item

1. Click **New**.
2. In the **Description** field, type a name for the text item.

   This name will appear in the **Standard Text** list of the **Transmittals** dialog box.
3. In the **Standard Text** field, type the text that you want to include in the text item.
4. Click **Add**.

Modify a text item

1. In the list, select the text item that you want to modify.
2. Modify the description and text according to your needs.
3. Click **Edit** to save the changes.

Delete a text item

Note that deleting a standard text item is permanent and cannot be undone.

1. In the list, select the text item that you want to delete.
2. Click **Delete**.
3. To permanently delete the text item, click **Yes** in the confirmation dialog box.

1.7 View, print, or export project reports

Use the **Project Reports** command to create reports that contain information from a group of project management jobs. You can either view or print the reports, or export the reports to another file format.

Create a project report

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Project Management** --> **Project Reports** .
3. In the **Select Project** dialog box, click the arrow buttons to move the projects that you want to include in the report to the **Included** list.
4. To only include particular types of items in the report, in the **Project Management Report Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
5. In the **Filter** dialog box, do one of the following depending on the filter type:
   - Click the arrow buttons to move the items that you want to include to the **Included** list.
   - Type the maximum and minimum values for the items that you want to include.
6. Click **OK**.

7. In the **Report On** section of the dialog box, select check boxes on the right side of the information for which you want to create reports.

   For example, to create a drawing list, select the **Drawings** check box.
8. Click **Make Report**.
9. In the **Report Selection** dialog box, select the report that you want to create.

View the report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the report

1. Click **Export**.
2. In the **Export Format** list, select an export format.
3. Click **Browse**.
4. Browse to the location where you want to save the exported file, and click **Save**.
5. Modify the file name according to your needs.
6. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
7. If you want to open the file after exporting it, select the **Open Exported Document** check box.
8. Click **Export**.

2 Manage projects

The **Project Management** module brings together all information regarding the project: the information from the related estimating jobs or combining jobs, and the materials, hours, weight, sequencing and tracking from the related production control job. You can bring information from multiple estimating jobs, combining jobs, and production control jobs to the project management job. In **Project Management**, you can add drawings and journal entries, create transmittals or requests for information, and assign tasks to Tekla EPM users.

NOTE Before you start working in the **Project Management** module, ensure that you have adjusted the project management settings according to your needs. For more information, see Set up the Project Management module (page 7).

For more information, see the following links:

Open the Project Management module (page 33)

Create a project management job (page 33)

Open a project management job (page 36)

Store document references for a project management job (page 37)

Manage and assign project tasks (page 46)

Manage companies in the project (page 48)

Manage drawings (page 50)

Manage transmittals (page 64)

Manage requests for information (page 78)

Manage the project journal (page 94)

Manage change orders (page 101)

Manage the project task list (page 111)

Manage the project check list (page 116)

View and adjust the project schedule (page 121)

Manage contract and invoicing information (page 166)

View, print, or export the project summary (page 174)

Import and export project management information (page 176)

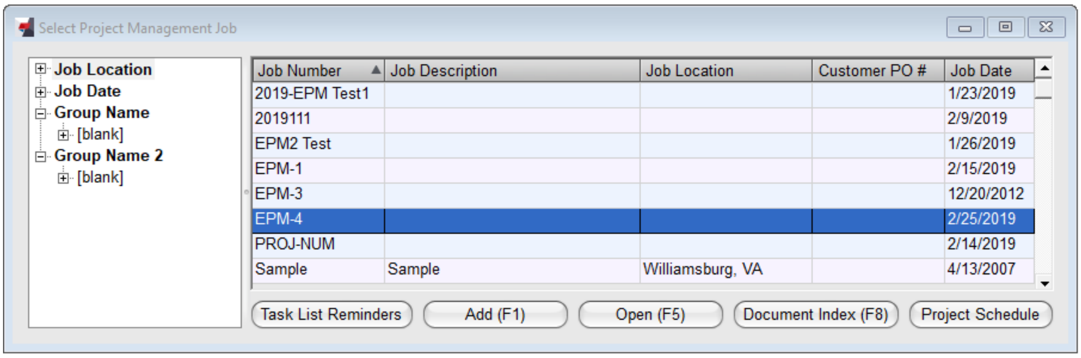
View, print, or export project management reports (page 179)

2.1 Open the Project Management module

To start adding and modifying the information in a project, you need to open the **Project Management** module:

- On the top of the Tekla EPM window, click the **Project Management** button.

The **Select Project Management Job** dialog box opens.



Next, you can:

- View, add, and modify task list reminders.
- Create a new project management job.
- Open or modify an existing project management job.
- Attach document to a project management job in **Document Index**.
- View and modify the project schedule of the selected project management jobs.

See also

Open a project management job (page 36)

Store document references for a project management job (page 37)

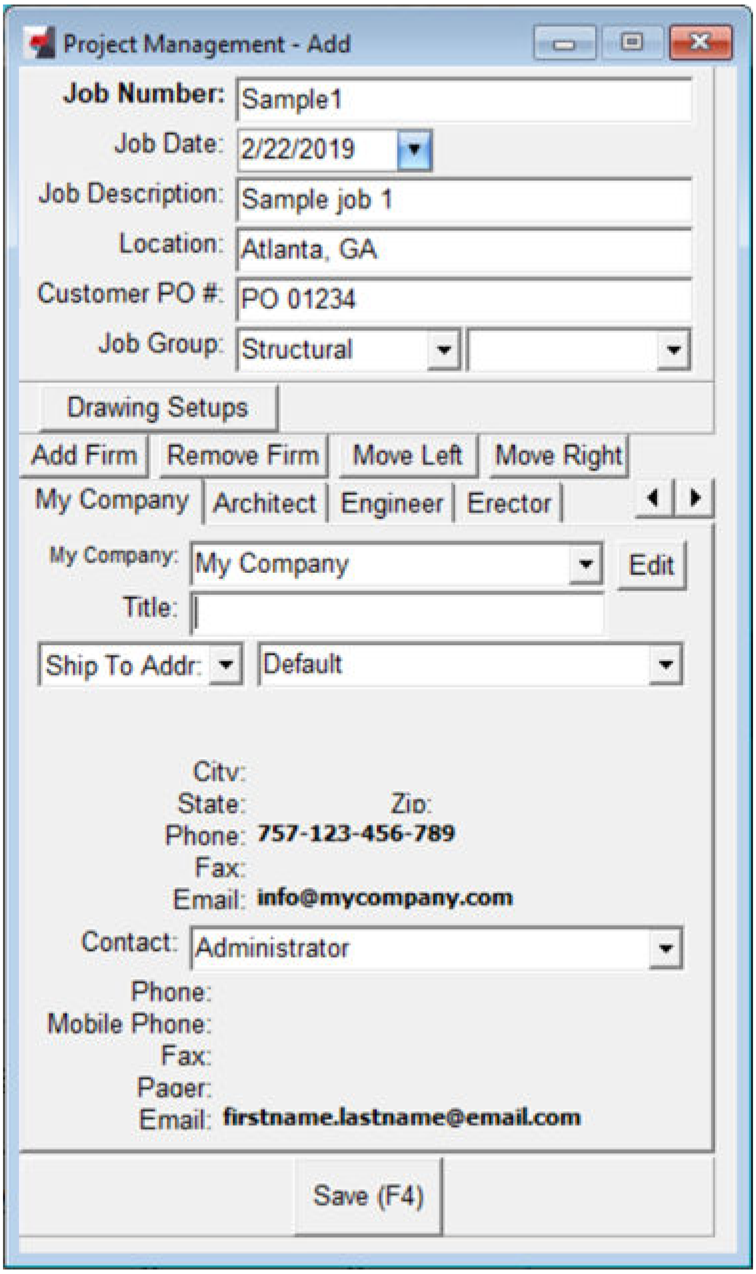
Manage and assign project tasks (page 46)

View and adjust the project schedule (page 121)

2.2 Create a project management job

To create a project management job, do the following:

1. On the top of the Tekla EPM window, click the **Project Management** button.
2. In the **Select Project Management Job** dialog box, click **Add**.



3. At the top of the **Project Management - Add** dialog box, define the properties of the new job.

The properties marked with an asterisk (*) are mandatory information.

Option	Description
Job Number *	The job name. Type a suitable name in the **Job Number** field.
Job Date	The job date. Tekla EPM automatically uses the current date. For example, you can select the date when your company received the job, or the shipping date. The job date is used as the initial start date of the project in the project schedule. Click the arrow on the right side of **Job Date** field, and select a date in the calendar.
Job Description	Any description of the job. Type a description in the **Job Description** field.
Location	The city or town of the project management job. Type the appropriate location in the **Location** field.
Customer PO #	The purchase order number of the customer company, or the contract number. Type the number in the **Customer PO #** field.
Job Group	The job groups that the current project management job belongs to. Click the arrows on the right side of the **Job Group** fields and select existing job groups in the list, or type new job groups directly in the fields.

4. If necessary, modify the drawing settings of the new job:
    a. Click the **Drawing Setups** button.
    b. In the **Drawing Setup** dialog box, modify the drawing settings according to your needs.

       For more information on the properties, see Define company standard settings for Project Management (page 8).

       NOTE The **Drawing Number Input Type** needs to be the same in the project management job and the related production control jobs.

    c. Click **OK**.
5. Add all companies related to the new job and their contact persons:
    a. Click **Add Firm**.
    b. In the **Select** dialog box, select the appropriate firm type.

c. Click the arrow on the right side of uppermost list, and select the company that you want to add.

   Only companies added in **Address Book** with the same firm type can be selected in the list.

d. If necessary, change the company tab name by typing a new name in the **Title** field.

e. Select if you want to use the shipping or billing address of the company.

f. If the company has multiple shipping or billing addresses, select the appropriate one in the address list.

g. Click the arrow on the right side of **Contact** list, and select the contact person related to the project.

Repeat steps a to g for all companies that you want to add to the project.

Sometimes, a company might need to be added more than once for a project. This is because the different contact persons within the company can have different roles in the project. For example, there might be a billing contact, a project management, a project engineer, and a site supervisor. You can change the name in the **Title** field to match these roles.

6. Click **Save** to create the job.

You can now open the new project management job (page 36) and start modifying it.

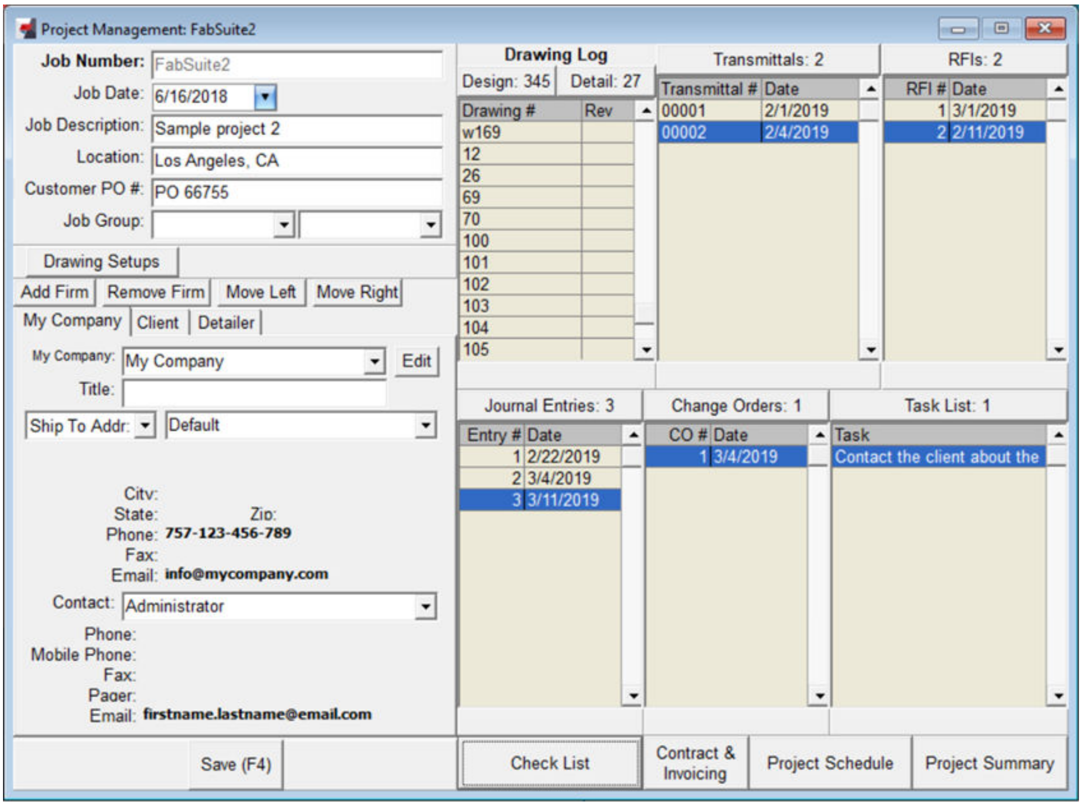
Note that you can link a project management job to a matching production control job. For more information, see .

2.3 Open a project management job

To open a project management job, do the following:

1. On the top of the Tekla EPM window, click the **Project Management** button.
2. In the **Select Project Management Job** dialog box, select the job that you want to open.
3. Double-click the job, or click **Open**.

The **Project Management** dialog box opens. Here, you can view the current information of the project, and add information according to your needs. You can modify any information in the project except for the job name.



See also

Manage drawings (page 50)

Manage transmittals (page 64)

Manage requests for information (page 78)

Manage the project journal (page 94)

Manage change orders (page 101)

Manage the project task list (page 111)

Manage the project check list (page 116)

Manage contract and invoicing information (page 166)

View, print, or export the project summary (page 174)

2.4 Store document references for a project management job

Document Index is where you can store documents for reference. When you store documents in **Document Index**, each user who has access to the project management job can view them, so it is easy to keep up to date on the project. You can save any documents, as well as Microsoft Outlook emails, in **Document Index**.

Note that all project management jobs have their own document references.

To access **Document Index**, do the following:

1. In the **Select Project Management Job** dialog box, select the job whose document references you want to view or modify.
2. Click **Document Index**, or press **F8**.

The **Document Index** dialog box opens. Next, you can either modify the available folders for document references, or add, modify, delete, open, and email document reference files.

See also

Manage document reference categories (page 38)

Open a document reference (page 44)

Add document references for estimating jobs (page 40)

Modify a document reference (page 44)

Attach a document reference to an email (page 45)

Delete a document reference (page 45)

Manage document reference categories

Use the **Edit Categories** command in **Document Index** to manage the categories that you can use to organize document references. You can add new categories, rename categories, and delete unnecessary categories. You can also change the default folder where document references are saved.

1. At the bottom of the **Document Index - By Category** dialog box, click **Edit Categories**.
2. In the **Document Index - Edit Categories** dialog box, do any of the following:

To	Do this
Add a new category	a. In the navigation tree at the top of the dialog box, select the parent category for the new category.

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td></td><td>b. Click Add.
c. Type a name for the new category.
For example, <code>Miscellaneous documents</code>.
d. Click OK.
The new category is added to the list.</td></tr>
<tr><td>Rename a category</td><td>a. In the navigation tree at the top of the dialog box, select the category that you want to rename.
b. Type a new name for the category.
c. Click OK.
The category name is updated.</td></tr>
<tr><td>Delete a category</td><td>a. In the navigation tree at the top of the dialog box, select the category that you want to delete.
b. Click Delete.
Note that you cannot delete a category that has sub-categories.
c. To permanently delete the category, click Yes in the confirmation dialog box.</td></tr>
<tr><td>Change the default folder where documents are saved</td><td>When documents are added in Document Index, the selected document can be either moved or copied to the selected folder. This way, Tekla EPM retains all documents that have been saved to Document Index, even if the original documents are moved or deleted.
The default folder for saving documents needs to be in the Tekla EPM default folders, so that all users can view the attached documents. Files saved elsewhere than the default location cannot be viewed by other Tekla EPM users.
a. Click Default Dir.
b. Do one of the following:
• Select the folder that you want to use as the default folder.
• Click Make New Folder to add a new folder under the currently selected one, and click it to use it as the default folder.
c. Click OK.</td></tr>
</table>

3. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

Add document references for estimating jobs

You can either upload completely new document references, such as documents, Microsoft Outlook emails, and Microsoft Outlook email attachments to **Document Index**, or add documents already loaded to **Document Index** for the current job.

Add new documents

1. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the document.
2. Click **Add Document Reference**.

   If you are viewing the document references of multiple modules and have not selected a module-specific category in the navigation tree, Tekla EPM asks you for which module you want to save the file.
3. Select the desired module.
4. In the **Document Index - Add Document Reference** dialog box, click **Add File**.

   You can also drag and drop files to the **Document Index - Add Document Reference** dialog box. If you do so, skip steps 5 and 6.
5. In the **Open** dialog box, browse to find the document that you want to add, and select the document.
6. Click **Open**.

   If you want to add more documents with the same settings, click **Add Additional File** and repeat steps 4 to 6 for each document.
7. In the **Add File** dialog box, select the company and contact that provided you with the document in the **File Source** lists.

   You can also drag and drop files to the **Add File** dialog box.
8. According to your needs, do one of the following:
   - To compress multiple documents into one archive, select the **Compress Files into a Single Archive** option.
   - To leave the documents that you added uncompressed, select the **Leave Files Uncompressed** option.
9. If you want to change the folder where the document is saved, click **Browse** and select a new folder.
10. According to your needs, do one of the following:

- To move the original document to the selected folder, select the **Move File** option.
- To copy the document to the selected folder but leave the original untouched, select the **Copy File (Leave Original)** option.

11. Type a description for the attached document.
12. Click **Add File**.
13. Type a description for the entire document reference.

    This description applies to all documents, emails, and email attachments that you add.
14. When you have added all necessary documents, emails and email attachments, click **Add Document Reference**.

The **Document Index - Add Document Reference** closes, and the documents are added to **Document Index**. You can see all added documents in the list in the **Document Index - By Category** dialog box.

Add a Microsoft Outlook email

1. In Microsoft Outlook, select the email that you want to add.
2. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the email.
3. Click **Add Document Reference**.
4. In the **Document Index - Add Document Reference** dialog box, click **Add Outlook Email**.

    A copy of the email is added to **Document Index**.

    The text of the email is added to the **Description** field.
5. Click **Add File**.
6. Type a description for the entire document reference.

    This description applies to all documents, emails, and email attachments that you add.
7. When you have added all necessary documents, emails and email attachments, click **Add Document Reference**.

The **Document Index - Add Document Reference** closes, and the emails are added to **Document Index**.

Add an attachment from a Microsoft Outlook email

1. In Microsoft Outlook, select the email with the attachment that you want to add.
2. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the attachment.

3. Click **Add Document Reference**.
4. In the **Document Index - Add Document Reference** dialog box, click **Add Outlook Attachments**.
5. Browse to the folder where you want to save the email attachment, and click the folder to select it.
6. Click **Open**.
7. In the **Add File** dialog box, select the company and contact that provided you with the email attachment in the **File Source** lists.
8. According to your needs, do one of the following:
   - To compress multiple email attachments into one archive, select the **Compress Files into a Single Archive** option.
   - To leave the email attachments you added uncompressed, select the **Leave Files Uncompressed** option.
9. Type a description for the email attachment.
10. Click **Add File**.
11. Type a description for the entire document reference.

    This description applies to all documents, emails, and email attachments that you add.
12. When you have added all necessary documents, emails and email attachments, click **Add Document Reference**.

The **Document Index - Add Document Reference** closes, and the email attachments are added to **Document Index**.

Search for and add a document already in Document Index

To find and add documents for the current job that are already saved in **Document Index**, use the **Search** command.

1. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the document.
2. Click **Add Document Reference**.
3. In the **Document Index - Add Document Reference** dialog box, click **Search**.
4. In the **Search** dialog box, click **Browse** and select the folder where you want to look for documents.

   TIP To also search from the sub-folders of the selected folder, select the **Sub-Directories** check box.

5. To narrow the search, do one or more of the following:
   - Type the document name, document size, and file name extension.

- In **File Date**, select the dates between which the document has been created or downloaded onto your computer.
- In **Date Loaded**, select the dates between which the document has been added to **Document Index**.
- In the **Source** lists, select the contact and company that have provided the document.

6. To include archived documents in the search, select the **Include All Archive Files** check box.
7. Click **Search**.

   The search results appear at the top of the **Search** dialog box.
8. In the search results, double-click the document that you want to add.

The document is added to **Document Index** for the current job.

Browse for and add a document already in Document Index

To browse to and add documents to the current job that are already saved in **Document Index**, use the **Find By Directory** command. You can also add new documents, delete existing documents, rename documents and categories, move documents to other folders, and open documents.

1. In the navigation tree of the **Document Index - By Category** dialog box, select the category where you want to save the document.
2. Click **Add Document Reference**.
3. In the **Document Index - Add Document Reference** dialog box, click **Find By Directory**.
4. In the navigation tree on the left of the **Document Index - By Directory** dialog box, select a category.

   If you want to rename the selected category, you can click **Rename Directory**, type a new name, and click **OK**.

   The documents within the category are listed in the display area of the dialog box.
5. Select a document.
6. In the lower-right corner, click **Select**.

   Note that besides adding an existing document to the current job, you can also use the buttons at the bottom of the dialog box to:

   - Add new documents (**Add File**).
   - Delete a document (**Delete File**).
   - Move a document to another folder within the document index folder (**Move File**).
   - Rename a document (**Rename File**).

- Open a document (**Open File**).

The document is added to **Document Index** for the current job.

Open a document reference

Use the **Open File** command to open and view a document reference.

1. In the **Document Index - By Category**, select the document that you want to open.
2. Click **Open File**.

The selected document opens.

See also

Add document references for estimating jobs (page 40)

Modify a document reference (page 44)

Attach a document reference to an email (page 45)

Delete a document reference (page 45)

Modify a document reference

Use the **Edit Document Reference** command to modify the source and description of a document in **Document Index**.

1. In the **Document Index - By Category** dialog box, select the document that you want to modify.
2. Click **Edit Document Reference**.
3. In the **Document Reference Details** dialog box, click **Filename**.
4. In the **File Details** dialog box, modify the file source and description according to your needs.
5. Click **Save**.
6. To close the **File Details** dialog box, click the **Close** button (**X**) in the upper-right corner.
7. Modify the description according to your needs.

   Entering a description in the **Document Reference Details** dialog box will override the description that you entered in the **File Details** dialog box. This description will then appear in the **Description** column in the **Document Index - By Category** dialog box.
8. Click **Save**.
9. To close the **Document Reference Details** dialog box, click the **Close** button (**X**) in the upper-right corner.

See also

Add document references for estimating jobs (page 40)

Open a document reference (page 44)

Delete a document reference (page 45)

Attach a document reference to an email

Use the **Email File** command to create a new Microsoft Outlook email and send a document to the desired recipients via email.

1. In the **Document Index - By Category** dialog box, select the document that you want to send via email.
2. Click **Email File**.

   Microsoft Outlook opens. A new email with the selected document is created, with the selected document attached to it.
3. Add recipients and modify the text of the email.
4. Send the email.

See also

Add document references for estimating jobs (page 40)

Open a document reference (page 44)

Delete a document reference

Deleting a document reference from **Document Index** is permanent and cannot be undone. If you delete a document reference, you or any other Tekla EPM users will not be able to access the document reference or any documents, emails, or attachments that it contains, from **Document Index**.

1. In the **Document Index - By Category** dialog box, select the document reference that you want to delete.
2. Click **Delete Document Reference**.
3. To permanently delete the document reference, click **Yes** in the confirmation dialog box.

See also

Add document references for estimating jobs (page 40)

Modify a document reference (page 44)

Open a document reference (page 44)

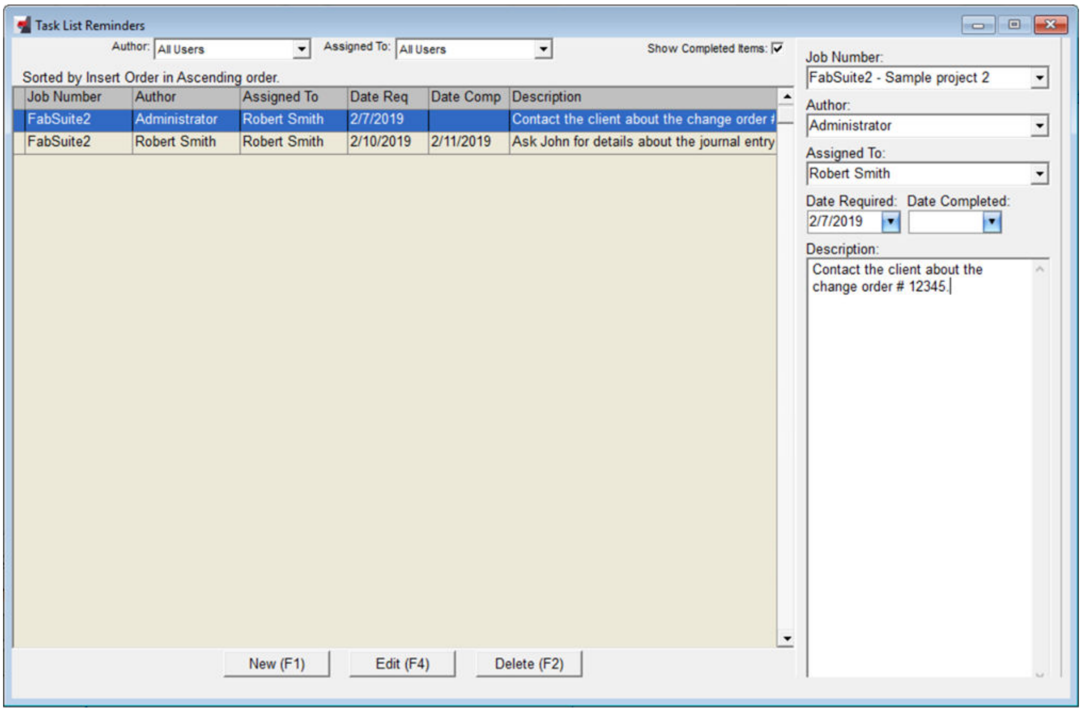
2.5 Manage and assign project tasks

In the **Task List Reminders** dialog box, you can view all existing tasks in the selected project and assign project tasks to Tekla EPM users. You can also manage the project tasks according to your needs: add new tasks, and modify or delete project tasks according to your needs. Check list items can also be moved to the task list and assigned to users.

To access the **Task List Reminders** dialog box, do the following:

1. In the **Select Project Management Job** dialog box, select the project.
2. In the lower-left corner of the dialog box, click **Task List Reminders**.

The **Task List Reminders** dialog box opens, displaying the existing project tasks.



To only show specific types of tasks, do any of the following:

- To only show the tasks created by a specific Tekla EPM user, click the arrow on the right side of the **Author** list and select a user in the list.
- To only show the tasks assigned to a specific Tekla EPM user, click the arrow on the right side of the **Assigned To** list and select a user in the list.
- To show both completed and not completed tasks, select the **Show Completed Items** check box.
- To only show tasks that are not completed, clear the **Show Completed Items** check box.

According to your needs, see any of the following sets of instructions.

Create a project task

1. Click **New**.
2. Click the arrow on the right side of **Job Number** list and select a project management job in the list.
3. Click the arrow on the right side of **Author** list and select the creator of the project task in the list.

   The list contains all Tekla EPM users in your company.
4. Click the arrow on the right side of **Assigned To** list and select the user to which you want to assign the task.

   The list contains all Tekla EPM users in your company.

   When a task has been assigned to a user, the **Task List Reminders** dialog box automatically opens when the user signs in to Tekla EPM. When the task is marked as completed, the **Task List Reminders** dialog box no longer opens when the user signs in.
5. Click the arrow on the right side of **Date Required** list, and select the deadline of the task in the calendar.
6. If necessary, click the arrow on the right side of the **Date Completed** list, and select the date when the task was completed.

   Tekla EPM records the date and time when each task is completed.
7. Type a description for the task.
8. Click **Add**.

Modify a project task

You might need to modify an existing task later. For example, you can assign the task to a different Tekla EPM user, or mark the task as completed.

1. In the list, select the project task that you want to modify.
2. Modify the job number, author, assignee, date required, date completed, and description according to your needs.
3. Click **Edit** to save the changes.

Delete a project task

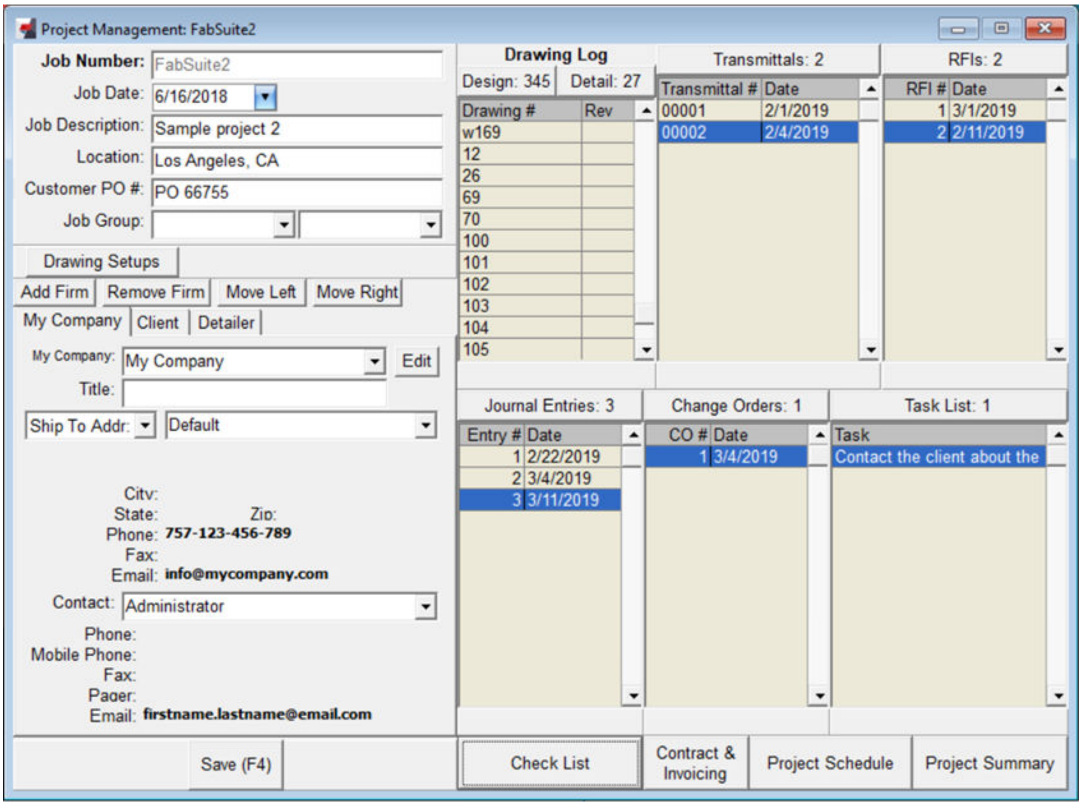
Note that deleting a project task is permanent and cannot be undone.

1. In the list, select the project task that you want to delete.
2. Click **Delete**.

3. To permanently delete the task, click **Yes** in the confirmation dialog box.

2.6 Manage companies in the project

To send project information to the other parties of the project, you need to add the parties to the project management job. Use the **Add Firm** command to add the companies to the project. You can also modify the existing companies, remove any unnecessary companies from the project, or move the company tabs left or right in the **Project Management** dialog box.



Add a company contact

1. On the left side of the **Project Management** dialog box, click **Add Firm**.
2. In the **Select** dialog box, select the appropriate firm type.
3. Click the arrow on the right side of uppermost list, and select the company that you want to add.

   Only companies added in **Address Book** with the same firm type can be selected in the list.
4. If necessary, change the company tab name by typing a new name in the **Title** field.

5. Select if you want to use the shipping or billing address of the company.
6. If the company has multiple shipping or billing addresses, select the appropriate one in the address list.
7. Click the arrow on the right side of **Contact** list, and select the contact person related to the project.
8. Click **Save**.

Modify a company

1. In the **Project Management** dialog box, click the firm tab that you want to modify.
2. Click the arrow on the right side of uppermost list, and select another company.

   Only companies added in **Address Book** with the same firm type can be selected in the list.
3. If necessary, change the company tab name by typing a new name in the **Title** field.
4. Select if you want to use the shipping or billing address of the company.
5. If the company has multiple shipping or billing addresses, select the appropriate one in the address list.
6. Click the arrow on the right side of **Contact** list, and select the contact person related to the project.
7. Click **Save**.

Move a company tab left or right

Note that the order of the company tabs affects the **Sold To** and **Ship To** options if you load information from the project management job to the related production control job.

1. In the **Project Management** dialog box, click the firm tab that you want to move.
2. Click the **Move Left** and **Move Right** to move the tab to the desired position.

Remove a company from the project

Removing a company from the project is permanent and cannot be undone. If you remove a company, you will no longer be able to send project documents to the company.

1. In the **Project Management** dialog box, click the tab of the firm that you want to remove.
2. Click **Remove Firm**.
3. To permanently remove the company from the project, click **Yes** in the confirmation dialog box.

2.7 Manage drawings

A project management job can contain two types of drawings: design drawings and detail drawings. Each of these two drawing types has their own drawing log where you can manage the drawings and their revisions. You can also search for and filter drawings, view or print drawings, create drawing reports, and so on.

For more information, see the following links:

Find a drawing (page 50)

Add, modify, and delete design drawings (page 51)

Add, modify, and delete detail drawings (page 53)

Create, modify, and delete drawing revisions (page 56)

Open a drawing (page 57)

Add a batch of drawings to a drawing log (page 57)

Copy the latest revisions of drawings to another location (page 59)

Modify multiple drawings (page 59)

Update the links to a drawing log (page 61)

Print drawings (page 61)

View the issue history of selected drawings (page 62)

View, print, or export drawing reports (page 62)

Find a drawing

Use the **Find Drawing** command to quickly find the desired drawing in the **Design Drawing Log** and **Detail Drawing Log** dialog boxes.

1. In either the **Design Drawing Log** dialog box or the **Detail Drawing Log** dialog box, click the **Drawing Log** ribbon tab.

2. In the menu, select **Find Drawing**.
3. In the **Enter Value** dialog box, start typing the drawing number in the field.

   Tekla EPM suggests drawings that start in the same way.
4. Press **Enter** to use the suggested drawing number.
5. Click **OK**.

Tekla EPM selects the related drawing in the current drawing log dialog box.

If the related drawing is in the drawing log dialog box that is not currently open, Tekla EPM opens that drawing log dialog box and selects the related drawing.

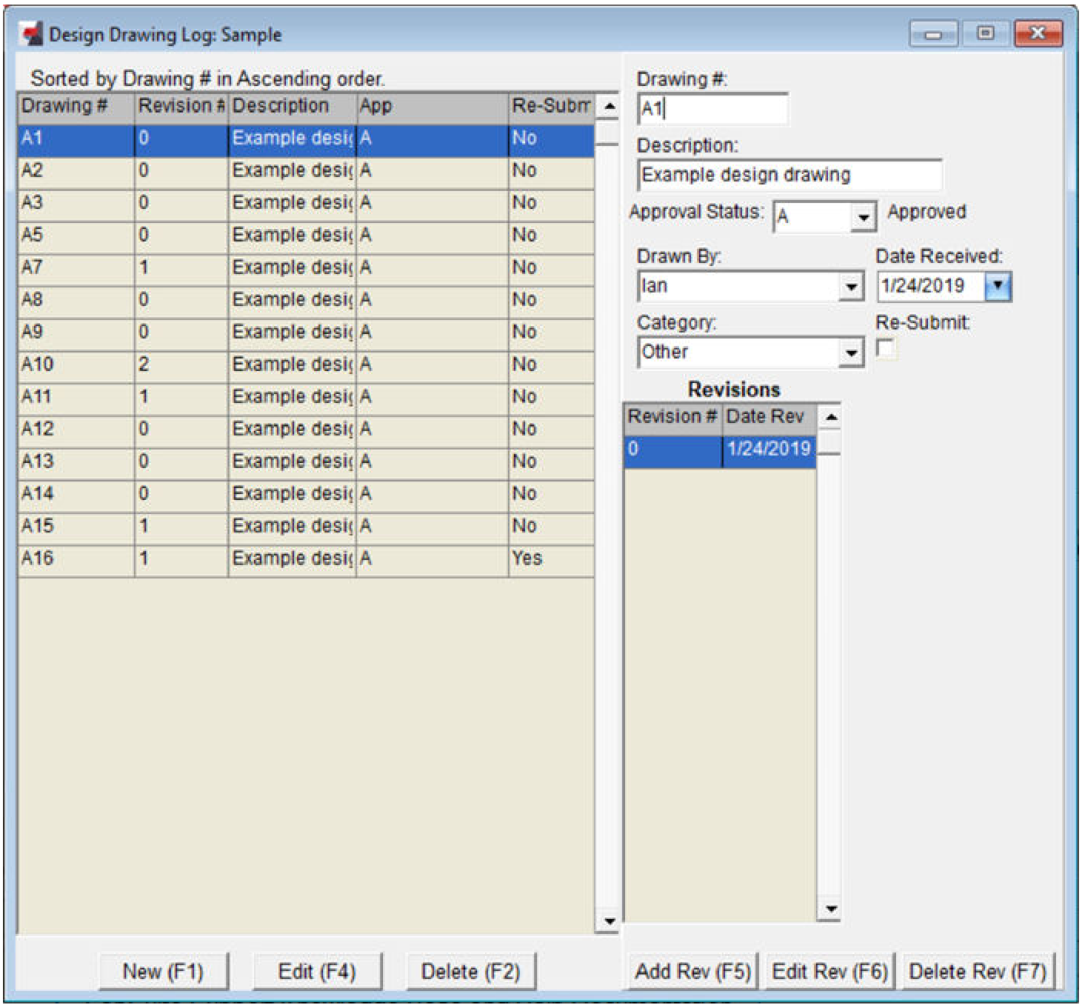
Add, modify, and delete design drawings

Use the **Design Drawing Log** dialog box to manage and save the project design drawings or any PDF files. You can add, modify, and delete design drawings, or view the files attached to the drawings. You can also attach design drawings to transmittals and send them to project parties.

To access the **Design Drawing Log**, do one the following:

- In the **Project Management** dialog box, click **Design** under the **Drawing Log** heading.

- In the **Project Management** dialog box, click the **Project Management** ribbon tab, and in the menu, select **Design Drawings**.



Add a design drawing

By following these instructions, you can add one drawing at a time. To add multiple drawings at one go and attach files to the drawings while adding them, see Add a batch of drawings to a drawing log (page 57).

Note that the available input fields in the **Design Drawing Log** dialog box depend on the set input fields. For more information, see .

1. Click **New**.

   The drawing number field is automatically populated with the next available number.

2. Modify the drawing number according to your needs.

3. Type a description for the item.

4. Click the arrow on the right side of **Approval Status** field and select an option in the list.

   The available approval statuses are set in **Approval Status Maintenance**.

5. Type a name in the **Drawn By** field.
6. Click the arrows on the right side of the **Drawing Date** and **Date Received** fields and select dates in the calendars.
7. To add the drawing into a category, do one of the following:
   - Type a new category in the **Category**.
   - Click the arrow on the right side of **Category** list and select a category in the list.

   For example, you can create categories for architectural or structural drawings. You can then use the drawing categories to filter the visible drawings in the **Design Drawing Log** dialog box.

8. To re-submit the drawings for approval, select the **Re-Submit** check box.
9. If necessary, enter the shop issue date, package number, and original release number.
10. Click **Add**.

The correct drawing file will automatically be attached to the drawing when it is added to the default drawing directory (by default, `C:\Users\Public\Documents\Tekla EPM\Drawing`) in the correct job folder and revision folder.

Modify a design drawing

1. In the list, select the drawing that you want to modify.
2. On the right side of the dialog box, modify the drawing properties according to your needs.
3. Click **Edit** to save the changes.

Delete a design drawing

Note that deleting a drawing is permanent and cannot be undone.

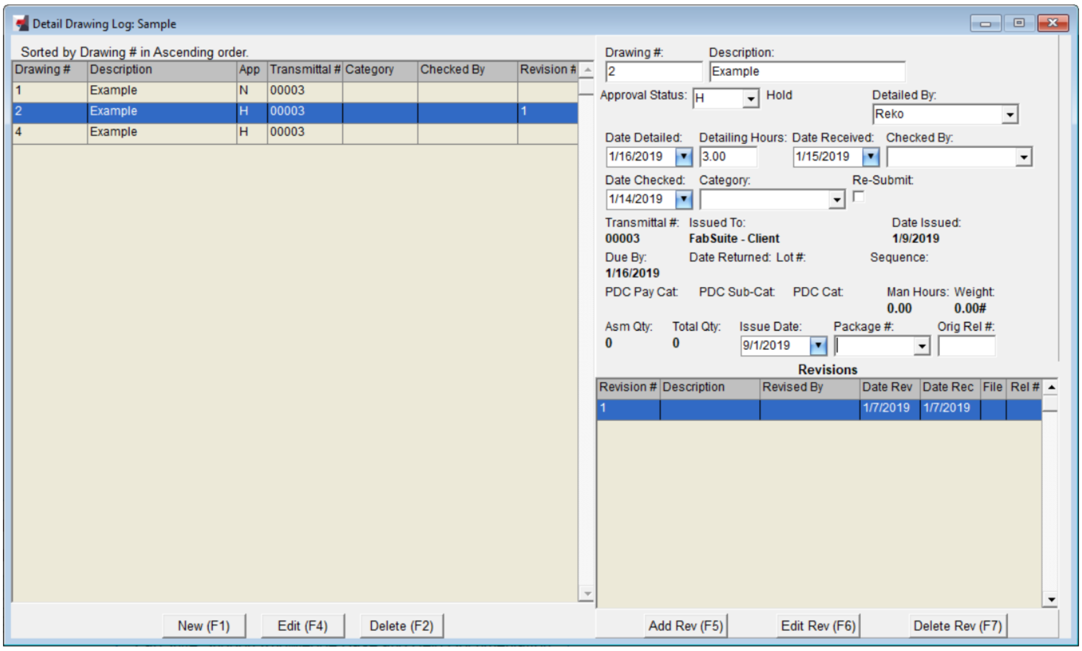
1. In the list, select the drawing that you want to delete.
2. Click **Delete**.
3. To permanently delete the drawing, click **Yes** in the confirmation dialog box.

Add, modify, and delete detail drawings

Use the **Detail Drawing Log** dialog box to manage and save the shop detail drawings. Drawings that are added to the **Detail Drawing Log** dialog box can be attached to transmittals. Any drawings that are attached to transmittals display the related transmittal information when they are selected.

To access the **Detail Drawing Log** dialog box, do one of the following:

- In the **Project Management** dialog box, click **Detail** under the **Drawing Log** heading.
- In the **Project Management** dialog box, click the **Project Management** ribbon tab, and in the menu, select **Detail Drawings**.



Add a detail drawing

By following these instructions, you can add one drawing at a time. To add multiple drawings at one go and manually attach files to them, see Add a batch of drawings to a drawing log (page 57).

Note that the available input fields in the **Detail Drawing Log** dialog box depend on the set input fields. For more information, see .

1. Click **New**.

   The drawing number field is automatically populated with the next available number.

2. Modify the drawing number according to your needs.
3. Type a description for the item.

4. Click the arrow on the right side of **Approval Status** field and select an option in the list.

   The available approval statuses are set in **Approval Status Maintenance**.
5. Type names in the **Detailed By** and **Checked By** fields.
6. Click the arrows on the right side of the **Date Detailed**, **Date Received**, and **Date Checked** fields and select dates in the calendars.
7. Type the detailing time in man hours in the **Detailing Hours** field.
8. To add the drawing into a category, do one of the following:
   - Type a new category in the **Category**.
   - Click the arrow on the right side of **Category** list and select a category in the list.

   For example, you can create drawing categories according to the item type, the shop release number, or the purpose of the revision. You can then use the drawing categories to filter the visible drawings in the **Detail Drawing Log** dialog box.
9. To re-submit the drawings for approval, select the **Re-Submit** check box.
10. If necessary, enter the shop issue date, package number, and original release number.
11. Click **Add**.

The correct drawing file will automatically be attached to the drawing when it is added to the default drawing directory (by default, `C:\Users\Public\Documents\Tekla EPM\Drawing`) in the correct job folder and revision folder.

Modify a detail drawing

1. In the list, select the drawing that you want to modify.
2. On the right side of the dialog box, modify the drawing properties according to your needs.
3. Click **Edit** to save the changes.

Delete a detail drawing

Note that deleting a drawing is permanent and cannot be undone.

1. In the list, select the drawing that you want to delete.
2. Click **Delete**.
3. To permanently delete the drawing, click **Yes** in the confirmation dialog box.

Create, modify, and delete drawing revisions

You can create, modify, and delete drawing revisions in either the **Design Drawing Log** or the **Detail Drawing Log**, depending on the drawing type whose revisions you want to manage.

Create a drawing revision

Note that these instructions only apply when you are adding a revision without any files attached to it. To add revisions with files attached, see Add a batch of drawings to a drawing log (page 57).

1. In the list, select the drawing for which you want to create a revision.
2. Click **Add Rev**
3. In the **Add Revision** dialog box, type the revision number and description.
4. Type appropriate names in the **Revised By** and **Checked By** fields.

   Note that the **Checked By** field is only available if you are creating a revision for a detail drawing.
5. Click the arrow on the right side of **Date Revised** and **Date Received** fields and select dates in the calendars.
6. Click the arrow on the right side of **Date Checked** field and select a date in the calendar.

   Note that the **Date Checked** field is only available if you are creating a revision for a detail drawing.
7. Type a release number for the revision.
8. Click **Save** to add the revision.

The new drawing revision is added to the **Revisions** list.

Note that since we did not attach a PDF file to the drawing revision, the **File** column is blank. If a PDF file has been attached to the drawing revision, the **File** column has an **F** in it, and you can double-click the **F** to view the attached PDF file.

The correct PDF file will automatically be attached to the revision when it is added to the default drawing directory (by default, `C:\Users\Public\Documents\Tekla EPM\Drawing`) in the correct job folder and revision folder.

Modify a drawing revision

Note that you can only modify one drawing revision for one drawing at a time.

1. In the **Revisions** list, select the revision that you want to modify.
2. Click **Edit Rev**.

3. In the **Edit Revision** dialog box, modify the revision properties according to your needs.
4. Click **Save** to save the changes.

Delete a drawing revision

Note that deleting a drawing revision is permanent and cannot be undone.

1. In the **Revisions** list, select the revision that you want to delete.
2. Click **Delete Rev**.
3. To permanently delete the selected revision, click **Yes** in the confirmation dialog box.

Open a drawing

Use the **Drawing Files** command to open and view a specific drawing in the drawing log. Note that only drawings that have files attached to them can be viewed.

1. In either the **Design Drawing Log** dialog box or the **Detail Drawing Log** dialog box, select the drawing that you want to open.
2. Do one of the following:
   - Double-click the drawing.
   - Click the **Drawing Log** ribbon tab, and in the menu, select **Drawing Files**.
3. If the file has multiple revisions, in the **Files** dialog box, click the arrows on the right side of the **Revision** list and select the revision that you want to open.

   Note that if you double-clicked a drawing to open it, the latest revision of the selected drawing is automatically opened.
4. Click **OK** to open the drawing.

Add a batch of drawings to a drawing log

You can add a batch of drawings at one go to either one of the drawing log dialog boxes. Use the **Batch Insert** command to add multiple drawings without attachments, or the **Batch Insert - From Files** command to add multiple drawings with PDF attachments.

Add drawings without PDF attachments

1. In either the **Design Drawing Log** dialog box or the **Detail Drawing Log** dialog box, click the **Drawing Log** ribbon tab.

2. In the menu, select **Batch Insert**.
3. In the **Batch Insert** dialog box, type a start number and end number to define the range of drawings that you are adding.
4. Define other properties for the drawings according to your needs.

   For more information on the available properties, see Add, modify, and delete design drawings (page 51) and Add, modify, and delete detail drawings (page 53).
5. Click **Add**.

The drawings are added to the drawing log.

Add drawings with PDF attachments

1. In either the **Design Drawing Log** dialog box or the **Detail Drawing Log** dialog box, click the **Drawing Log** ribbon tab.
2. In the menu, select **Batch Insert - From Files**.
3. In the **File Insert** dialog box, click the **Directory** button.
4. In the **Browse For Folder** dialog box, select the folder from which you want to import the attachments.
5. Click **OK**.
6. At the top of the **File Insert** dialog box, select one of the following options:
   - **Add Drawing**: adds a new drawing to the drawing log.
   - **Add Revision**: adds a drawing revision for the drawing that is currently selected in the drawing log.
7. If you are adding a revision, type the revision number in the **Add Revision** field.
8. To save copies of the drawings in the `\Tekla EPM Documents\Drawing` folder, select the **Copy Files into Drawing Directory** check box.

   By copying the drawings to the `\Tekla EPM Documents\Drawing` folder, you can ensure that Tekla EPM always finds the attached files, even if you change their location on your computer.
9. To ensure that only the correct drawing files in the selected folder are imported to Tekla EPM, define a drawing prefix or a drawing suffix.

   The prefix and suffix must match the drawing file names exactly, so that Tekla EPM can import the correct files.
10. Modify other properties for the drawings according to your needs.

11. Click **Add** to add the drawings to the drawing log.

The drawings and their attachments are added to the drawing log. Notice that an `F` appears in the **File** column for each drawing, indicating that the drawings have PDF files attached to them.

Copy the latest revisions of drawings to another location

Use the **Copy Latest Revision Drawing Files** command to copy the latest revisions of drawings to another location, so that they can be issued to the shop of field or be printed.

1. In either the **Design Drawing Log** dialog box or the **Detail Drawing Log** dialog box, click the **Drawing Log** ribbon tab.
2. In the menu, select **Copy Latest Revision Drawing Files**.
3. In the **Copy Latest Revision Drawing Files** dialog box, select the drawings that you want to copy to anotherr location.

   The options are:

   - **Selected Drawings**: copies the latest revisions of the drawings that are selected in the drawing log.
   - **All Design Drawings**: copies the latest revisions of all drawings in the **Detail Drawing Log** dialog box.
   - **All Detail Drawings**: icopies the latest revisions of all drawings in the **Detail Drawing Log** dialog box.
   - **All Design & Detail Drawings**: copies the latest revisions of all drawings in the **Detail Drawing Log** and **Detail Drawing Log** dialog boxes.
4. Click the **Directory** button.
5. In the **Browse For Folder** dialog box, select the folder to which you want to copy the revisions.
6. Click **OK**.
7. To copy the revisions to the selected location, click **OK** at the bottom of the **Copy Latest Revision Drawing Files** dialog box.

   The `File_List` text file opens in Microsoft Notepad, showing the drawings that were copied to the selected location.
8. Ensure that all necessary drawings are listed in the `File_List` text file.
9. To close Microsoft Notepad and return to the drawing log, click the **Close** button (**X**) in the upper-right corner.

Modify multiple drawings

You can modify the properties of multiple drawings at one go. Use the **Global Edit** command to modify all or specific types of drawings, or the **Global Edit Selected** command to modify the drawings that are selected in the drawing log.

Modify all or specific types of drawings

1. In either the **Design Drawing Log** dialog box or the **Detail Drawing Log** dialog box, click the **Drawing Log** ribbon tab.
2. In the menu, select **Global Edit**.
3. To only modify specific types of drawings, in the **Drawing Log Global Edit Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
4. In the **Filter** dialog box, do one of the following depending on the filter type:
   - Click the arrow buttons to move the drawings that you want to modify to the **Included** list.
   - Type the maximum and minimum values for the drawings that you want to modify.

     For example, define the earliest and latest revision date for the drawings.
5. Click **OK** to apply the filter.

   To further limit the drawing types that you want to modify, repeat steps 3 to 5 for all necessary filter types.
6. At the bottom of the **Drawing Log Global Edit Filters** dialog box, click **OK**.
7. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.
8. Modify any properties in the **Global Edit** dialog box according to your needs.

   For example, change the approval status, or select another drawing date.
9. Click **OK**.
10. To confirm the changes that you made, click **Yes** in the confirmation dialog box.

The modified drawing properties are updated to the drawing log.

Modify the selected drawings

1. In either the **Design Drawing Log** dialog box or the **Detail Drawing Log** dialog box, select the drawings that you want to modify.

To select multiple drawings, hold down **Ctrl**.

To select a range of subsequent drawings, hold down **Shift**.

2. Click the **Drawing Log** ribbon tab.
3. In the menu, select **Global Edit Selected**.
4. In the **Global Edit** dialog box, select check boxes next to the properties that you want to update.
5. Modify any properties in the **Global Edit** dialog box according to your needs.

   For example, change the approval status or select another drawing date.
6. Click **OK**.

The modified drawing properties are updated to the drawing log.

Update the links to a drawing log

Use the **Refresh** command to update the links to the drawing log. If you have recently attached files to drawings manually, you can also use the **Refresh** command to see the newly attached files in the drawing log. The attached files are also updated when you close and re-open the drawing log dialog box.

1. In either the **Design Drawing Log** dialog box or the **Detail Drawing Log** dialog box, click the **Drawing Log** ribbon tab.
2. In the menu, select **Refresh**.

Any changes made in the drawing log are updated to the project management job.

Print drawings

Use the **Print Drawings - Selected** command to print one or multiple drawings in either the **Design Drawing Log** dialog box or the **Design Drawing Log** dialog box.

1. In either the **Design Drawing Log** dialog box or the **Detail Drawing Log** dialog box, select the drawings that you want to print.

   To select multiple drawings, hold down **Ctrl**.

   To select a range of subsequent drawings, hold down **Shift**.
2. Click the **Drawing Log** ribbon tab.
3. In the menu, select **Print Drawings - Selected**.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.
6. In the **Enter Value** dialog box, type the number of the printed copies.

7. Click **OK** to print the drawings.

View the issue history of selected drawings

Use the **Issue History - Selected** comment to view the entire activity history of the selected drawings in either the **Design Drawing Log** dialog box or the **Detail Drawing Log** dialog box. Among other things, the issue history shows the transmittals in which the drawings are included.

1. In either the **Design Drawing Log** dialog box or the **Detail Drawing Log** dialog box, select the drawings whose issue history you want to view.
2. Click the **Drawing Log** ribbon tab.
3. In the menu, select **Issue History - Selected**.
4. In the **Issue History** dialog box, view the activity of the selected drawings.
5. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

View, print, or export drawing reports

You can create reports based on the information in the drawing log dialog boxes. For example, you can create a drawing list, or a report on the drawing issue history. You can then view, print, or export the created reports. Use the **Reports** command to create a report on all drawings in the drawing log or on the drawings that match specific filters, or use the **Reports - Selected** command to create a report on the drawings that you select in the drawing log.

Create a drawing report

1. In either the **Design Drawing Log** dialog box or the **Detail Drawing Log** dialog box, do one of the following:

To	Do this
Create reports on all drawings or on specific drawing types	a. Click the **Drawing Log** ribbon tab. b. In the menu, select **Reports**. c. To only create drawing reports, at the bottom of the **Project Management Report Filters** dialog box, ensure that only the **Drawings** check box is selected. d. To only include specific types of drawings in the reports, in the **Project Management Report Filters** dialog box, select a filter type in the **Type** list, and click **Select**.

To	Do this
	e. In the **Filter** dialog box, do one of the following depending on the filter type: • Click the arrow buttons to move the drawing properties that you want to include in the report to the **Included** list. • Type the maximum and minimum values for the drawings that you want to include. f. Click **OK**. To further limit the types of drawings that are included in the reports, repeat steps b to d for all necessary filter types. g. Click **Make Report**.
Create reports on the currently selected drawings	a. In either the **Design Drawing Log** dialog box or the **Detail Drawing Log** dialog box, select the drawings that you want to include in the reports. To select multiple items, hold down **Ctrl**. To select a range of subsequent drawings, hold down **Shift**. b. Click the **Drawing Log** ribbon tab. c. In the menu, select **Reports - Selected**.

2. In the **Report Selection** dialog box, select the report that you want to view, print, or export.

View the drawing report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the drawing report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the drawing report

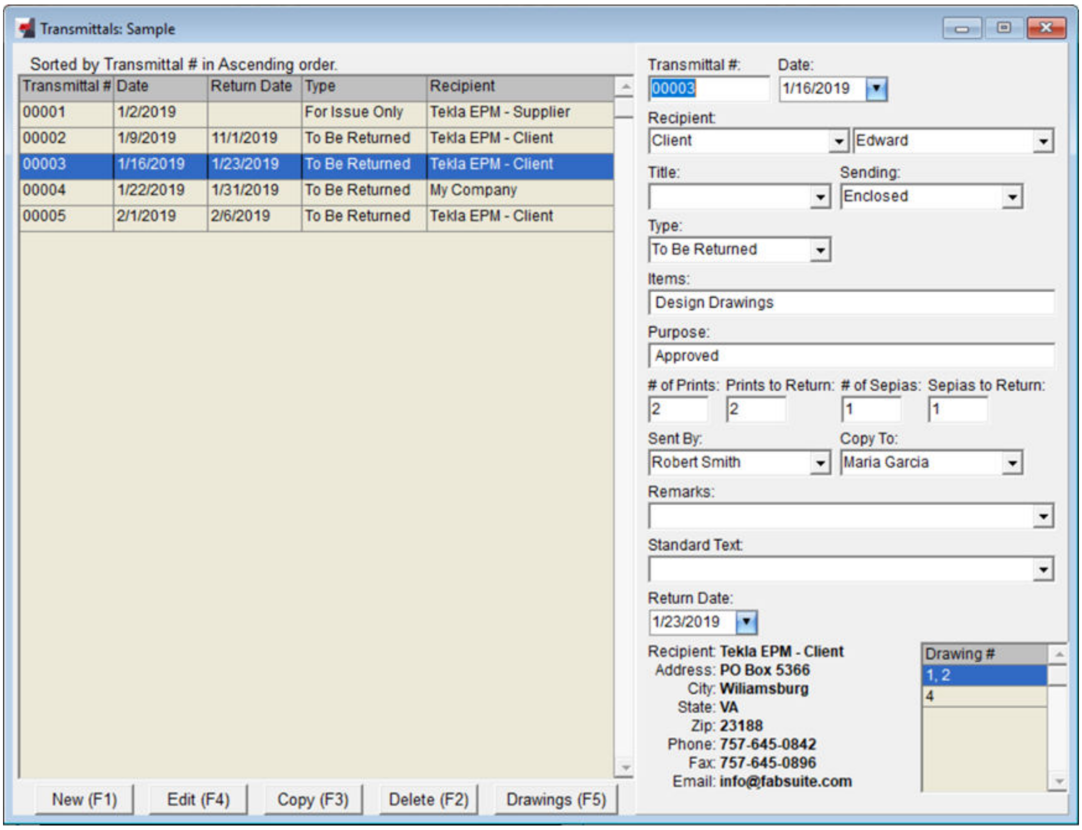
1. Click **Export**.
2. In the **Export Format** list, select an export format.
3. Click **Browse**.
4. Browse to the location where you want to save the exported file, and click **Save**.
5. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
6. If you want to open the file after exporting it, select the **Open Exported Document** check box.
7. Click **Export**.

2.8 Manage transmittals

Transmittals are cover sheets to which drawings can be attached in order to be sent. Tekla EPM records the time when a drawing has been issued and is to be returned, and marks drawings that are overdue or outstanding. You can manage the transmittals related to the current project management project in the **Transmittals** dialog box:

- In the **Project Management** dialog box, do either of the following:
  - At the top of the dialog box, click the **Transmittals** button.
  - Click the **Project Management** ribbon tab, and in the menu, select **Transmittals**.

The **Transmittals** dialog box opens.



For more information, see the following links:

Create, modify, and delete transmittals (page 65)

View transmittals (page 73)

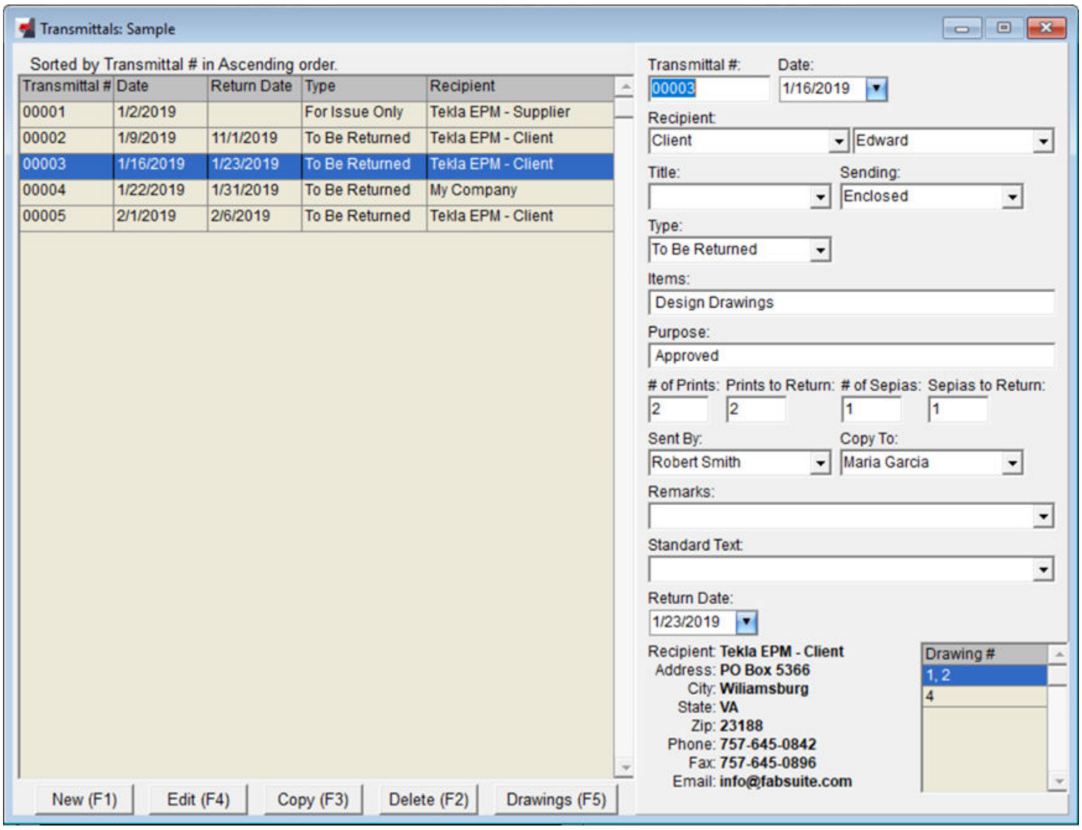
Print transmittals (page 73)

Mark drawings in a transmittal as received (page 74)

Send a transmittal via email (page 75)

Create, modify, and delete transmittals

Use the **Transmittals** dialog box to manage transmittals. You can create new transmittals, attach drawings to transmittals, modify the properties of existing transmittals, or delete unnecessary transmittals.



Create a transmittal

1. At the bottom of the **Transmittals** dialog box, click **New**.

   The next available transmittal number is populated in the **Transmittal #** field.

2. If necessary, modify the transmittal number.
3. Define the properties for the transmittal.

   The items that are marked with an asterisk (*) in the following table are mandatory information.

Option	Description
Date *	The date of the transmittal. Click the arrow on the right side of the **Date** field, and select the date in the calendar.
Recipient *	The company and contact person that will receive the transmittal once it is ready. Note that the available companies and contact persons are set in the **Project Company Standards** dialog box. For more information, see

Option	Description
	Define company standard settings for Project Management (page 8). Click the arrow on the right side of the leftmost **Recipient** list, and select the recipient company in the list.
Title *	The title that will appear at the top of the transmittal. In the **Title** field, type a title for the transmittal.
Sending *	Allows you to define how the drawings are sent to the recipient. Click the arrow on the right side of the **Sending** list, and select one of the following options: • **Enclosed**: the drawings are sent enclosed in the transmittal. • **Under Separate Cover**: the drawings are sent under a separate cover.
Type *	Allows you to define if the recipient needs to return the drawings. Click the arrow on the right side of the **Type** list, and select one of the following options: a. **To Be Returned**: the recipient needs to return the drawings by a specific date. b. **For Issue Only**: the recipient does not need to return the drawings.
Items *	The types of the items that are sent with a transmittal. If necessary, you can select multiple options. The options are set in the **Transmittal Item Maintenance** dialog box. For more information, see Create, modify, and delete transmittal items (page 27). To add items to the transmittal, do the following: a. Click the **Items** field. b. In the **Select Items** dialog box, click the arrow buttons to move the types of items to be included in the transmittal to the **Included** list. c. Click **OK**.
Purpose *	The purposes of sending the transmittal. For example, transmittals can be sent to be approved

Option	Description
	or for pricing. If necessary, you can select multiple purposes. The options are set in the **Transmittal Purpose Maintenance** dialog box. For more information, see Create, modify, and delete transmittal purposes (page 28). The **Select Purposes** dialog box opens automatically when you click **OK** in the **Select Items** dialog box. In the dialog box, do the following: a. Click the arrow buttons to move the purposes for sending the transmittal to the **Included** list. b. Click **OK**.
# of Prints	The number of prints included in the transmittal. Type a number in the **# of Prints** field.
Prints to Return	If **Type** is set to **To Be Returned**, allows you to define the number of prints to be returned. Type a number in the **Prints to Return** field.
# of Sepias	The number of prints included in the transmittal. Type a number in the **# of Sepias** field.
Sepias to Return	If **Type** is set to **To Be Returned**, allows you to define the number of sepias to be returned. Type a number in the **Sepias to Return** field.
Sent By	The sender of the transmittal. Do one of the following: • Click the arrow on the right side of the **Sent By** list, and select a previously defined sender in the list. • Type a new sender name in the **Sent By** field. The name is saved and will be available for future transmittals.
Copy To	The people who receive a copy of the transmittal. Do one of the following: • Click the arrow on the right side of the **Copy To** list, and select a previously defined name in the list.

Option	Description
	• Type a new name in the **Sent By** field. The name is saved and will be available for future transmittals.
Remarks	Any remarks that you want to add to the transmittal. Type the remarks in the **Remarks** field.
Standard Text	The text items that you want to include in the transmittal. You can only select one option. The text items are set in the **Transmittal Standard Text Maintenance** dialog box. For more information, see Create, modify, and delete commonly used text items for transmittals (page 29). Click the arrow on the right side of the **Standard Text** list, and select an option in the list.
Return Date *	If **Type** is set to **To Be Returned**, allows you to define the date by which the drawings should be returned. Remember to add a return date for returned drawings, so that they do not appear as overdue. Click the arrow on the right side of the **Return Date** field, and select a date in the list.

4. Click **Add**.
5. To attach drawings to the new transmittal, do the following:
   a. At the bottom of the dialog box, click **Drawings**.
   b. In the **Selected Drawings** dialog box, click the arrow buttons to move the drawings that you want to attach to the transmittal to the **Included** list.
   c. Click **OK**.

   You can see the attached drawings in the lower-right corner of the **Transmittals** dialog box.

Modify a transmittal

Modify a transmittal to change its properties. For example, you should add a return date for returned drawings, so that they do not appear as overdue.

1. In the **Transmittals** dialog box, select the transmittal that you want to modify.
2. Modify the properties for the transmittal.

The items that are marked with an asterisk (*) in the following table are mandatory information.

Option	Description
Date *	The date of the transmittal. Click the arrow on the right side of the **Date** field, and select the date in the calendar.
Recipient *	The company and contact person that will receive the transmittal once it is ready. Note that only the companies that have been added for the project in the **Project Management** dialog box and their contact persons are available in the **Recipient** lists. Click the arrow on the right side of the leftmost **Recipient** list, and select the recipient company in the list. Click the arrow on the right side of the rightmost **Recipient** list, and select the contact person in the list.
Title *	The title that will appear at the top of the transmittal. In the **Title** field, type a title for the transmittal.
Sending *	Allows you to define how the drawings are sent to the recipient. Click the arrow on the right side of the **Sending** list, and select one of the following options: • **Enclosed**: the drawings are sent enclosed in the transmittal. • **Under Separate Cover**: the drawings are sent under a separate cover.
Type *	Allows you to define if the recipient needs to return the drawings. Click the arrow on the right side of the **Type** list, and select one of the following options: a. **To Be Returned**: the recipient needs to return the drawings by a specific date. b. **For Issue Only**: the recipient does not need to return the drawings.
Items *	The types of the items that are sent with a transmittal. You can select multiple options. The options are set in the **Transmittal Item Maintenance** dialog box. For more information,

Option	Description
	see Create, modify, and delete transmittal items (page 27). To add items to the transmittal, do the following: a. Click the **Items** field. b. In the **Select Items** dialog box, click the arrow buttons to move the types of items to be included in the transmittal to the **Included** list. c. Click **OK**.
Purpose	The purposes of sending the transmittal. For example, transmittals can be sent to be approved or for pricing. If necessary, you can select multiple purposes. The options are set in the **Transmittal Purpose Maintenance** dialog box. For more information, see Create, modify, and delete transmittal purposes (page 28). The **Select Purposes** dialog box opens automatically when you click **OK** in the **Select Items** dialog box. In the dialog box, do the following: a. Click the arrow buttons to move the purposes for sending the transmittal to the **Included** list. b. Click **OK**.
# of Prints	The number of prints included in the transmittal. Type a number in the **# of Prints** field.
Prints to Return	If **Type** is set to **To Be Returned**, allows you to define the number of prints to be returned. Type a number in the **Prints to Return** field.
# of Sepias	The number of prints included in the transmittal. Type a number in the **# of Sepias** field.
Sepias to Return	If **Type** is set to **To Be Returned**, allows you to define the number of sepias to be returned. Type a number in the **Sepias to Return** field.
Sent By	The sender of the transmittal. Do one of the following: • Click the arrow on the right side of the **Sent By** list, and select a previously defined sender in the list.

Option	Description
	• Type a new sender name in the **Sent By** field. The name is saved and will be available for future transmittals.
Copy To	The people who receive a copy of the transmittal. Do one of the following: • Click the arrow on the right side of the **Copy To** list, and select a previously defined name in the list. • Type a new name in the **Sent By** field. The name is saved and will be available for future transmittals.
Remarks	Any remarks that you want to add to the transmittal. Type the remarks in the **Remarks** field.
Standard Text	The text items that you want to include in the transmittal. You can only select one option. The text items are set in the **Transmittal Standard Text Maintenance** dialog box. For more information, see Create, modify, and delete commonly used text items for transmittals (page 29). Click the arrow on the right side of the **Standard Text** list, and select an option in the list.
Return Date *	If **Type** is set to **To Be Returned**, allows you to define the date by which the drawings should be returned. Remember to add a return date for returned drawings, so that they do not appear as overdue. Click the arrow on the right side of the **Return Date** field, and select a date in the calendar.

3. To change which drawings are attached to the transmittal, do the following:
    a. At the bottom of the dialog box, click **Drawings**.
    b. In the **Selected Drawings** dialog box, click the arrow buttons to move the drawings that you want to attach to the transmittal to the **Included** list.
    c. Click **OK**.
4. Click **Edit** to save the changes.

Delete transmittals

1. In the **Transmittals** dialog box, select the transmittals that you want to delete.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.

2. Click **Delete**.
3. To permanently delete the transmittals, click **Yes** in the confirmation dialog box.

View transmittals

Use the **View Selected Transmittals** command to view the selected transmittals in the **Tekla EPM Report Viewer**.

1. In the **Transmittals** dialog box, select the transmittals that you want to view.

   To select multiple transmittals, hold down **Ctrl**.

   To select a range of subsequent transmittals, hold down **Shift**.

2. Click the **Transmittal** ribbon tab.
3. In the menu, select **View Selected Transmittals**.
4. In the **View Transmittal** dialog box, select or clear the following check boxes according to your needs:

To	Do this
Show Company Logo (If Exists)	When selected, your company logo is visible in the transmittal.
Combine Drawings	When selected, consecutive drawing numbers are combined, so that the drawing numbers are displayed as 1 – 3, instead of 1, 2, 3. To be combined, the drawings need to have the same dates, revisions, and descriptions, and be in a series.

5. Click **View**.

The transmittal opens in the **Tekla EPM Report Viewer**.

In the **Tekla EPM Report Viewer**, you can email the transmittal as a Microsoft Excel worksheet or a PDF file, export it to another file format, or print it.

Print transmittals

Use the **Print Selected Transmittals** to print one or multiple transmittals related to the current project management job.

1. In the **Transmittals** dialog box, select the transmittals that you want to print.

   To select multiple transmittals, hold down **Ctrl**.

   To select a range of subsequent transmittals, hold down **Shift**.
2. Click the **Transmittal** ribbon tab.
3. In the menu, select **Print Selected Transmittals**.
4. In the **Print Transmittal** dialog box, select or clear the following check boxes according to your needs:

To	Do this
Show Company Logo (If Exists)	When selected, your company logo is visible in the transmittal.
Combine Drawings	When selected, consecutive drawing numbers are combined, so that the drawing numbers are displayed as 1 – 3, instead of 1, 2, 3. To be combined, the drawings need to have the same dates, revisions, and descriptions, and be in a series.

5. In the **Copies** field, type the number of printed copies.
6. Click **Change Printer**.
7. In the **Select Printer** dialog box, click a printer to select it.
8. Click **OK**.

Mark drawings in a transmittal as received

When the recipient of the transmittal has returned the drawings, you should mark the drawings as received in the **Transmittals** dialog box.

Note that you can only receive drawings in transmittals whose type is **To Be Returned**.

1. In the **Transmittals** dialog box, click the transmittal whose drawings you want to receive.
2. At the bottom of the dialog box, click **Drawings**.
3. In the **Selected Drawings** dialog box, click the arrow buttons to move the returned drawings to the **Included** list.
4. Click **Receive**.

5. In the **Receive Drawings** dialog box, click the arrow on the right side of the **Date Returned** field, and select the date in the calendar.
6. Click the arrow on the right side of **Approval Status** list, and select the approval status of the drawings in the list.
7. If the drawings have been re-submitted for approval, select the **Re-Submit** check box.
8. Click **OK**.
9. In the **Selected Drawings** dialog box, select all drawings in the **Included** list.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.
10. Click **Set Shop Issue Date of Included Drawings**.
11. Click the arrow on the right side of the date field, and select a date in the calendar.
12. Click **OK**.
13. To close the **Selected Drawings** dialog box, click **OK**.

Send a transmittal via email

Use the **Email Selected Transmittal** command to send the selected transmittals via email directly from the **Transmittals** dialog box.

Note that the **Email Selected Transmittal** command only works with Microsoft Outlook, so you need to have Microsoft Outlook open before trying to send a transmittal by email.

1. In the **Transmittals** dialog box, select the transmittals that you want to send via email.
2. Click the **Transmittal** ribbon tab.
3. In the menu, select **Email Selected Transmittal**.

   The **Email Transmittal** dialog box opens.

   Note that the people who were marked as recipients of the transmittal are automatically included in the **Recipients Included** list.
4. In the **Email Transmittal** dialog box, click the arrow buttons to move additional recipients to the **Recipients Included** list.
5. If some of the recipients do not have an email address saved in the **Address Book**, do the following:
   a. Select the recipient in the **Recipients Included** list.
   b. Type the email address in the **Email Address** field.

c. Click **Set Email Address**.

d. In the confirmation dialog box, select if you want to save the email address for the contact in the **Address Book**.

6. Select or clear the following check boxes according to your needs:

Option	Description
Attach Drawing Files	When selected, the drawing files that match the items and purposes defined in the **Transmittals** dialog box are attached to the transmittal.
Compress Drawing Files	When selected, the drawing files are compressed into .zip package. The drawings are still separate PDF files within the .zip package. Note that the size of a .zip package may prevent Microsoft Outlook from sending the transmittal via email.
Attach PDF export of the Transmittal	When selected, a PDF version of the transmittal document is attached to the email.
Show Company Logo (If Exists)	When selected, your company logo is visible in the transmittal. Note that the **Show Company Logo (If Exists)** check box is only available if you have selected the **Attach PDF export of the Transmittal** check box.
Combine Drawings	When selected, consecutive drawing numbers are combined, so that the drawing numbers are displayed as 1 – 3, instead of 1, 2, 3. Note that the **Combine Drawings** check box is only available if you have selected the **Attach PDF export of the Transmittal** check box.

7. Click **Email** to send the email.

View, print, and export transmittal reports

You can create reports based on the transmittals related to the current project. For example, you can create a report containing all existing transmittals or all overdue transmittals. You can then view, print, or export the created reports. Use the **Reports** command to create a report on all transmittals or transmittals that match specific filters, or use the **Reports - Selected** command to create a report on the transmittals that are currently selected in the **Transmittals** dialog box.

Create a transmittal report

1. In the **Transmittals** dialog box, click the **Transmittal** ribbon tab.

2. Do either of the following:

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td>Create reports on all transmittals or specific types of transmittals</td><td>a. In the menu, select Reports.
b. To only create transmittal reports, at the bottom of the Project Management Report Filters dialog box, ensure that the Transmittals check box is selected.
c. To only include specific types of transmittals in the reports, in the Project Management Report Filters dialog box, select a filter type in the Type list, and click Select.
d. In the Filter dialog box, do one of the following depending on the filter type:
• Click the arrow buttons to move the transmittal properties that you want to include in the report to the Included list.
• Type the maximum and minimum values for the transmittals that you want to include.
For example, select the earliest and latest drawing date for the transmittals.
e. Click OK.
To further limit the transmittals that are included in the reports, repeat steps b to d for all necessary filter types.
f. To combine the drawing numbers of drawings with the same dates, revisions, and descriptions, select the Transmittal - Combine Drawings check box.
g. Click Make Report.</td></tr>
<tr><td>Create reports on the currently selected transmittals</td><td>a. In the menu, select Reports - Selected.</td></tr>
</table>

3. In the **Report Selection** dialog box, select the report that you want to view, print, or export.

View the transmittal report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the transmittal report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the transmittal report

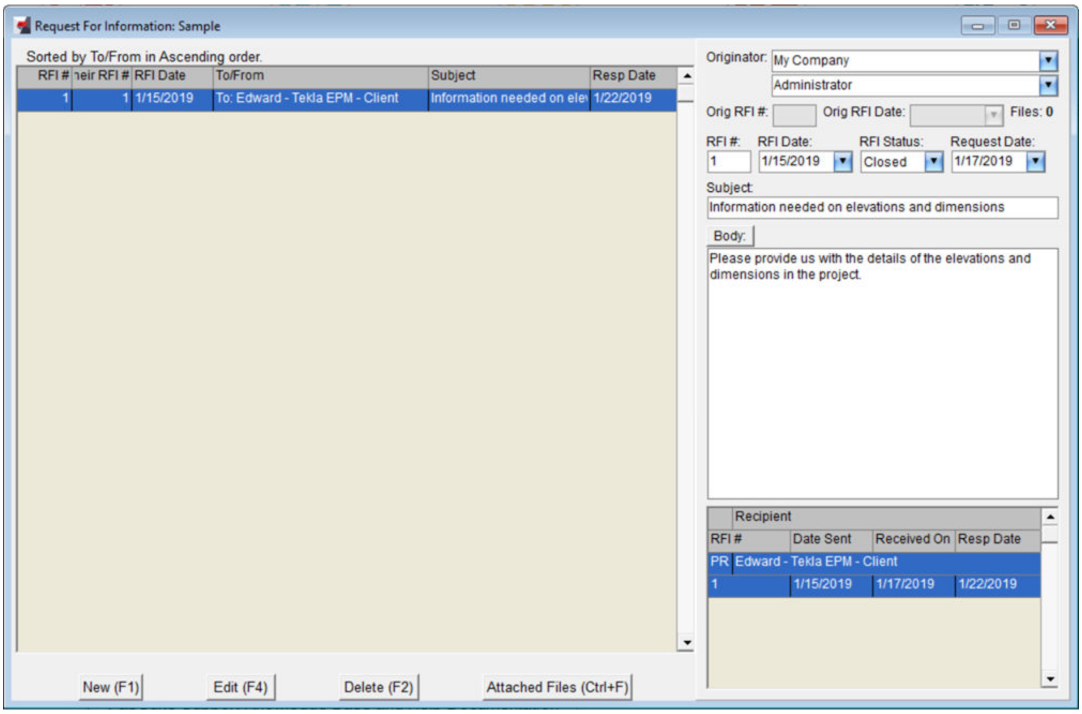
1. Click **Export**.
2. In the **Export Format** list, select an export format.
3. Click **Browse**.
4. Browse to the location where you want to save the exported file, and click **Save**.
5. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
6. If you want to open the file after exporting it, select the **Open Exported Document** check box.
7. Click **Export**.

2.9 Manage requests for information

Official requests for information, or RFIs, allow you to log the flow of information between parties in the construction project. RFIs can be used to clarify the design intent, get missing information, receive approval for alternate methods or materials, get approved fixes for any conflicts in the field, and get any other critical information to ensure that the project conforms to the intent of the design team. You can save all RFIs and their responses to Tekla EPM, so that everyone in the current project can keep track of the project quickly and easily.

- In the **Project Management** dialog box, do either of the following:
  - In the upper-right corner of the dialog box, click the **RFIs** button.
  - Click the **Project Management** ribbon tab, and in the menu, select **RFIs**.

The **Request For Information** dialog box opens.



For more information, see the following links:

Create, modify, and delete requests for information (page 79)

View requests for information (page 88)

Print requests for information (page 88)

Import or export requests for information (page 89)

Save a request for information as a Microsoft Word document (page 90)

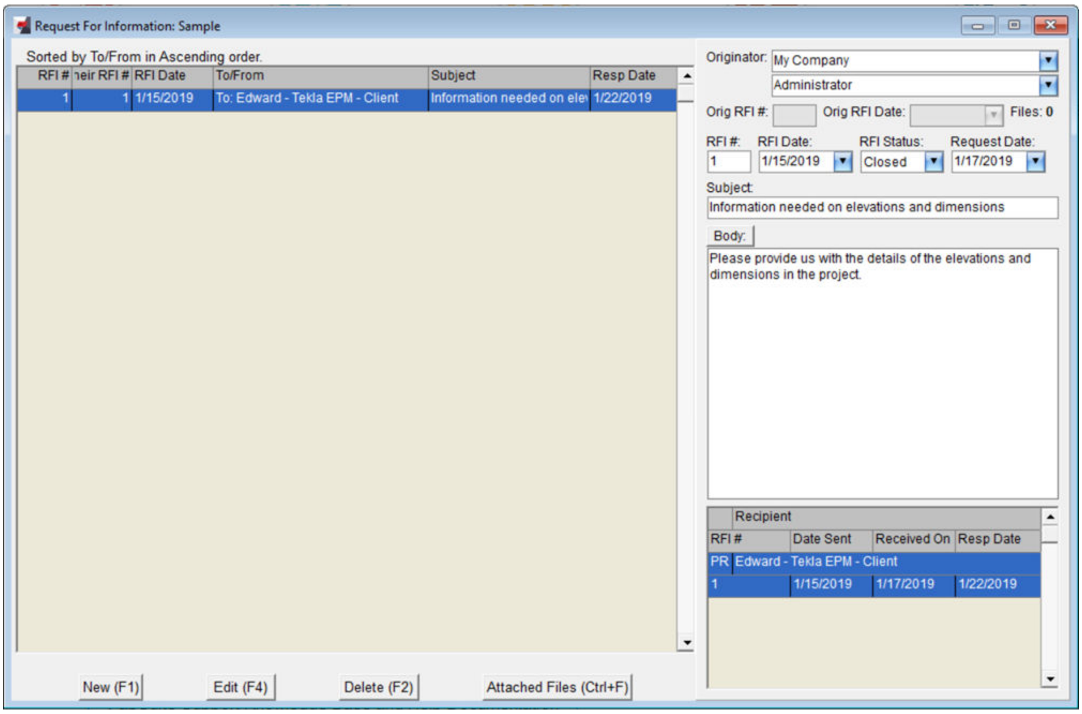
Send a request for information via email (page 90)

View, print, or export RFI reports (page 92)

Create, modify, and delete requests for information

Use the **Request For Information** dialog box to manage requests for information, or RFIs. You can create new requests, add recipients for the requests, attach files or emails to requests, modify the properties of existing requests, or delete unnecessary requests.

Note that requests by either your company or any other party in the project can be recorded in the **Request For Information** dialog box.



Create a request

1. In the **Request For Information** dialog box, click **New**.
2. Define the properties of the request.

   The items that are marked with an asterisk (*) in the following table are mandatory information.

Option	Description
Originator *	The party that initiated the original request. Click the arrow on the right side of the upper **Originator** list, and in the list, select the originator company. Click the arrow on the right side of the lower **Originator** list, and in the list, select the contact person that initiated the request. Note that only the companies that have been added for the project in the **Project Management** dialog box

Option	Description
	and their contact persons are available in the **Originator** lists.
Orig RFI # *	The number of the original request that was sent to your company. Note that the **Orig RFI #** is only available and mandatory if the originator of the request is some other party than your company. Type the request number in the **Orig RFI #** field.
Orig RFI Date *	The date when the original request was sent to your company. Note that the **Orig RFI Date** is only available and mandatory if the originator of the request is some other party than your company. Click the arrow on the right side of the **Orig RFI Date** list, and select a date in the calendar.
RFI # *	The number of the request or response that you are sending. Note that an RFI number can only be used once. Type the request number in the **RFI #** field.
RFI Date *	The date when you sent the request. Click the arrow on the right side of the **RFI Date** list, and select a date in the calendar.
RFI Status	Indicates if all necessary information regarding the request has been received. Remember to close requisitions once they have been responded to. Click the arrow on the right side of **RFI Status** list, and select one of the following options: • **Open**: all necessary information has not been received. • **Closed**: all necessary information has been received.

Option	Description
	NOTE Setting the RFI status as **Closed** does not close the request, so the request can still be shown as overdue. To actually close the request, you need to define a response date when you have received all necessary information from the primary recipient of the request.
Request Date *	The date by which the requested information should be received. Click the arrow on the right side of **Request Date** list, and select a date in the calendar.
Subject *	The subject of the request. Type a subject in the **Subject** field.
Body *	The body text of the request. Type the text of the request in the **Body** field.

3. To add recipients for the request, do the following:
    a. Click anywhere in the **Recipient** table.
    b. In the **Recipients** dialog box, click one of the following buttons:
        - **New Primary Recipient**: creates a primary recipient.
        - **New Carbon Copy Recipient**: creates a recipient that receives a copy of the original request.
    c. Define the recipient properties:

Option	Description
To	The recipient company and person. Click the arrow on the right side of the leftmost **To** list, and select the recipient company in the list. Click the arrow on the right side of the rightmost **To** list, and select the recipient in the list. Note that only the companies that have been added for the project in the **Project Management** dialog box and their contact persons are available in the **Originator** lists.

Option	Description
Their RFI #	The recipient's request number. Type a number in the **Their RFI #** field.
Date Sent	The date when the request was sent to the recipient. Click the arrow on the right side of the **Date Sent** field, and select a date in the calendar.
Sent Via	The method with which the request was sent. The available methods are set in **Sent Via Maintenance**. For more information, see Create, modify, and delete methods for sending documents (page 26). Click the arrow on the right side of the **Sent Via** list, and select a sending method in the list.
Date Received	The date when the first response from the recipient was received. Click the arrow on the right side of the **Date Received** field, and select a date in the calendar.
Response Date	The date when all necessary information was received, and the request status could be set to **Closed**. The response date is included in RFI reports. Click the arrow on the right side of the **Response Date** field, and select a date in the calendar.
Response Details	Any information regarding the response. The response details are included in RFI reports. Type details in the **Response Details** field.

   d. To add the recipient, depending on the recipient type, click **Add PR** or **Add CC**.

      Repeat steps b to d for all necessary recipients.

   e. To close the **Recipients** dialog box, click the **Close** button (**X**) in the upper-right corner.

4. In the **Request For Information** dialog box, click **Add** to create the request.

5. To attach files to the new request, do the following:

   a. Select the request in the list.

   b. Click **Attached Files**.

   c. In the **RFI Files** dialog box, click **New**.

d. In the **Document Index - Add Document Reference** dialog box, add a file, a Microsoft Outlook email, or Microsoft Outlook email attachments.

   For more information, see Add document references for estimating jobs (page 40).

e. Click the arrow on the right side of the leftmost **RFI** list, and select the related request in the list.

f. Click the arrow on the right side of the rightmost **RFI** list, and select if the attachment is a request or a response.

g. Type a description for the attached file.

h. Click **Add Document Reference**.

   Repeat steps c to h for all necessary attachments.

i. In the **RFI Files** dialog box, click **Save**.

j. To close the **RFI Files** dialog box, click the **Close** button (**X**) in the upper-right corner.

Modify a request

Modify a request to change its properties. For example, you should close a request after receiving all necessary information.

1. In the **Request For Information** dialog box, select the request that you want to modify.
2. Modify the request properties according to your needs:

Option	Description
Originator	The party that initiated the original request. Click the arrow on the right side of the upper **Originator** list, and in the list, select the originator company. Click the arrow on the right side of the lower **Originator** list, and in the list, select the contact person that initiated the request. Note that only the companies that have been added for the project in the **Project Management** dialog box and their contact persons are available in the **Originator** lists.

Option	Description
Orig RFI #	The number of the original request that was sent to your company. Note that the **Orig RFI #** is only available and mandatory if the originator of the request is some other party than your company. Type the request number in the **Orig RFI #** field.
Orig RFI Date	The date when the original request was sent to your company. Note that the **Orig RFI Date** is only available and mandatory if the originator of the request is some other party than your company. Click the arrow on the right side of the **Orig RFI Date** list, and select a date in the calendar.
RFI #	The number of the request or response that you are sending. Note that an RFI number can only be used once. Type the request number in the **RFI #** field.
RFI Date	The date when you sent the request or a response to the request. Click the arrow on the right side of the **RFI Date** field, and select a date in the calendar.
RFI Status	Indicates if all necessary information regarding the request has been received. Remember to close requisitions once they have been responded to. Click the arrow on the right side of the **RFI Status** list, and select one of the following options: • **Open**: all necessary information has not been received. • **Closed**: all necessary information has been received.

Option	Description
Request Date	The date by which the requested information should be received. Click the arrow on the right side of the **Request Date** list, and select a date in the calendar.
Subject	The subject of the request. Type a subject in the **Subject** field.
Body	The body text of the request. Type the text of the request in the **Body** field.

3. To add recipients for the request, do the following:
   a. Click anywhere in the **Recipient** table.
   b. In the **Recipients** dialog box, modify the recipient properties according to your needs:

Option	Description
To	The recipient company and person. Click the arrow on the right side of the leftmost **To** list, and select the recipient company in the list. Click the arrow on the right side of the rightmost **To** list, and select the recipient in the list. Note that only the companies that have been added for the project in the **Project Management** dialog box and their contact persons are available in the **Originator** lists.
Their RFI #	The recipient's request number. Type a number in the **Their RFI #** field.
Date Sent	The date when the request was sent to the recipient. Click the arrow on the right side of the **Date Sent** field, and select a date in the calendar.
Sent Via	The method with which the request was sent. The available methods are set in **Sent Via Maintenance**. For more information, see Create, modify, and delete methods for sending documents (page 26). Click the arrow on the right side of the **Sent Via** list, and select a sending method in the list.

Option	Description
Date Received	The date when the first response from the recipient was received. Click the arrow on the right side of the **Date Received** field, and select a date in the calendar.
Response Date	The date when all necessary information was received, and the request status could be set to **Closed**. The response date is included in RFI reports. Click the arrow on the right side of the **Response Date** field, and select a date in the calendar.
Response Details	Any information regarding the response. The response details are included in RFI reports. Type details in the **Response Details** field.

c. Click **Edit** to save the changes.

   If necessary, you can also delete recipients by selecting them, clicking **Delete**, and clicking **Yes** to confirm.

d. To close the **Recipients** dialog box, click the **Close** button (**X**) in the upper-right corner.

4. To modify the files that are attached to the request, do the following:

   a. Select the request in the list.

   b. Click **Attached Files**.

   c. In the **RFI Files** dialog box, select an attachment and modify its description according to your needs.

   d. If necessary, click the arrow on the right side of the list that is next to the description, and select if the attachment is related to a request or a response.

   e. Click **Save**.

      If necessary, you can also delete attached files by selecting them, clicking **Delete**, and clicking **Yes** to confirm.

   f. To close the **RFI Files** dialog box, click the **Close** button (**X**) in the upper-right corner.

Delete a request

Note that deleting a request is permanent and cannot be undone.

1. In the **Request For Information** dialog box, select the request that you want to delete.
2. Click **Delete**.

3. To permanently delete the request, click **Yes** in the confirmation dialog box.

View requests for information

Use the **View Selected RFIs** command to open the currently selected requests for information in **Tekla EPM Report Viewer**.

1. In the **Request For Information** dialog box, select the requests that you want to view.

   To select multiple requests, hold down **Ctrl**.

   To select a range of subsequent requests, hold down **Shift**.

2. Double-click one of the selected requests.
3. In the **View RFI** dialog box, select or clear the following check boxes according to your needs:

Option	Description
Show Company Logo (If Exists)	When selected, your company logo is visible in the requests.
Include Impact Text	When selected, Tekla EPM includes text regarding the importance of the requested information and the delay that may be caused if the response is not sent on time.

4. If necessary, in the **Additional Pages** field, type the number of pages you want to add to the request for the attachments to be included.
5. In the **Author** field, type the name of the author.

   If you do not type a name in the **Author** field, Tekla EPM uses the name of your company instead.

6. To view the request, click **View Request**.

The selected requests open in **Tekla EPM Report Viewer**.

In the **Tekla EPM Report Viewer** window, you can send the requests via email either as PDF files or Microsoft Excel worksheets, print the requests, or export the requests and save them in another file format.

See also

Print requests for information (page 88)

Send a request for information via email (page 90)

Print requests for information

Use the **Print Selected RFIs** command to print one or multiple requests for information.

1. In the **Request For Information** dialog box, select the requests that you want to print.

   To select multiple requests, hold down **Ctrl**.

   To select a range of subsequent requests, hold down **Shift**.

2. Click the **Request For Information** ribbon tab.
3. In the menu, select **Print Selected RFIs**.
4. In the **Print RFI** dialog box, select or clear the following check boxes according to your needs:

Option	Description
Show Company Logo (If Exists)	When selected, your company logo is visible in the requests.
Include Impact Text	When selected, Tekla EPM includes text regarding the importance of the requested information and the delay that may be caused if the response is not sent on time.

5. If necessary, in the **Additional Pages** field, type the number of pages you want to add to the request for the attachments to be included.
6. In the **Author** field, type the name of the author.

   If you do not type a name in the **Author** field, Tekla EPM uses the name of your company instead.

7. In the **Copies** field, type the number of printed copies.
8. Click **Change Printer**.
9. In the **Select Printer** dialog box, click a printer to select it.
10. Click **OK**.
11. Click **Print RFI**.

See also

Send a request for information via email (page 90)

Import or export requests for information

You can import or export requests for information. Use the XML file format when exporting requests, so that the requests can easily be imported back to Tekla EPM by another party in the current project.

Import requests

1. In the **Request For Information** dialog box, click the **Request For Information** ribbon tab.
2. In the menu, select **Data Exchange** --> **Import** .
3. In the **Open** dialog box, browse to find the file that you want to import.
4. Double-click the file that you want to import, or click **Open**.
5. In the **Import Tekla EPM Exchange File** dialog box, review the import progress.
6. When the import process is completed, click **Close**.

Export requests

1. In the **Request For Information** dialog box, click the request that you want to export.
2. In the menu, select **Data Exchange** --> **Export Selected RFIs** .
3. In the **Save As** dialog box, browse to the folder where you want to save the file.

   By default, Tekla EPM saves the file to the **Export** folder.
4. If necessary, modify the file name.
5. Click **Save**.

Save a request for information as a Microsoft Word document

Use the **Make Word Document** command to save a request for information as a Microsoft Word document.

1. In the **Request For Information** dialog box, select the request that you want to save as a Microsoft Word document.
2. Click the **Request For Information** ribbon tab.
3. In the menu, select **Make Word Document**.
4. In the **Save As** dialog box, browse to the folder where you want to save the file.
5. If necessary, modify the file name.
6. Click **Save**.

See also

Import or export requests for information (page 89)

Send a request for information via email

Use the **Email Selected RFI** command to send the currently selected request for information via email.

Note that the **Email Selected RFI** command only works with Microsoft Outlook, so you need to have Microsoft Outlook open before trying to send a transmittal by email.

1. In the **Request For Information** dialog box, select the requests that you want to send via email.
2. Click the **Request For Information** ribbon tab.
3. In the menu, select **Email Selected RFI**.

   The **Email** dialog box opens.

   Note that the recipients and attachments defined in the **Request For Information** are automatically added to the **Included** lists.
4. Click the arrow buttons to move additional recipients to the **Recipients Included** list.
5. If some of the recipients do not have an email address saved in the **Address Book**, do the following:
   a. Select the recipient in the **Recipients Included** list.
   b. Type the email address in the **Email Address** field.
   c. Click **Set Email Address**.
   d. In the confirmation dialog box, select if you want to save the email address for the contact in the **Address Book**.
6. Click the arrow buttons to move the attachments that you want to include in the email to the **Attachments Included** list.
7. Select or clear the following check boxes according to your needs:

Option	Description
Attach Tekla EPM data exchange file	When selected, the request information is converted to an XML file, which another Tekla EPM user can import to Tekla EPM. This can be useful if other parties in the project use Tekla EPM as well.
Attach PDF export of the RFI	When selected, a PDF version of the request is attached to the email. Note that if your company is not the originator of the request, the PDF created for the email will be blank.

Option	Description
Show Company Logo (If Exists)	When selected, your company logo is visible in the request. Note that the **Show Company Logo (If Exists)** check box is only available if the **Attach PDF export of the RFI** check box is selected.
Include Impact Text	When selected, Tekla EPM includes a notice regarding the importance of the requested information and the delay that may be caused if the response is not sent on time. Note that the **Show Company Logo (If Exists)** check box is only available if the **Attach PDF export of the RFI** check box is selected.

8. If necessary, in the **Additional Pages** field, type the number of pages you want to add to the request for the attachments to be included.

   Note that the **Additional Pages** field is only available if the **Attach PDF export of the RFI** check box is selected.

9. In the **Author** field, type the name of the author.

   If you do not type a name in the **Author** field, Tekla EPM uses the name of your company instead.

10. Click **Email**.

See also

Save a request for information as a Microsoft Word document (page 90)

Import or export requests for information (page 89)

View, print, or export RFI reports

You can create reports based on the existing requests for information, or RFIs. For example, you can create a report containing all the overdue RFIs or the RFI details. You can then view, print, or export the created reports. Use the **Reports** command to create a report on all requests or requests that match specific filters, or use the **Reports - Selected** command to create a report on the requests that you select in the **Request For Information** dialog box.

Create an RFI report

1. In the **Request For Information** dialog box, click the **Request For Information** ribbon tab.
2. Do either of the following:

To	Do this
Create reports on all RFIs or specific types of RFIs	a. In the menu, select **Reports**. b. To only create RFI reports, at the bottom of the **Project Management Report Filters** dialog box, ensure that only the **RFIs** check box is selected. c. To only include specific types of requests in the reports, in the **Project Management Report Filters** dialog box, select a filter type in the **Type** list, and click **Select**. d. In the **Filter** dialog box, do one of the following depending on the filter type: • Click the arrow buttons to move the request properties that you want to include in the report to the **Included** list. • Type the maximum and minimum values for the requests that you want to include. For example, you can define the earliest and latest date for the requests that you want to include. e. Click **OK**. To further limit the requests that are included in the reports, repeat steps b to d for all necessary filter types. f. Click **Make Report**.
Create reports on the currently selected RFIs	a. In the menu, select **Reports - Selected**.

3. In the **Report Selection** dialog box, select the report that you want to view, print, or export.

View the RFI report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the RFI report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.

3. To confirm printing the report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the RFI report

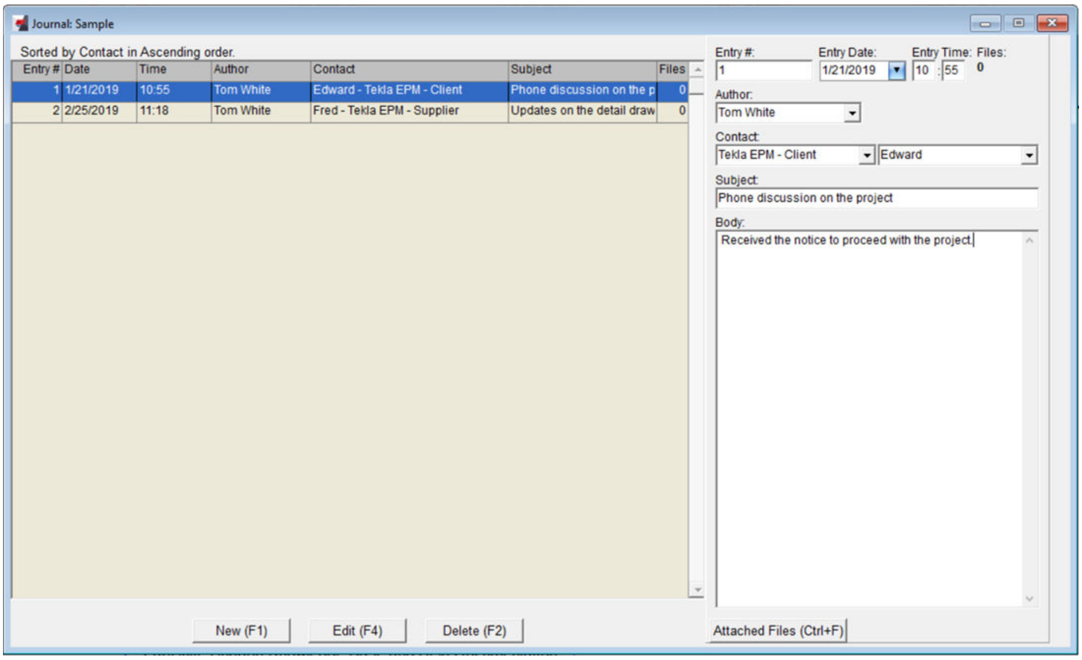
1. Click **Export**.
2. In the **Export Format** list, select an export format.
3. Click **Browse**.
4. Browse to the location where you want to save the exported file, and click **Save**.
5. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
6. If you want to open the file after exporting it, select the **Open Exported Document** check box.
7. Click **Export**.

2.10 Manage the project journal

The project journal allows you to keep a chronological record of the project. In the **Journal** dialog box, you can add journal entries regarding emails, telephone conversations, or any other project information that needs to be recorded. By adding journal entries in the **Journal**, you can ensure that everyone in the project knows the relevant details about the project.

- In the **Project Management** dialog box, do either of the following:
  - Click the **Journal Entries** button.
  - Click the **Project Management** ribbon tab, and in the menu, select **Journal Entries**.

The **Journal** dialog box opens.



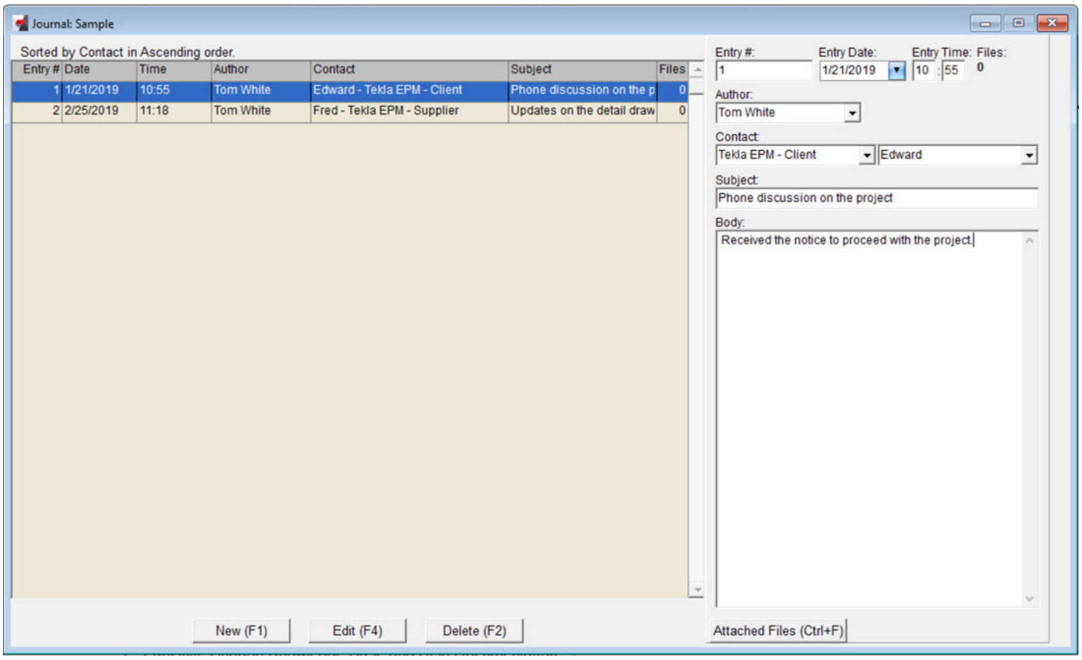
For more information, see the following links:

Add, modify, and delete journal entries (page 95)

View, print, and export project journal reports (page 99)

Add, modify, and delete journal entries

Use the **Journal** dialog box to manage and record journal entries related to the project. You can add new journal entries, attach files or emails to journal entries, modify existing journal entries, or delete journal entries.



Add a journal entry

1. In the **Journal** dialog box, click **New**.
2. Define the properties of the journal entry:

   The items that are marked with an asterisk (*) in the following table are mandatory information.

Option	Description
Entry # *	The number of the journal entry. Tekla EPM automatically populates the **Entry #** field with the next available entry number. If necessary, type a different number in the **Entry #** field.
Entry Date *	The date of the recorded event. By default, Tekla EPM suggests the current date. If necessary, click the arrow on the right side of the **Entry Date** field, and select a date in the calendar.
Entry Time *	The time of the recorded event. By default, Tekla EPM suggests the current time. If necessary, type another time in the **Entry Time** fields.

Option	Description
Author *	The creator of the journal entry. Click the arrow on the right side of the **Author** list, and select a user in the list. Note that only Tekla EPM users in your company are available in the list.
Contact	The project party related to the recorded event. For example, the contact person with whom you had a telephone conversation and their company. Note that only the companies that have been added for the project in the **Project Management** dialog box and their contact persons are available in the **Contact** lists. Click the arrow on the right side of the leftmost **Contact** list, and select the related company in the list. Click the arrow on the right side of the rightmost **Contact** list, and select the contact person in the list.
Subject *	The subject of the journal entry. Type the subject in the **Subject** field.
Body	The details of the journal entry. Type any relevant information in the **Body** field.

3. Click **Add**.
4. To attach a file to the new journal entry, do the following:
   a. Select the new journal entry.
   b. Click **Attached Files**.
   c. In the **Journal Entry Files** dialog box, click **New**.
   d. In the **Document Index - Add Document Reference** dialog box, add a file, a Microsoft Outlook email, or Microsoft Outlook email attachments.

      For more information, see Add document references for estimating jobs (page 40).
   e. Click the arrow on the right side of the leftmost **Journal Entry** list, and select the journal entry to which you want to attach the file.
   f. Type a description for the attached file.
   g. Click **Add Document Reference**.

      Repeat steps c to g for to add all necessary attachments.

h. In the **Journal Entry Files** dialog box, click **Save**.
i. To close the **Journal Entry Files** dialog box, click the **Close** button (**X**) in the upper-right corner.

Modify a journal entry

1. In the **Journal** dialog box, select the journal entry that you want to modify.
2. Modify the journal entry properties according to your needs:

Option	Description
Entry #	The number of the journal entry. Tekla EPM automatically populates the **Entry #** field with the next available entry number. If necessary, type a different number in the **Entry #** field.
Entry Date	The date of the recorded event. By default, Tekla EPM suggests the current date. If necessary, click the arrow on the right side of the **Entry Date** field, and select a date in the calendar.
Entry Time	The time of the recorded event. By default, Tekla EPM suggests the current time. If necessary, type another time in the **Entry Time** fields.
Author	The creator of the journal entry. Click the arrow on the right side of the **Author** list, and select a user in the list. Note that only Tekla EPM users in your company are available in the list.
Contact	The project party related to the recorded event. For example, the contact person with whom you had a telephone conversation and their company. Note that only the companies that have been added for the project in the **Project Management** dialog box and their contact persons are available in the **Contact** lists.

Option	Description
	Click the arrow on the right side of the leftmost **Contact** list, and select the related company in the list. Click the arrow on the right side of the rightmost **Contact** list, and select the contact person in the list.
Subject	The subject of the journal entry. Type the subject in the **Subject** field.
Body	The details of the journal entry. Type any relevant information in the **Body** field.

3. Click **Edit** to save the changes.
4. To modify the files that are attached to the journal entry, do the following:
   a. Select the journal entry whose attached files you want to modify.
   b. Click **Attached Files**.
   c. In the **Journal Entry Files** dialog box, select an attachment and modify its description according to your needs.
   d. Click **Save**.

      If necessary, you can also delete attached files by selecting them, clicking **Delete**, and clicking **Yes** to confirm.
   e. To close the **Journal Entry Files** dialog box, click the **Close** button (**X**) in the upper-right corner.

Delete journal entries

1. In the **Journal** dialog box, select the journal entries that you want to delete.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.
2. Click **Delete**.
3. To permanently delete the journal entries, click **Yes** in the confirmation dialog box.

View, print, and export project journal reports

You can create reports based on the existing journal entries. For example, you can create a report containing all journal entries, or the authors of journal entries. You can then view, print, or export the created reports. Use the **Reports** command to create a report on all journal entries or journal entries that match specific filters, or use the **Reports - Selected** command to create a report on the journal entries that are currently selected in the **Journal** dialog box.

Create a project journal report

1. In the **Journal** dialog box, click the **Journal** ribbon tab.
2. Do either of the following:

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td>Create reports on all journal entries or specific types of journal entries</td><td>a. In the menu, select Reports.
b. To only create journal reports, at the bottom of the Project Management Report Filters dialog box, ensure that only the Journal Entries check box is selected.
c. To only include specific types of journal entries in the reports, in the Project Management Report Filters dialog box, select a filter type in the Type list, and click Select.
d. In the Filter dialog box, do one of the following depending on the filter type:
• Click the arrow buttons to move the journal entry properties that you want to include in the report to the Included list.
• Type the maximum and minimum values for the journal entries that you want to include.
For example, define the earliest and latest date for the journal entries that you want to include.
e. Click OK.
To further limit the journal entries that are included in the reports, repeat steps b to d for all necessary filter types.
f. Click Make Report.</td></tr>
<tr><td>Create reports on the currently selected journal entries</td><td>a. In the menu, select Reports - Selected.</td></tr>
</table>

3. In the **Report Selection** dialog box, select the report that you want to view, print, or export.

View the journal report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the journal report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the journal report

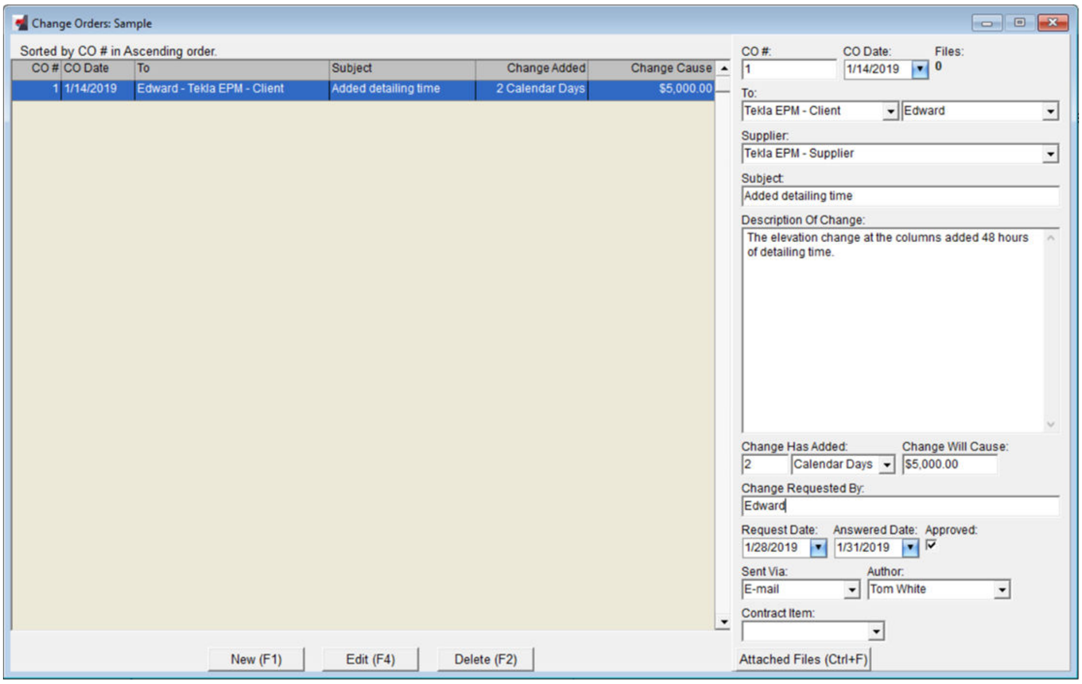
1. Click **Export**.
2. In the **Export Format** list, select an export format.
3. Click **Browse**.
4. Browse to the location where you want to save the exported file, and click **Save**.
5. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
6. If you want to open the file after exporting it, select the **Open Exported Document** check box.
7. Click **Export**.

2.11 Manage change orders

Change orders can be any changes made to the original contract that affect the project schedule and costs. You can manage the change orders related to the current project management project in the **Change Orders** dialog box:

- In the **Project Management** dialog box, do either of the following:
  - Click the **Change Orders** button.
  - Click the **Project Management** ribbon tab, and in the menu, select **Change Orders**.

The **Change Orders** dialog box opens.



For more information, see the following links:

Create, modify, and delete change orders (page 102)

View change orders (page 108)

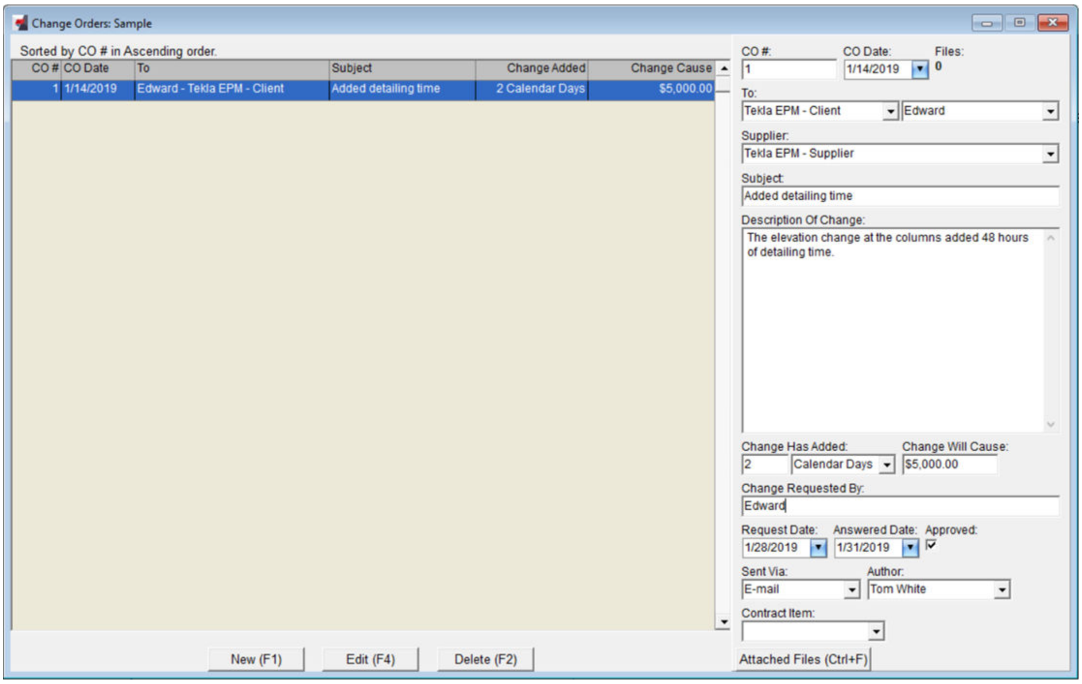
Print change orders (page 109)

View, print, or export change order reports (page 110)

Create, modify, and delete change orders

Use the **Change Orders** dialog box to manage and record changes requested and made to the original contract. You can create new change order requests, attach files or emails to change order requests, modify existing change order requests, or delete change order requests.

NOTE The items in the **Change Orders** dialog box are not change orders for contract purposes. Instead, the items represent the change order requests made regarding the project.



Create a change order

1. At the bottom of the **Change Orders** dialog box, click **New**.
2. Define the properties of the change order.

   The items that are marked with an asterisk (*) in the following table are mandatory information.

Option	Description
CO # *	The number of the change order. Tekla EPM automatically populates the **CO #** field with the next available number. You can change the number according to your needs.
CO Date *	The date when the change order was sent. Click the arrow on the right side of the **CO Date** field, and select a date in the calendar.
To *	The recipient company and person of the change order. Click the arrow on the right side of the leftmost **To** list, and select the recipient company in the list. Click the arrow on the right side of the rightmost **To** list, and select the recipient in the list. Note that only the companies that have been added for the project in the **Project Management**

Option	Description
	dialog box and their contact persons are available in the **To** lists.
Supplier	The supplier that is affected by the change order. Click the arrow on the right side of the **Supplier** list, and select a supplier in the list. Note that only the companies with the firm type **Supplier** that have been added for the project in the **Project Management** dialog box are available in the **Supplier** lists. Since the supplier is normally the fabricator, you may need to copy your company as a supplier in the project. For more information, see Manage companies in the project (page 48).
Subject *	The subject of the change order, visible in the change order document. Type the subject in the **Subject** field.
Description Of Change	The description of the change that should be made. Type a description in the **Description Of Change** field.
Change Has Added	The number of calendar days, work days, weeks, or months that the change has added to the project duration. The time entered here will be displayed in the project schedule. In the **Change Has Added** field on the left, type the desired number. Then, click the arrow on the right side of the **Change Has Added** list, and select the unit of time in the list.
Change Will Cause	The total sum that making the change will add to the project costs or subtract from the project costs. Type the costs in the **Change Will Cause** field.
Change Requested By	The source that requested making the change. For example, this can be a party in the project, a document, or a response to an RFI. Type a value in the **Change Requested By** field.
Request Date	The date when the change was requested. Click the arrow on the right side of **Request Date** field, and select a date in the calendar.

Option	Description
Answered Date	The date when the supplier has replied to the change order. Click the arrow on the right side of **Answered Date** field, and select a date in the calendar.
Approved	When selected, the change has been approved. Remember to select the **Approved** check box when the change order has been approved. When you do so, the change order is sent to **Contract & Invoicing**.
Sent Via *	The method with which the change order has been sent. The options available in the **Sent Via** list are set in the **Sent Via Maintenance** dialog box. For more information, see Create, modify, and delete methods for sending documents (page 26). Click the arrow on the right side of the **Sent Via** list, and select a sending method in the list.
Author *	The Tekla EPM user who created the change order. Click the arrow on the right side of the **Author** list, and select a user in the list. Only the Tekla EPM users in your company are available in the **Author** list.
Contract Item	The item in the project contract that the change order is linked to. For more information, see Add and modify contract information (page 166). The **Contract Item** field is not included in the **Change Orders** dialog box by default. You can add the **Contract Item** field by modifying the input fields for change orders. For more information, see . Click the arrow on the right side of **Contract Item** list, and select the contract item.

3. Click **Add**.
4. To attach files to the new change order, do the following:
   a. Select the change order in the list.
   b. At the bottom of the dialog box, click **Attached Files**.
   c. In the **Change Order Files** dialog box, click **New**.

d. In the **Document Index - Add Document Reference** dialog box, add a file, a Microsoft Outlook email, or a Microsoft Outlook email attachments.

   For more information, see Add document references for estimating jobs (page 40).

e. Click the arrow on the right side of the **Change Order** list, and select the change order to which you want to attach the file.

f. Type a description for the attached file.

g. Click **Add Document Reference**.

   Repeat steps c to g for all necessary attachments.

h. In the **Change Order Files** dialog box, click **Save**.

i. To close the **Change Order Files** dialog box, click the **Close** button (**X**) in the upper-right corner.

You can see the number of attached files in the upper-right corner of the **Change Orders** dialog box.

Modify a change order

1. In the **Change Orders** dialog box, select the change order that you want to modify.
2. Modify the properteis of the change order:

Option	Description
CO #	The number of the change order. Tekla EPM automatically populates the **CO #** field with the next available number. You can change the number according to your needs.
CO Date	The date when the change order was sent. Click the arrow on the right side of the **CO Date** field, and select a date in the calendar.
To	The recipient company and person of the change order. Click the arrow on the right side of the leftmost **To** list, and select the recipient company in the list. Click the arrow on the right side of the rightmost **To** list, and select the recipient in the list. Note that only the companies that have been added for the project in the **Project Management** dialog box and their contact persons are available in the **To** lists.

Option	Description
Supplier	The supplier that is affected by the change order. Click the arrow on the right side of the **Supplier** list, and select a supplier in the list. Note that only the companies with the firm type **Supplier** that have been added for the project in the **Project Management** dialog box are available in the **Supplier** lists.
Subject	The subject of the change order, visible in the change order document. Type the subject in the **Subject** field.
Description Of Change	The description of the change that should be made. Type a description in the **Description Of Change** field.
Change Has Added	The number of calendar days, work days, weeks, or months that the change has added to the project duration. The time entered here will be displayed in the project schedule. In the **Change Has Added** field on the left, type the desired number. Then, click the arrow on the right side of the **Change Has Added** list, and select the unit of time in the list.
Change Will Cause	The total sum that making the change will add to the project costs or subtract from the project costs. Type the costs in the **Change Will Cause** field.
Change Requested By	The party that requested making the change. Type a name in the **Change Requested By** field.
Request Date	The date when the change was requested. Click the arrow on the right side of the **Request Date** field, and select a date in the calendar.
Answered Date	The date when the supplier has approved or rejected the change order. Click the arrow on the right side of the **Answered Date** field, and select a date in the calendar.
Approved	When selected, the change has been approved. Remember to select the **Approved** check box when the change order has been approved, so that Tekla EPM will not mark the change order as overdue.

Option	Description
Sent Via	The method with which the change order has been sent. The options available in the **Sent Via** list are set in the **Sent Via Maintenance** dialog box. For more information, see Create, modify, and delete methods for sending documents (page 26). Click the arrow on the right side of the **Sent Via** list, and select a sending method in the list.
Author	The Tekla EPM user that created the change order. Click the arrow on the right side of the **Author** list, and select a user in the list. Only the Tekla EPM users in your company are available in the **Author** list.

3. To modify the files attached to the change order, do the following:
    a. Select the change order.
    b. At the bottom of the dialog box, click **Attached Files**.
    c. In the **Change Order Files** dialog box, select an attachment and modify its description according to your needs.
    d. Click **Save**.

        If necessary, you can also delete attached files by selecting them, clicking **Delete**, and clicking **Yes** to confirm.

        To attach new files, see Create a change order.
    e. To close the **Change Order Files** dialog box, click the **Close** button (**X**) in the upper-right corner.

Delete change orders

Note that deleting change orders is permanent and cannot be undone.

1. In the **Change Orders** dialog box, select the change orders that you want to delete.

    To select multiple items, hold down **Ctrl**.

    To select a range of subsequent items, hold down **Shift**.
2. Click **Delete**.
3. To permanently delete the change orders, click **Yes** in the confirmation dialog box.

View change orders

Use the **View Selected Change Orders** command to view the currently selected change orders in **Tekla EPM Report Viewer**.

1. In the **Change Orders** dialog box, select the change orders that you want to view.

   To select multiple change orders, hold down **Ctrl**.

   To select a range of subsequent change orders, hold down **Shift**.
2. Double-click one of the selected change orders.
3. To display your company logo in the change order, in the **View Change Order** dialog box, select the **Show Company Logo (If Exists)** check box.
4. Click **View**.

The selected change orders open in **Tekla EPM Report Viewer**.

In the **Tekla EPM Report Viewer** window, you can send the change orders via email as either PDF files or Microsoft Excel worksheets, print the change orders, or export the change orders and save them in another file format.

See also

Print change orders (page 109)

View, print, or export change order reports (page 110)

Print change orders

Use the **Print Selected Change Orders** to print one or multiple change orders at one go.

1. In the **Change Orders** dialog box, select the change orders that you want to print.

   To select multiple change orders, hold down **Ctrl**.

   To select a range of subsequent change orders, hold down **Shift**.
2. Click the **Change Orders** ribbon tab.
3. In the menu, select **Print Selected Change Orders**.
4. To display your company logo in the change order, in the **Print Change Order** dialog box, select the **Show Company Logo (If Exists)** check box.
5. In the **Copies** field, type the number of printed copies.
6. Click **Change Printer**.
7. In the **Select Printer** dialog box, click a printer to select it.
8. Click **OK**.
9. In the **Print Change Order** dialog box, click **Print**.

See also

View, print, or export change order reports (page 110)

View, print, or export change order reports

You can create reports based on the existing change orders. For example, you can create a report of all change orders or a report on overdue change orders. You can then view, print, or export the created reports. Use the **Reports** command to create a report on all change orders or change orders that match specific filters, or use the **Reports - Selected** command to create a report on the change orders that are currently selected in the **Change Orders** dialog box.

Create a change order report

1. In the **Change Orders** dialog box, click the **Change Orders** ribbon tab.
2. Do either of the following:

To	Do this
Create reports on all change orders or specific types of change orders	a. In the menu, select **Reports**. b. To only create change order reports, at the bottom of the **Project Management Report Filters** dialog box, ensure that only the **Change Orders** check box is selected. c. To only include specific types of change orders in the reports, in the **Project Management Report Filters** dialog box, select a filter type in the **Type** list, and click **Select**. d. In the **Filter** dialog box, do one of the following depending on the filter type: • Click the arrow buttons to move the change order properties that you want to include in the report to the **Included** list. • Type the maximum and minimum values for the change orders that you want to include. For example, define the earliest and latest dates for the change orders that you want to include. e. Click **OK**. To further limit the change orders that are included in the reports, repeat steps b to d for all necessary filter types.

To	Do this
	f. Click **Make Report**.
Create reports on the currently selected change orders	a. In the menu, select **Reports - Selected**.

3. In the **Report Selection** dialog box, select the report that you want to view, print, or export.

View the change order report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the change order report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the change order report

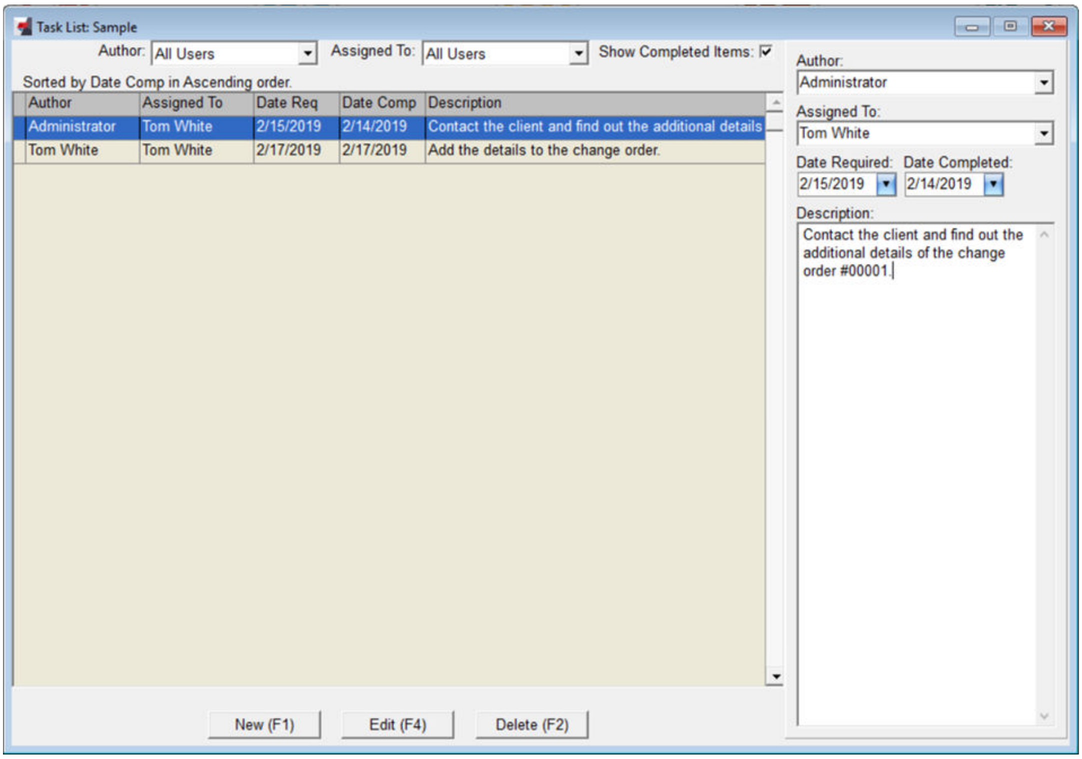
1. Click **Export**.
2. In the **Export Format** list, select an export format.
3. Click **Browse**.
4. Browse to the location where you want to save the exported file, and click **Save**.
5. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
6. If you want to open the file after exporting it, select the **Open Exported Document** check box.
7. Click **Export**.

2.12 Manage the project task list

The task list items in the **Task List** dialog box serve as reminders for the user that they have been assigned project tasks. The items on your task list can also be assigned to other users. If you have unfinished tasks on your task list, the **Task List** dialog box opens automatically when you sign in to Tekla EPM. You can also access the **Task List** dialog box manually:

- In the **Project Management** dialog box, do either of the following:
    - Click the **Task List** button.

      Note that the **Task List** button also shows the number of open tasks that are assigned to you.
    - Click the **Project Management** ribbon tab, and in the menu, select **Task List**.



You can filter which items you want to see in the **Task List** dialog box:

- To only view tasks created by a specific Tekla EPM user, click the arrow on the right side of the **Author** list, and select the user in the list.
- To only view tasks assigned to a specific Tekla EPM user, click the arrow on the right side of the **Assigned To** list, and select the user in the list.
- To show the completed tasks, select the **Show Completed Items** check box.
- To hide the completed tasks, clear the **Show Completed Items** check box.

For more information, see the following links:

Create, modify, and delete task list items (page 113)

View, print, and export task list reports (page 114)

Create, modify, and delete task list items

Use the **Task List** dialog box to create, modify, and delete task list items. You can add completion dates for tasks that have been completed, or re-assign tasks to other Tekla EPM users.

Create a task list item

1. In the **Task List** dialog box, click **New**.
2. Define the task list item properties.

   The items that are marked with an asterisk (*) in the following table are mandatory information.

Option	Description
Author	The Tekla EPM user that created the task list item. Click the arrow on the right side of the **Author** list, and select a user in the list.
Assigned To	The Tekla EPM user to whom the task list item is assigned. Click the arrow on the right side of the **Assigned To** list, and select a user in the list.
Date Required	The date by which the task list item should be completed. Click the arrow on the right side of the **Date Required** field, and select a date in the calendar.
Date Completed	The date when the task was completed. Click the arrow on the right side of the **Date Completed** field, and select a date in the calendar.
Description *	The description of the task list item. Type the task description in the **Description** field.

3. Click **Add**.

Modify a task list item

By modifying a task list item, you can change its properties. For example, add completion dates for tasks that have been completed.

1. In the **Task List** dialog box, select the task list item that you want to modify.
2. Modify the task list item properties:

Option	Description
Author	The Tekla EPM user that created the task list item. Click the arrow on the right side of the **Author** list, and select a user in the list.
Assigned To	The Tekla EPM user to whom the task list item is assigned. Click the arrow on the right side of the **Assigned To** list, and select a user in the list.
Date Required	The date by which the task list item should be completed. Click the arrow on the right side of the **Date Required** field, and select a date in the calendar.
Date Completed	The date when the task was completed. Click the arrow on the right side of the **Date Completed** field, and select a date in the calendar.
Description	The description of the task list item. Type the task description in the **Description** field.

3. Click **Edit** to save the changes.

Delete task list items

Note that deleting task list items is permanent and cannot be undone.

1. In the **Task List** dialog box, select the task list items that you want to delete.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.
2. Click **Delete**.
3. To permanently delete the task list items, click **Yes** in the confirmation dialog box.

View, print, and export task list reports

Use the **Reports** command in the **Task List** menu to create a report out of the task list. You can decide to include all tasks list items in the current project, or only overdue or open task list items.

Create a task list report

1. In the **Task List** dialog box, click the **Task List** ribbon tab.
2. In the menu, select **Reports**.
3. To only create task list reports, at the bottom of the **Project Management Report Filters** dialog box, ensure that only the **Task List** check box is selected.
4. To only include specific types of task list items in the reports, in the **Project Management Report Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
5. In the **Filter** dialog box, do one of the following depending on the filter type:
    - Click the arrow buttons to move the task list item properties that you want to include in the report to the **Included** list.
    - Type the maximum and minimum values for the task list item that you want to include.
6. Click **OK**

    To further limit the task list items that are included in the reports, repeat steps 3 to 5 for all necessary filter types.
7. Click **Make Report**.
8. In the **Report Selection** dialog box, select the report that you want to view, print, or export.

View, print, and export task list reports

Use the **Reports** command in the **Task List** menu to create a report out of the task list. You can decide to include all tasks list items in the current project, or only overdue or open task list items.

View the task list report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the task list report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the task list report

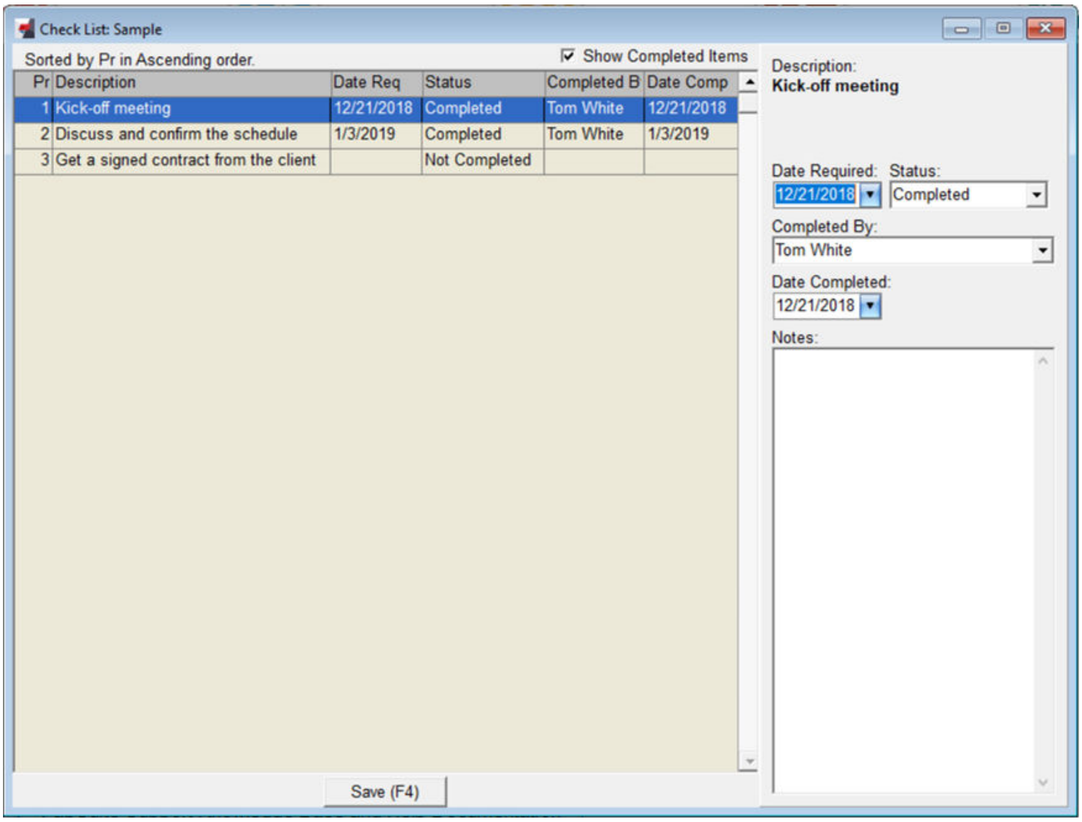
1. Click **Export**.
2. In the **Export Format** list, select an export format.
3. Click **Browse**.
4. Browse to the location where you want to save the exported file, and click **Save**.
5. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
6. If you want to open the file after exporting it, select the **Open Exported Document** check box.
7. Click **Export**.

2.13 Manage the project check list

Use the project check list to ensure that all steps in the current project are completed. In the **Check List** dialog box, you can add previously created steps to the project or delete unnecessary steps.

- In the **Project Management** dialog box, do either of the following:
  - Click the **Check List** button at the bottom of the dialog box.

    Note that you can view the number of completed and total tasks on the **Check List** button.
  - Click the **Project Management** ribbon tab, and in the menu, select **Check List**.



You can filter the **Check List** dialog box to show or hide completed steps:

- To show the completed tasks, select the **Show Completed Items** check box.
- To hide the completed tasks, clear the **Show Completed Items** check box.

For more information, see the following links:

Add check list items (page 117)

Modify a check list item (page 119)

Send check list items to the task list (page 118)

Delete check list items from a project (page 119)

View, print, or export check list reports (page 120)

Add check list items

Use the **Add Additional Check List Items** to add previously created check list items to the check list of the current project.

Note that to add new check list items, the items need to be created in the **Check List Item Maintenance** dialog box. For more information, see Create, modify, and delete common steps for project management jobs (page 23).

1. In the **Check List** dialog box, click the **Check List** ribbon tab.
2. In the menu, select **Add Additional Check List Items**.
3. In the **Add Check List Items** dialog box, click the arrow buttons to move the items that you want to include in the check list to the **Included** list.
4. Click **Add**.

The selected check list items are added to the **Check List** dialog box.

Now, you can modify the properties of the new check list items, such as its status and required date.

See also

Modify a check list item (page 119)

Delete check list items from a project (page 119)

Send check list items to the task list

If necessary, you can send items in the project check list to the task list of a Tekla EPM user that participates in the current project.

1. In the **Check List** dialog box, select the check list items that you want to send to the task list.

   To select multiple items, hold down **Ctrl**.

   To select a range of subsequent items, hold down **Shift**.
2. Click the **Check List** ribbon tab.
3. In the menu, select **Move Selected Check List Items to Task List**.
4. Click the arrow on the right side of the **Assign To** list in the **Move To Task List** and select to which user you want to assign the check list items.
5. Click **Move**.

The items are moved to the task list of the selected user.

The **Notes** fields of the items show that the items have been sent to the task list of the selected user.

See also

Manage the project task list (page 111)

Modify a check list item

You can modify the properties of a check list item according to your needs. For example, you might need to mark a check list item as completed, or modify the date by which the item should be completed.

1. In the **Check List** dialog box, select the check list item that you want to modify.
2. Modify the check list item properties:

Option	Description
Date Required	The date by which the check list item should be completed. Click the arrow on the right side of the **Date Required** field, and select a date in the calendar.
Status	The completion status of the check list item. The options are **Completed**, **Not Completed**, and **N/A** (not applicable). Click the arrow on the right side of the **Status** list, and select a status option in the list.
Completed By	The Tekla EPM user who completed the check list item. Click the arrow on the right side of the **Completed By** list, and select a user in the list.
Date Completed	The date when the check list item was completed. Click the arrow on the right side of the **Date Completed** field, and select a date in the calendar.
Notes	Any relevant notes about the check list item. Type any information in the **Notes** field.

3. Click **Save**.

See also

Add check list items (page 117)

Delete check list items from a project (page 119)

Delete check list items from a project

Use the **Delete Selected Check List Items** command to delete check list items that are not necessary for the current project.

1. In the **Check List** dialog box, select the check list items that you want to delete.

To select multiple items, hold down **Ctrl**.

To select a range of subsequent items, hold down **Shift**.

2. Click the **Check List** ribbon tab.
3. In the menu, select **Delete Selected Check List Items**.
4. To permanently delete the check list items, click **Yes** in the confirmation dialog box.

View, print, or export check list reports

Use the **Reports** command to create various check list reports. For example, you can create reports that show the statuses of the check list items or the dates when the check list items have been completed.

Create a check list report

1. In the **Check List** dialog box, click the **Check List** ribbon tab.
2. In the menu, select **Reports**.
3. To only create check list reports, at the bottom of the **Project Management Report Filters** dialog box, ensure that only the **Check List** check box is selected.
4. To only include specific types of check list items in the reports, in the **Project Management Report Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
5. In the **Filter** dialog box, do one of the following depending on the filter type:
   - Click the arrow buttons to move the check list item properties that you want to include in the report to the **Included** list.
   - Type the maximum and minimum values for the check list items that you want to include.

     For example, define the earliest and latest completion date for the check list items that you want to include.
6. Click **OK**

   To further limit the types of check list items that are included in the reports, repeat steps 3 to 5 for all necessary filter types.
7. Click **Make Report**.
8. In the **Report Selection** dialog box, select the report that you want to view, print, or export.

View the check list report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the check list report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the check list report

1. Click **Export**.
2. In the **Export Format** list, select an export format.
3. Click **Browse**.
4. Browse to the location where you want to save the exported file, and click **Save**.
5. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
6. If you want to open the file after exporting it, select the **Open Exported Document** check box.
7. Click **Export**.

2.14 View and adjust the project schedule

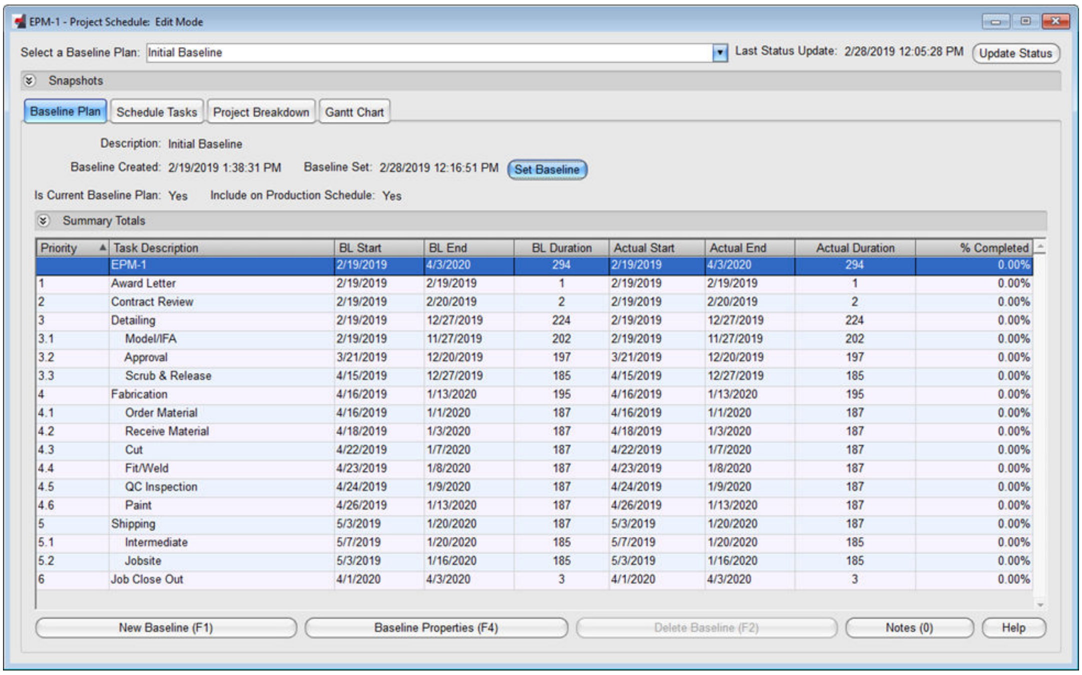
In the **Project Schedule** dialog box, you can create, view, and modify the project schedule of the current project. Note that you can only access the **Project Schedule** dialog box from a production control job if you have linked the production control job to a project management job.

To access the **Project Schedule** dialog box, do one the following:

To	Do this
Access the project schedule from the **Project Management** module	• At the bottom of the **Project Management** dialog box, click **Project Schedule**.

To	Do this
Access the project schedule from the **Production Control** module	1. In the **Production Control** dialog box, click the **Production Control** ribbon tab. 2. In the menu, select **Project Schedule**.

The **Project Schedule** dialog box opens. The same dialog box is available in the **Project Management** module. Note that the **Schedule Tasks** dialog box opens at the same time as well.



The **Project Schedule** dialog box contains multiple tabs:

- On the **Baseline Plan** tab, you can set and modify the current project baseline.
- On the **Schedule Tasks** tab, you can add, modify, move, and delete tasks that are on the project schedule.
- On the **Project Breakdown** tab, you can divide a project into sub-tasks. Usually, this is done by sequence or lot number, but it can also be done by category, sub-category, or pay category.
- On the **Gantt Chart** tab, you can view and modify the dates and completion percentages of different tasks.

For more information, see the following links:

Switch edit mode on and off (page 123)

Create, modify, and delete baseline plans (page 123)

Add, modify, and delete schedule tasks (page 130)

Add, modify, and delete breakdown items (page 137)

Apply a schedule template (page 151)

View changes in the project schedule and add savepoints (page 128)

Update the project schedule (page 152)

Add, modify, and view time tracking information (page 153)

Export the project schedule to XML format (page 158)

Modify the Gantt chart (page 143)

Create a project schedule report (page 158)

Example: Create a project schedule (page 160)

Switch edit mode on and off

When working in the **Project Schedule** dialog box, you can only make changes when you have the edit mode on. The edit mode ensures that Tekla EPM users do not make conflicting changes if they work on the project schedule simultaneously. While one has the edit mode on, no other user can make changes to the project schedule of the same project. Other users can still view the schedule.

Any time that you try to make changes to a project schedule after the timeout time has been reached, a confirmation dialog box will open, asking if you want to enter edit mode.

You can also switch the edit mode on or off by using a keyboard shortcut. Do the following:

- To switch the edit mode on, press **Ctrl+E** on the keyboard.

The edit mode will stay on until you press **Ctrl+E** again or the timeout time is reached. The timeout ensures that a user does not lock out others from making changes to the project schedule for a long period of time.

To adjust the timeout time, see Modify the project schedule settings (page 11).

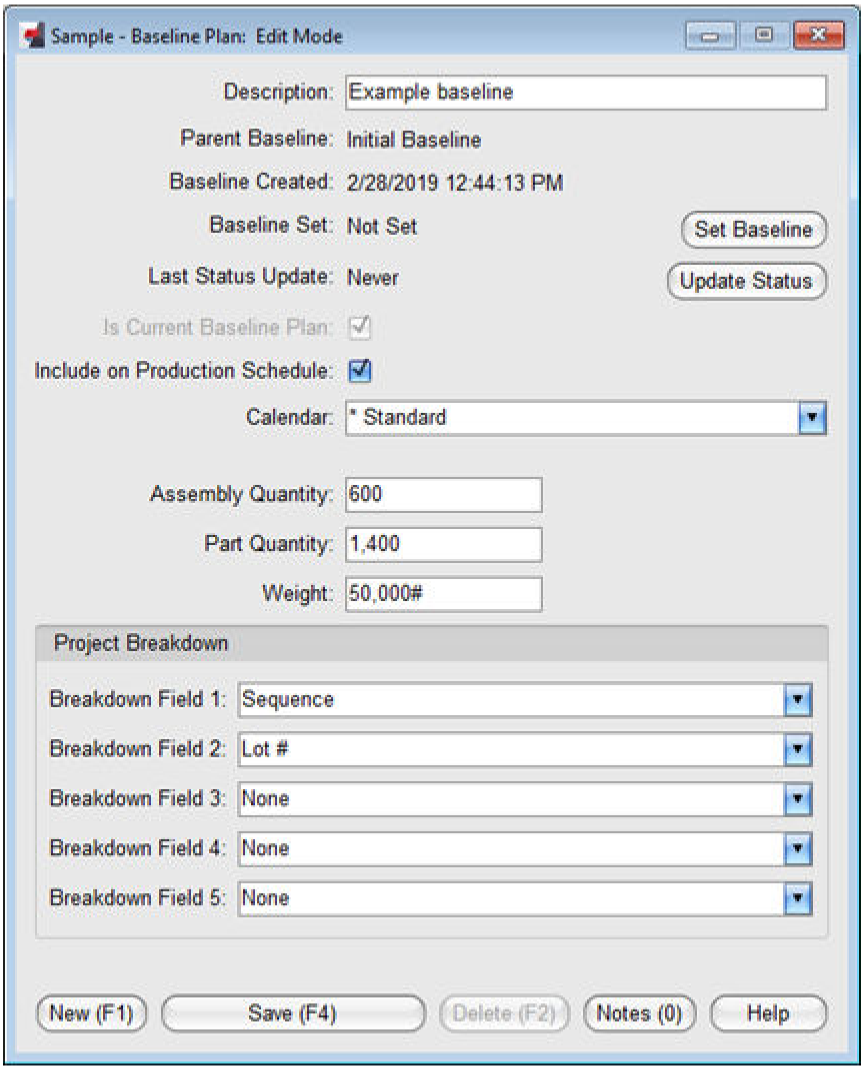
Create, modify, and delete baseline plans

A baseline plan is a listing of schedule tasks, dependencies, and estimated dates, that demonstrates the intent of a project. The actual progress is compared against the baseline plan. A project can have multiple baseline plans, so that you can explore different scenarios that show the effect that a change would have on the schedule. You can set any baseline plan as the current plan of the project at any time.

You cannot create, modify, or delete baselines if you are viewing a snapshot. For more information about snapshots, see View changes in the project schedule and add savepoints (page 128).

Create a baseline plan

1. In the **Project Schedule** dialog box, go to the **Baseline Plan** tab.
2. Click **New Baseline**.



3. In the **Description** field, type a description for the baseline plan.

   The first baseline plan will automatically be named as `Initial Baseline`, but you can modify the name according to your needs.

4. If you want to use the baseline plan as the current baseline plan, select the **Is Current Baseline Plan** check box.
5. If you want to assign resources to the baseline plan and include the baseline plan in the production schedule, select the **Include on Production Schedule** check box.

   If you do not want the baseline plan to be shown in the production schedule and resource capacity, clear the **Include on Production Schedule** check box. For example, this might be the case if the production schedule is created only for quoting.
6. Click **Add**.

   The baseline is created. You can now further modify its properties.
7. To select the calendar that determines the working days and non-working days in the project, click the arrow on the right side of the **Calendar** field and select a calendar in the list.

   To modify the available calendars, go to **Maintenance** --> **Project Management** --> **Schedule Calendars** .
8. Modify the remaining baseline properties according to your needs.

Option	Description
Assembly Quantity	The total number of assemblies in the project. This value is automatically updated when you update the status of the project schedule. Type the total number of assemblies in the **Assembly Quantity** field.
Part Quantity	The total number of parts in the project. This value is automatically updated when you update the status of the project schedule. Type the total number of parts in the **Part Quantity** field.
Weight	The total weight of the materials in the project. This value is automatically updated when you update the status of the project schedule. Type the total weight in the **Weight** field.

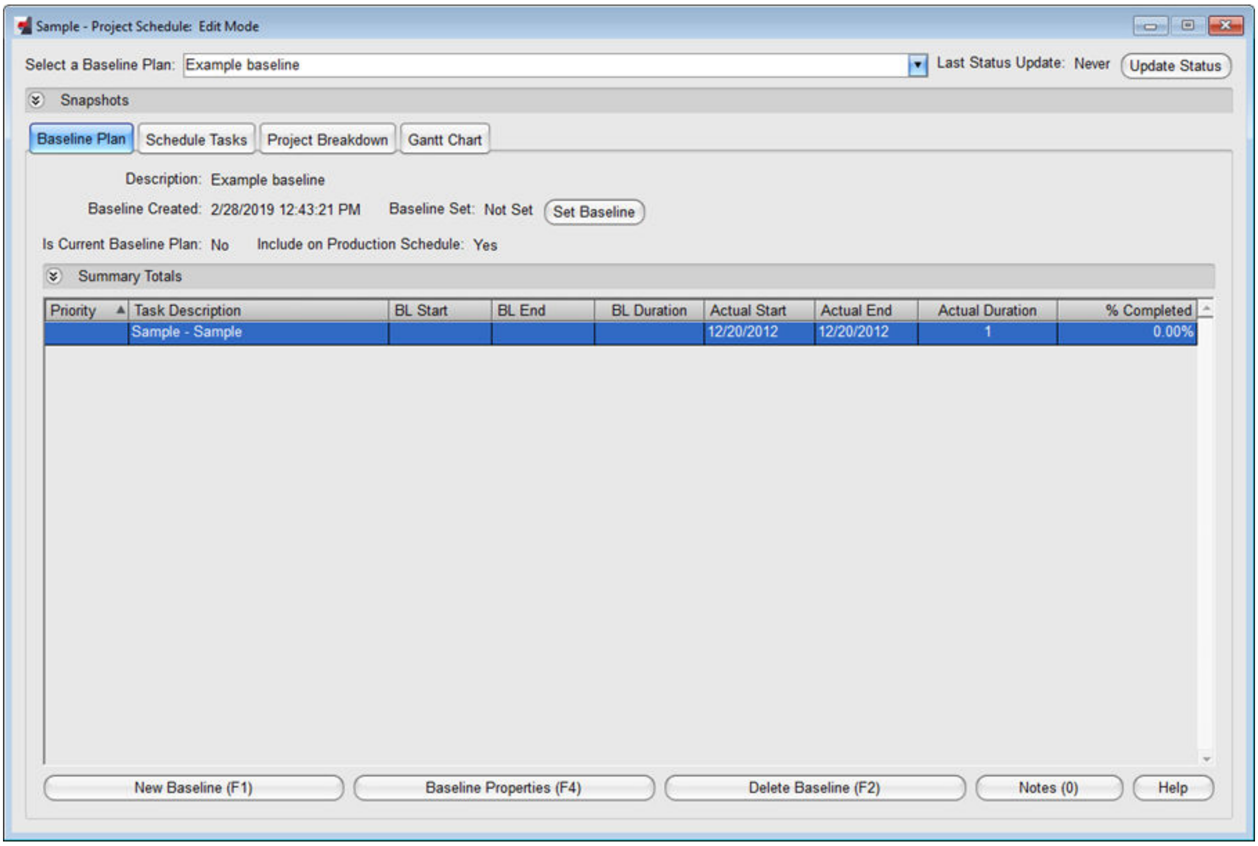
9. To define the available breakdown levels, click the arrows next to the breakdown fields in the **Project Breakdown** section of the dialog box.

   By default, two levels of breakdown items (sequences and lot numbers) are available. To make more levels available, select options in the **Breakdown Field 3**, **Breakdown Field 4**, and **Breakdown Field 5** lists. If you do not want a breakdown level to be available, select **None**.

   For example, to enable categories as the breakdown level below lots, select **Category** in the **Breakdown Field 3** list.

10. Click **Save**.

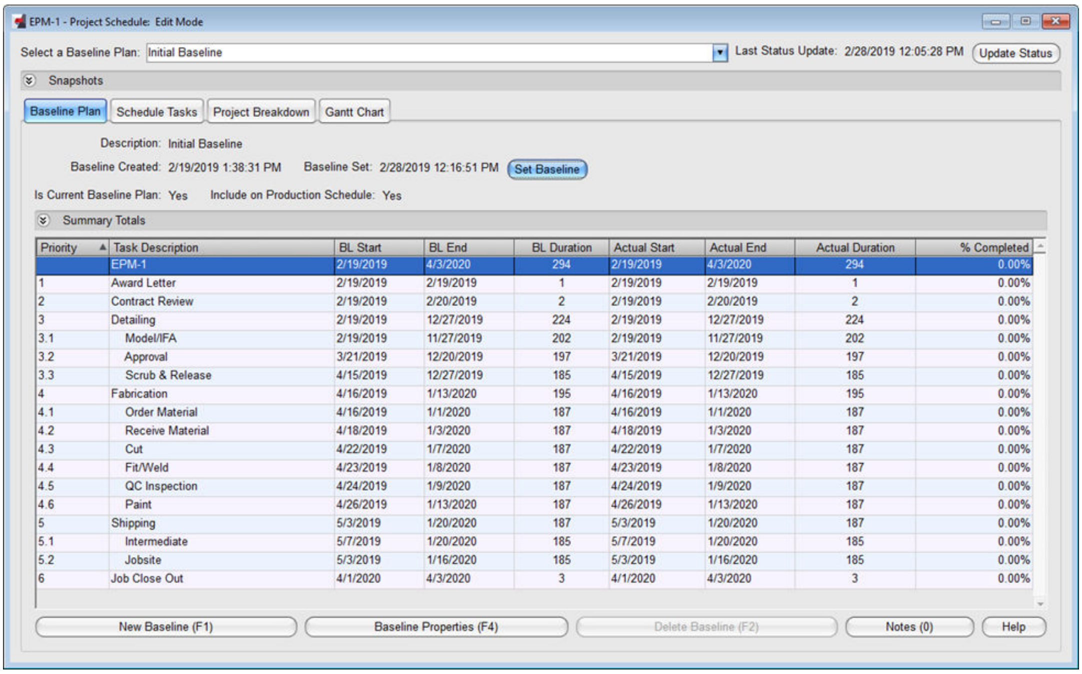
Copy the current schedule status to baseline columns



1. On the **Baseline Plan** tab, click **Set Baseline**.
2. In the confirmation dialog box, click **Yes** to set the baseline values.

The baseline is saved, and the baseline dates update in the blank columns.

Change the current baseline plan



- On the **Baseline Plan** tab, click the arrow on the right side of the **Select a Baseline Plan** field, and select the desired baseline in the list.

The new baseline plan is displayed in the **Project Schedule** dialog box.

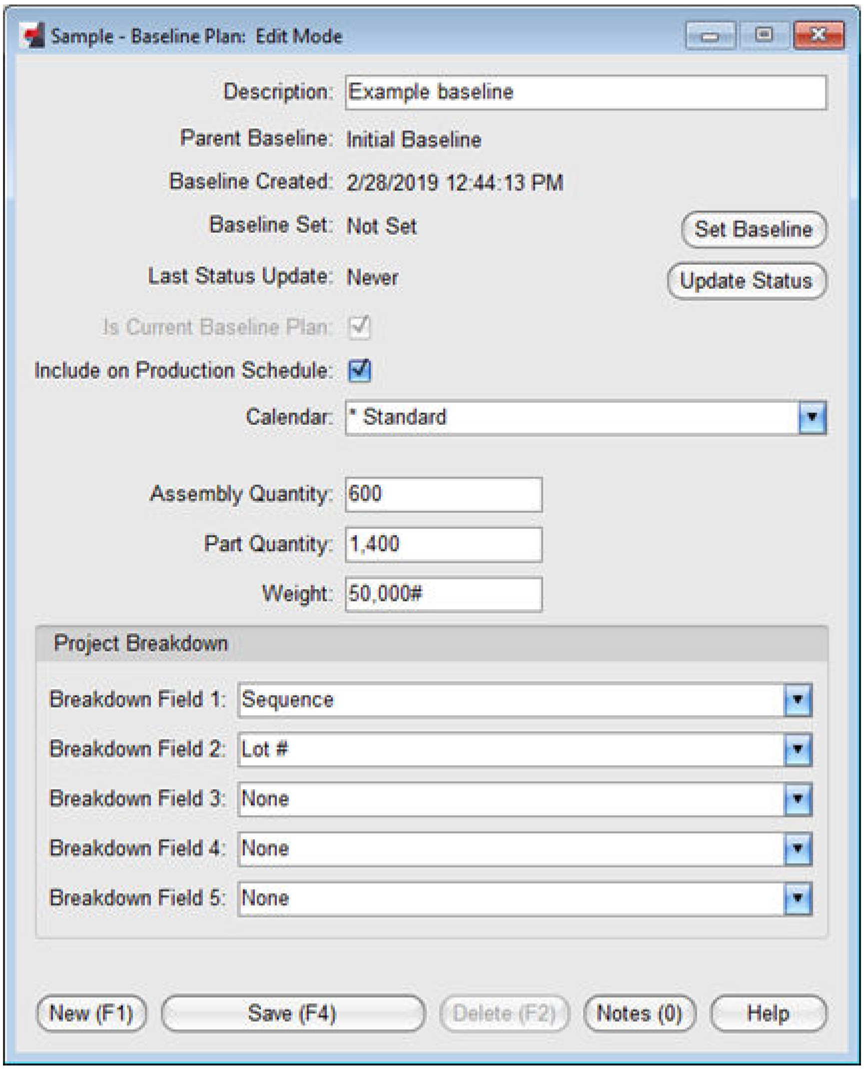
View the total values and breakdown information of the project

- To display the total values of the project, on the **Baseline Plan** tab, click the arrow on the left side of **Summary Totals**.
- To display the breakdown information of a task, select a task on **Baseline Plan** tab, and the click the arrow on the left side of **Breakdown Summary**.

  The number of breakdown items and the average assembly quantity, part quantity, and weight are displayed for the selected task.
- To select if actual total values, baseline total values, or both are displayed for the totals and the breakdown summary, click the arrow on the right side of the **Show Totals** list, and select an option in the list.

Modify a baseline plan

1. On the **Baseline Plan** tab, click **Baseline Properties**.
2. In the **Baseline Plan** dialog box, modify the baseline plan properties according to your needs.



For more information on the properties, see Create a baseline plan.

3. Click **Save** to save the changes.

Delete a baseline plan

Deleting a baseline plan is permanent and cannot be undone.

1. On the **Baseline Plan** tab, click the baseline plan that you want to delete.
2. Click **Delete Baseline**.
3. In the confirmation dialog box, click **Yes** to permanently delete the baseline.

View changes in the project schedule and add savepoints

Snapshots represent the baseline plan at previous points in time. Each time you make a change to the project schedule, Tekla EPM automatically takes a snapshot. You can then use the snapshots to compare the project schedule at two different points in time and view the impacts of changing the schedule. You can also load existing snapshots to view the project schedule at a particular point in time. If you want to mark the snapshot as a particularly important point in time, you can record it as a savepoint.

1. Click the arrow on the left side of **Snapshots** to expand the **Snapshots** section.

   You can see the currently displayed snapshot after **Currently Viewing Snapshot**. If you are viewing the current project schedule, the value will be **[Current]**.

2. Do any of the following:

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td>Load a snapshot</td><td>a. Click the arrow on the right side of the Schedule Snapshot field, and select a snapshot in the list.

If you only want the list to display the savepoints that have been recorded, select the Only Show Savepoints check box.

b. Click Load Snapshot.

The Project Schedule dialog box displays the project schedule at the selected point in time.

To view the current project schedule again, in the Schedule Snapshot list, select [Current].</td></tr>
<tr><td>Record a savepoint</td><td>a. In the Project Schedule dialog box, make any changes.

b. Click Record Savepoint.

c. In the first confirmation dialog box, click Yes to save the changes you made.

d. In the second confirmation dialog box, click Yes to confirm entering edit mode.

When you are in the edit mode, other users cannot make conflicting changes to the project schedule.

e. In the Snapshot: Edit Mode dialog box, type a description for the savepoint.

f. Ensure that the Is Savepoint check box is selected.

g. Click Save.</td></tr>
</table>

To	Do this
	h. In the third confirmation dialog box, click **Yes** to confirm entering edit mode. This way, no other user can make conflicting changes to the project schedule at the same time.

Add, modify, and delete schedule tasks

Schedule tasks are events that occur or actions that are taken during a project. In the **Schedule Tasks** dialog box, you can add, modify, and delete schedule tasks. Tasks can be organized into a hierarchy that contains main tasks and sub-tasks. In this case, the statuses of the main tasks are aggregated from the sub-tasks.

Add a task to the project schedule

1. In the **Project Schedule** dialog box, open the **Schedule Tasks** tab.
2. Click **New**.

   The **Schedule Tasks** dialog box opens. The tasks already in the schedule are displayed in the navigation tree on the left-hand pane.
3. Type a description for the new task.
4. Modify the task properties according to your needs:

   The available properties are:

Option	Description
Parent Task	If the task you are creating is a sub-task, for an existing task, you need to select the main task. Click the arrow on the right side of **Parent Task** field, and select a task in the list. If you are creating a top-level task, select **None**. Note that you cannot modify the task type, duration, or original estimate time of a main task if you add a sub-task.
Task Type	Specifies the behavior of the task on the **Gantt Chart** tab. The available task types are: • **Start/End**: an action to be performed over a period of time. Properties include the start date, end date, and duration. Start/end tasks can be directly re-sized an moved on the **Gantt Chart** tab.

Option	Description
	• **Summary**: takes the aggregate values from its sub-tasks. The start date of a summary task is automatically set to the earliest date of the sub-tasks. The end date is set to the latest sub-task end date, and the percent completed is aggregated based on the status summary method. Summary tasks cannot be re-sized on the **Gantt Chart** tab directly. However, the sub-tasks can be re-sized and moved, and the summary main task will re-sized and moved accordingly. • **Milestone**: an event in the schedule. For example, a project kickoff meeting can be a milestone task. The end date and the start date are always the same, and the duration is set to one day.
Sequence, **Lot #**, and other breakdown category check boxes	When selected, the task is divided into sub-tasks by the breakdown category. This means that you have to add the breakdown category for all items when adding them. Note that the project breakdown check boxes cannot be selected or cleared when the task has been added.
Apply Breakdown Links	When selected, the links set in the project schedule are added between sub-tasks. For example, any links set between sequences 1, 2, and 3 would be added. When cleared, the links set between sub-tasks are not added, even if they have been set in the project schedule.
Duration	The expected number of working days to complete a task. The duration can only be adjusted if the task type is set to **Start/End**. Type the number of days in the **Duration** field.
Original Estimate	The time originally estimated for the entire main task or a sub-task. The hours will automatically be distributed among the sub-tasks on the Gantt chart. Type the time in man hours in the **Original Estimate** field.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Status Link</td><td>The information that affects the status of the task when the project schedule is updated. The available options are:
Drawings Approved: the number of drawings with the Approved status.
Material Purchased: the production material that is linked to material that is either in stock or on order.
Material Received: the production material that is linked to material that is in stock.
TFS: the production material that has been cut.
Production Completed: the production material that has been assigned a route and has completed all stations in that route.
Production Progress: the production material that has been assigned a route and has completed some stations in that route.
Station Progress: the production material that has been assigned a route that includes the selected station and has completed that station.
Shipping Destination Progress: the production material that has been assigned a shipping route that includes the selected destination and has completed that destination.
Shipping Completed: the production material that has completed all assigned shipping destinations.
Click the arrow on the right side of Status Link field, and select an option in the list.</td></tr>
<tr><td>Status Summary Method</td><td>The method that determines how the percentage completed of a main task will be calculated from the sub-tasks. Each option specifies the weight that is given to each sub-task in the calculation. The available options are:
No Factor: no weight is given to the individual sub-tasks. The percentage completed of the main task is an average of the sub-tasks.
By Quantity: the percentage completed is weighed by the quantity of each sub-task.</td></tr>
</table>

Option	Description
	• **By Weight**: the percentage completed is weighed by the weight of each sub-task. • **By Duration**: the percentage completed is weighed by the duration of each sub-task. Click the arrow on the right side of **Status Summary Method** field, and select a calculation method in the list.
Resource	An object with a time-based capacity to be added on a production schedule, and the resource by which station work will be executed. Linking a task from the project schedule to a resource connects the project and production schedules. Click the arrow on the right side of **Resource** list, and select a resource in the list.
Assigned To	The Tekla EPM user that who task is assigned to.

5. Click **Add**.
6. Select the new task in the navigation tree.
7. In the **Link Tasks** section of the dialog box, define dependencies between two tasks.

   By creating links, you can make the schedule cascade from one task to another.

   Note that:

   - A task cannot link to itself.
   - A link cannot be created between a task and one of its sub-tasks.
   - Duplicate links are not allowed. There can be only one link between a pair of tasks.
   - Link cycles are not allowed. For example, if a link is created from task 1 to task 2, a link cannot be created from task 2 to task 1.
   - When you use links, and the duration of an item changes, the positions of all linked items also changes. Do not link items that need to remain static, or are independent from other items in the schedule.

   Do any of the following:

To	Do this
Add a link that ends with the current given task	Note that if a previous snapshot is displayed instead of the current project schedule information, you cannot add a predecessor link. a. Click **New Predecessor Link**.

To	Do this
	b. Click the arrow on the right side of **Link From** list, and in the list, select the starting task of the link. c. Click the arrow on the right side of upper **Position** field, and in the list, select if the link originates from the start or end of the starting task. d. Click the arrow on the right side of lower **Position** field, and in the list, select if the link ends at the start or finish of the second task. e. In the **Minimum Interval** field, type the minimum number of working days between the two tasks. The minimum interval is enforced in the Gantt chart. The later task cannot be moved earlier in the Gantt chart than the value in the **Minimum Interval** field determines. f. Click **Add**. g. In the confirmation dialog box, click **Yes**. For example, to set that shipping must start when the fabrication is finished, select **Shipping** and set the link a follows: • **Link From**: **Fabrication** • Upper **Position**: **Finish** • Lower **Position**: **Start** • **Minimum Interval**: `0 days`
Add a link that begins with the current task	Note that if a previous snapshot is displayed instead of the current project schedule information, you cannot add a successor link. a. Click **New Successor Link**. b. Click the arrow on the right side of upper **Position** field, and in the list, select if the link originates from the start or end of the starting task. c. Click the arrow on the right side of **Link To** field, and in the list, select the task that is the ending point of the link. d. Click the arrow on the right side of lower **Position** field, and in the list, select if the link ends at the start or finish of the second task.

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td></td><td>e. In the Minimum Interval field, type the minimum number of working days between the two tasks.

The minimum interval is enforced in the Gantt chart. The later task cannot be moved earlier in the Gantt chart than the value in the Minimum Interval field determines.

f. Click Add.

g. In the confirmation dialog box, click Yes.

For example, to set that shipping must start when the fabrication is finished, select Fabrication and set the link a follows:

• Upper Position: Finish
• Link To: Shipping
• Lower Position: Start
• Minimum Interval: <code>0 days</code></td></tr>
<tr><td>View and modify link properties</td><td>a. Click Link Properties.

b. Modify the starting task, ending task, the task positions, and interval according to your needs.

c. Click Save to update the link properties.</td></tr>
<tr><td>Delete a link</td><td>a. Click a link in the list to select it.

b. Click Delete Link.

c. In the confirmation dialog box, click Yes to permanently delete the links.</td></tr>
</table>

8. To save the links, click **Save**.
9. If necessary, add notes about the task:
   a. In the navigation tree on the left-hand pane, click the task to which you want to add notes.
   b. At the bottom of the dialog box, click **Notes**.
   c. In the **Notes** dialog box, click **New**.
   d. Type any notes about the task.
   e. Click **Add**.
   f. In the confirmation dialog box, click **Yes**.

g. Click the **Close** button (**X**) to close **Notes** dialog box.

Repeat the process for each task that you want to add.

Move a task earlier or later in the schedule

1. Select the task that you want to move.
2. Click the **Move Up** and **Move Down** buttons to move the task earlier or later.

Modify a task

1. In the navigation tree on the left-hand pane, click the task that you want to modify.
2. Modify the task properties and links according to your needs.

   For more information on the properties and links, see Add a link to the project schedule.
3. Click **Save** to save the changes.

Delete a task

1. In the navigation tree on the left-hand pane, click the task that you want to delete from the schedule.
2. Click **Delete Task**.
3. In the confirmation dialog box, click **Yes** to permanently delete the task.

Save schedule tasks as a schedule template

Schedule templates can contain all of the schedule items and attributes required for a typical setup. By saving a set of schedule tasks as a schedule template, you can apply the same schedule tasks in multiple jobs. The times and other details can be modified for each project, but the tasks, child tasks, and links remain the same.

1. In the **Schedule Tasks** dialog box, modify the schedule tasks to meet your needs.

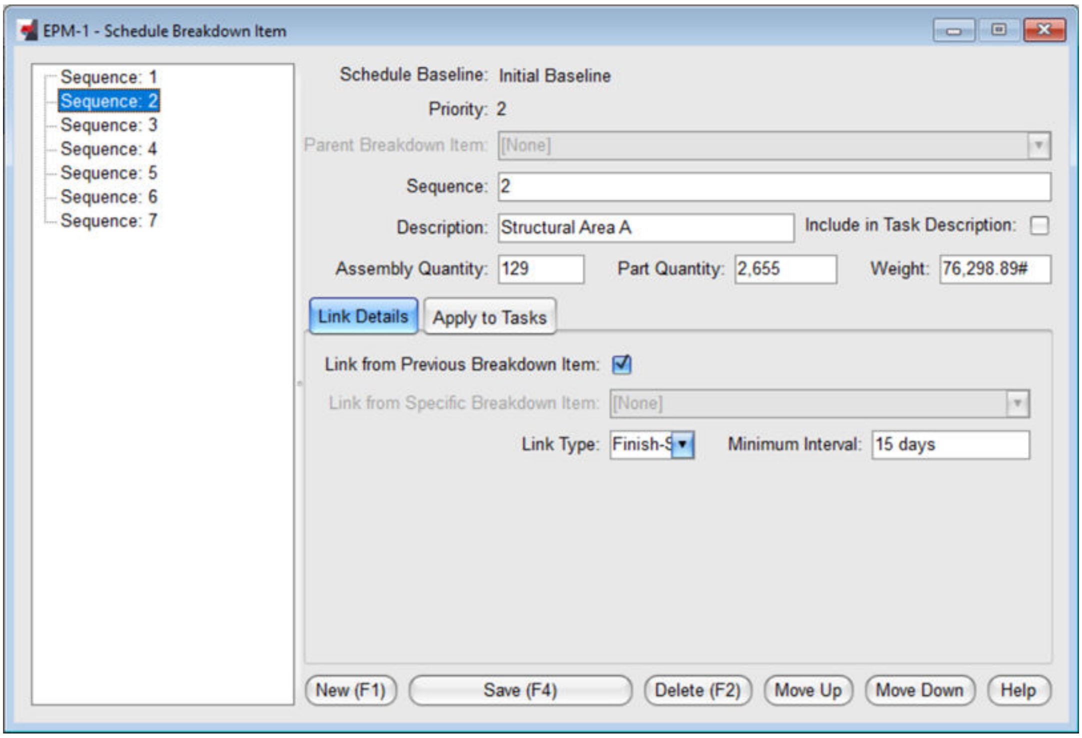
   For more information, see Add, modify, and delete schedule tasks (page 130).
2. Click the **Schedule Tasks** ribbon tab.
3. In the menu, select **Save As Template**.
4. Type a description for the template.
5. Click **OK** to save the template.

   A message opens, telling you that the template is saved.

6. Click **OK** to close the message.

Add, modify, and delete breakdown items

Schedule breakdown items allow you to divide a project into sub-tasks to schedule and track the completion of tasks. Sequences and lots are often used as breakdown items, so that tasks can be performed for each sequence and lot separately. You can add new breakdown items, modify existing ones, change the priorities of breakdown items, and delete any unnecessary breakdown items.



Add a new breakdown item

Note that if you cannot add new breakdown items if you are currently viewing a snapshot. For more information, see View changes in the project schedule and add savepoints (page 128)

1. On the **Project Breakdown** tab of the **Project Schedule** dialog box, click **New**.

2. In the **Schedule Breakdown Item** dialog box, define properties for the new breakdown item.

Option	Description
Parent Breakdown Item	If the breakdown item you are creating is a sub-item for another existing breakdown item, you need to select the main breakdown item. Click the arrow on the right side of **Parent Breakdown Item** field, and select a breakdown item in the list. If you are creating a top-level breakdown item, select **None**. Note that the main breakdown item cannot be changed after the breakdown item is added.
Sequence, **Lot #**, **Category**, **Sub-Category**, **Pay Category**	The breakdown value that associates the breakdown item with the relevant project data. Note that the breakdown value must match the project data exactly. For example, in the **Sequence** field, the sequence must be exactly the same as in the production control job. Otherwise, the project data cannot be updated properly. Type the breakdown value in the field.
Description	The description of the breakdown item. For example, `First floor beams and columns`. Type a description in the **Description** field.
Include in Task Description	When selected, the breakdown item description will be included in the task description in addition to the breakdown value. For example, if the description of sequence 6 is `Third Floor Beams`, and the **Include in Task Description** check box is selected, the description of the resulting task in the Gantt chart will be `Sequence: 6 - Third Floor Beams`. Instead, if the **Include in Task Description** check box is cleared, then the description of the task in the Gantt chart will be `Sequence: 6`.
Assembly Quantity	The total number of assemblies associated with the breakdown item. This value is automatically updated when you update the project schedule status. Type the total number of assemblies in the **Assembly Quantity** field.
Part Quantity	The total number of parts associated with the breakdown item. This value is automatically

Option	Description
	updated when you update the project schedule status. Type the total number of parts in the **Part Quantity** field.
Weight	The total material weight associated with the breakdown item. This value is automatically updated when you update the project schedule status. Type the total weight in the **Weight** field.

3. Click the **Apply to Tasks** tab to open it.
4. To select the schedule tasks to which the breakdown item is applied, do one of the following:
   - To apply the breakdown item to all schedule tasks, select the **All** check box.
   - To only apply the breakdown item to specific schedule task, click **Select**, use the arrow buttons to move the desired tasks to the **Included** list, and click **OK**.

   When you apply the breakdown item to a task, the task becomes a summary task with sub-tasks automatically created under it for each sub-item.
5. Do the following to determine which links will be applied between the sub-tasks:
   a. Do one of the following:
      - To create a link from the previous breakdown item to the current one, select the **Link from Previous Breakdown Item** check box.

        The **Link from Previous Breakdown Item** cannot be selected if the current breakdown item is the first breakdown item or the first sub-item under a main breakdown item.
      - To create a link from any previous breakdown item with the same main breakdown item to the current one, click the arrow on the right side of the **Link from Specific Breakdown Item** field, and select a breakdown item in the list.

        Links will be created from the sub-task associated with that breakdown item.

   b. Click the arrow on the right side of the **Link Type** field and select a link type in the list.

      The options are:
      - **Start-Start**
      - **Finish-Start**

- **Start-Finish**
- **Finish-Finish**

c. In the **Minimum Interval** field, type the minimum number of working days between the two sub-tasks.

For example, to create a link from the start of a sequence to the start of a second sequence, the second sequence starting 5 working days after the previous one, you should set the link details as follows:

- **Link Type**: **Start-Start**
- **Minimum Interval**: `5 days`

6. Click **Add**.

The breakdown item and its link details are added to the project schedule. You can see the breakdown item in the navigation tree on the left side of the dialog box.

Modify a breakdown item

You cannot modify breakdown items if you are currently viewing a snapshot. For more information, see View changes in the project schedule and add savepoints (page 128).

1. On the **Project Breakdown** tab of the **Project Schedule** dialog box, click the breakdown item that you want to modify.
2. Click **Properties**.
3. Modify the properties of the breakdown item according to your needs:

Option	Description
Sequence, **Lot #**, **Category**, **Sub-Category**, **Pay Category**	The breakdown value that associates the breakdown item with the relevant project data. Note that the breakdown value must match the project data exactly. For example, in the **Sequence** field, the sequence must be exactly the same as in the production control job. Otherwise, the project data cannot be updated properly. Type the breakdown value in the field.
Description	The description of the breakdown item. For example, `First floor beams and columns`. Type a description in the **Description** field.
Include in Task Description	When selected, the breakdown item description will be included in the task description in addition to the breakdown value. For example, if the description of sequence 6 is `Third Floor Beams`, and the **Include in Task**

Option	Description
	Description check box is selected, the description of the resulting task in the Gantt chart will be `Sequence: 6 - Third Floor Beams`. Instead, if the **Include in Task Description** check box is cleared, then the description of the task in the Gantt chart will be `Sequence: 6`.
Assembly Quantity	The total number of assemblies associated with the breakdown item. This value is automatically updated when you update the project schedule status. Type the total number of assemblies in the **Assembly Quantity** field.
Part Quantity	The total number of parts associated with the breakdown item. This value is automatically updated when you update the project schedule status. Type the total number of parts in the **Part Quantity** field.
Weight	The total material weight associated with the breakdown item. This value is automatically updated when you update the project schedule status. Type the total weight in the **Weight** field.

4. Click the **Apply to Tasks** tab to open it.
5. To modify the schedule tasks to which the breakdown item is applied, do one of the following:
   - To apply the breakdown item to all schedule tasks, select the **All** check box.
   - To only apply the breakdown item to specific schedule task, click **Select**, use the arrow buttons to move the desired tasks to the **Included** list, and click **OK**.
6. Do the following to modify which links will be applied between the sub-tasks:
   a. Do one of the following:
      - To create a link from the previous breakdown item to the current one, select the **Link from Previous Breakdown Item** check box.

        The **Link from Previous Breakdown Item** cannot be selected if the current breakdown item is the first breakdown item or the first sub-item under a main breakdown item.
      - To create a link from any previous breakdown item with the same main breakdown item to the current one, click the arrow on the

right side of the **Link from Specific Breakdown Item** field, and select a breakdown item in the list.

Links will be created from the sub-task associated with that breakdown item.

b. Click the arrow on the right side of the **Link Type** field and select a link type in the list.

The options are:

- **Start-Start**
- **Finish-Start**
- **Start-Finish**
- **Finish-Finish**

c. In the **Minimum Interval** field, type the minimum number of working days between the two sub-tasks.

7. Click **Save** to update the breakdown item properties.

Change the priority of a breakdown item

Moving breakdown items up or down in the list changes their priority. If you move a breakdown item up, its priority is swapped with the previous breakdown item, whereas if you move a breakdown item down, its priority is swapped with the following breakdown item. For example, moving an item with the priority 1.3 up would change its priority to 1.2.

You cannot move breakdown items up or down if you are currently viewing a snapshot. For more information, see View changes in the project schedule and add savepoints (page 128).

1. On the **Project Breakdown** tab of the **Project Schedule** dialog box, click the breakdown item that you want to move.
2. Click the **Move Up** and **Move Down** buttons.
3. In the confirmation dialog box, click **Yes** to confirm moving the breakdown item.

Delete a breakdown item

Note that deleting a breakdown item is permanent and cannot be undone. All sub-items of the selected breakdown item are deleted as well.

You cannot delete a breakdown item if you are currently viewing a snapshot. For more information, see View changes in the project schedule and add savepoints (page 128).

1. On the **Project Breakdown** tab of the **Project Schedule** dialog box, click the breakdown item that you want to delete.
2. Click **Delete**.

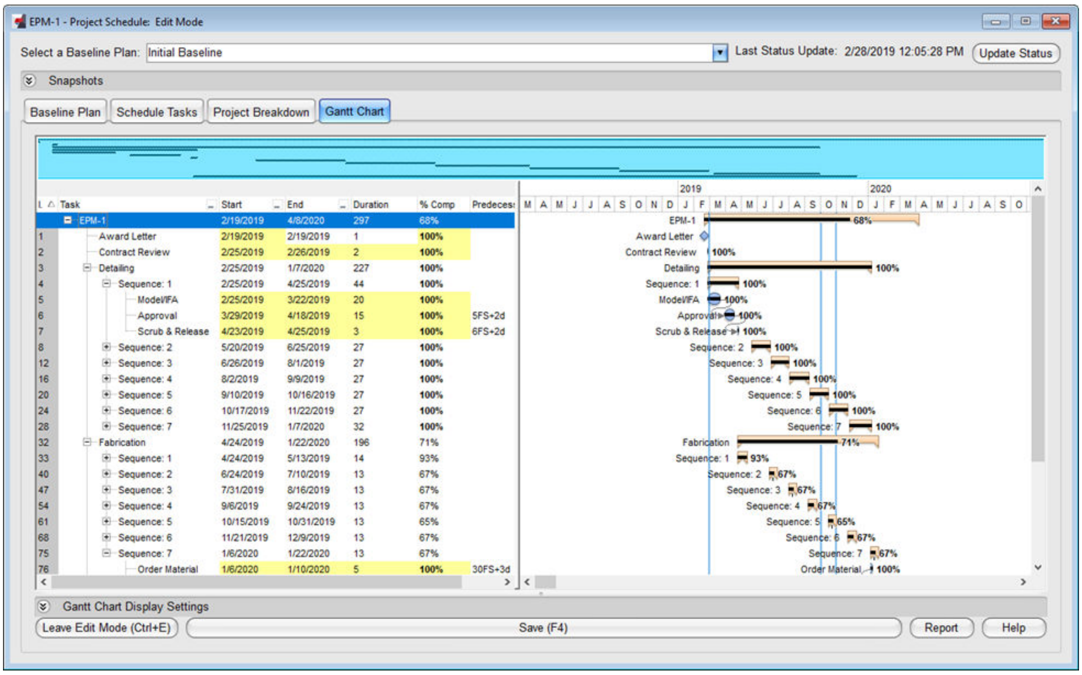
3. In the confirmation dialog box, click **Yes** to permanently delete the breakdown item.

Modify the Gantt chart

The chart on the **Gantt Chart** tab of the **Project Schedule** dialog box gives you a visual representation of the schedule. You can modify the view of the Gantt chart according to your needs by including and excluding items, and scaling the chart. You can also move the tasks in the Gantt chart to move them earlier or later in the project schedule.

To modify the Gantt chart, do the following:

1. In the **Project Schedule** dialog box, click the **Gantt Chart** tab to open it.
2. To enable modifying the information, click **Enter Edit Mode** at the lower-left corner, or press **Ctrl+E** on the keyboard.



In the Gantt chart, you can see the following information:

- The left side of the tab shows the properties of schedule tasks.
- The right side of the tab shows the schedule tasks visually as bars on the time line.

  The tasks look different and behave differently depending on their task type:

  - **Summary** tasks (or main tasks) are displayed as orange bars. A summary task cannot be re-sized directly. Instead, you can re-size and move the sub-tasks to change the duration or dates of the summary task. When a summary task is moved earlier or later, the sub-tasks are moved by the same number of days.

  - **Start/End** tasks are displayed as blue bars. **Start/End** tasks can be re-sized and moved in the Gantt chart.
  - **Milestone** tasks are displayed as blue diamonds. Milestones can be moved in the Gantt chart, but they cannot be re-sized.

- Links between tasks are represented by arrows from the predecessor tasks to the successor tasks.
- Any cells that are highlighted with yellow can be modified.

Right-click anywhere in the Gantt chart to find shortcuts to more commands:

- **Goto Task**: Zooms to the beginning of the bar of the selected task.
- **Time Tracking Summary**: Opens the **Time Tracking Summary** dialog box. For more information, see Add, modify, and view time tracking information (page 153).
- **Time Tracking Detail**: Opens the **Time Tracking Detail** dialog box. For more information, see Add, modify, and view time tracking information (page 153).
- **Time Tracking Input**: Opens the **New Time Tracking Record** dialog box. For more information, see Add, modify, and view time tracking information (page 153).
- **Production Schedule**: Allows you to view the production schedule. For more information, see .
- **Date Filter**: Allows you to select a date range that you want to see in the Gantt chart. When you apply the filter, tasks that are at least partially within the entered date range will be visible.
- **Scale chart to** options: Scale the Gantt chart to day, week, or month, according to your needs.
- **Show Links**/**Hide Links**: Shows or hides the links between tasks.
- **Show Overview**/**Hide Overview**: Shows or hides the overview section above the Gantt chart.
- **Expand All**: Expands all summary tasks so that all sub-tasks are visible.
- **Expand Summary**: Expands the task hierarchy so that all summary tasks are visible. sub-tasks are not displayed.
- **Expand Level**: Expands the selected task and other tasks with the same main task.
- **Collapse All**: Collapses all summary tasks.
- **Save Image**: Allows you to save the Gantt chart as a single image file.

Modify the dates of tasks

1. Do one of the following:
   - Click the **Start** or **End** cell of the task, and select a date in the calendar.
   - Click the task bar, hold down the left mouse button, drag the task earlier or later in the schedule, and release the left mouse. button

   Note that:

   - If the task has one or more predecessor links, the bar cannot be moved earlier than the predecessor tasks and link intervals determine.
   - If the task has one or more successor links, when the task is moved later, the successor tasks will also be moved later, if that is necessary to maintain the link interval.

   Repeat this process for all tasks to move them in the correct locations.
2. Click **Save**.

Modify the duration of tasks

1. Do one of the following:
   - Click the **Duration** cell of the task and type a new value in the cell.
   - Hover the mouse pointer over the beginning or the end of the task bar until a two-headed arrow appears, drag the start or end position of the bar earlier or later, and release the mouse button.

   Note that:

   - If the task has one or predecessor links, the bar cannot be changed to start earlier than the predecessor tasks and link intervals determine.
   - If the task has one or more successor links, when the task is changed to end earlier, any successor tasks will be moved earlier by the same number of days in order to keep their relative position the same.
   - If the task has one or more successor links, when the task is changed to end later, the successor tasks will be moved later, if that is necessary to maintain the link interval.
2. Click **Save**.

Modify task properties

On the left side of the Gantt chart, you can modify the task properties, such as the duration, completion percentage, or used resource.

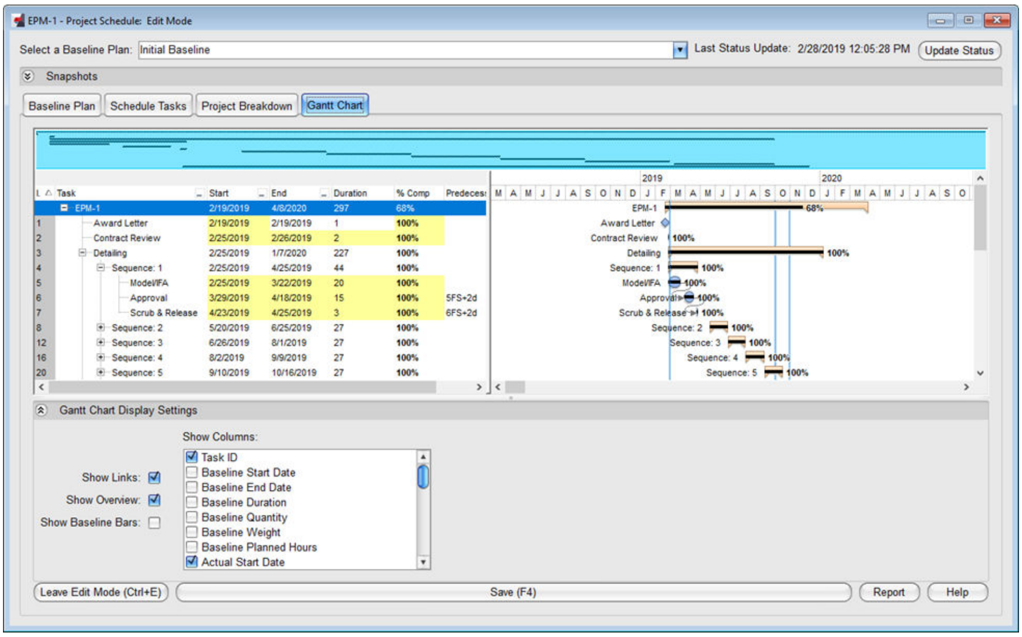
Note that only cells that are highlighted with yellow can be modified.

1. On the left side of the dialog box, click a cell of the task.
2. Modify the value in the cell according to your needs.

3. Click **Save** to update the project schedule.

Modify display settings

1. Click the arrow on the right side of **Gantt Chart Display Settings** to expand the display settings.



2. Modify the following options according to your needs:

Option	Description
Task ID	The unique identifier of the task in the project schedule.
Baseline Start Date, Baseline End Date	The start and end dates of the task when the baseline was set. If the baseline has not been set, the **BL Start** and **BL End** cells are blank.
Baseline Duration	The duration of the task when the baseline was set. If the baseline has not been set, the **BL Duration** cells are blank.
Baseline Quantity	The quantity of the task when the baseline was set. If the baseline has not been set, the **BL Quantity** cells are blank.
Baseline Weight	The weight of the task when the baseline was set. If the baseline has not been set, the **BL Weight** cells are blank.

Option	Description
Baseline Planned Hours	The total planned hours of the task when the baseline was set. If the baseline has not been set, the **BL Hours** cells are blank.
Actual Start Date	The actual start date of the task in the project schedule. To change the start date, click the arrow on the right side of the **Start** cell, and select a date in the calendar. When you change the start date, the task will move to the selected date in the Gantt chart. The duration of the task will remain the same, so the task will not be resized.
Actual End Date	The actual end date of the task in the project schedule. To change the end date, click the arrow on the right side of the **End** cell, and select a date in the calendar. When you change the end date, the duration of the task will change accordingly in the Gantt chart, and the task will be re-sized.
Actual Duration	The actual duration of the task in the project schedule. To change the duration, type a new value in the **Duration** cell. When you change the duration, the end task of the task will change accordingly in the Gantt chart, and the task will be re-sized.
Actual Quantity	The quantity related to the task in the bill of materials. This value is set when you update the project schedule (page 152).
Actual Weight	The weight related to the task in the bill of materials. This value is set when you update the project schedule (page 152).
Percent Completed	The percentage of the task that is completed. To change the percentage, click the **% Comp** cell and type a percentage in the cell. When you change the percentage, the percentage completed of the main tasks will automatically be

Option	Description
	updated based on the summary status method task setting. For more information, see Add, modify, and delete schedule tasks (page 130).
Original Estimate	The number of original estimate hours applied to the task. If the task is divided by sequences, lots, or other breakdown fields, the hours will be distributed to the resulting tasks on the Gantt Chart, weighed by duration. To adjust the original estimate hours, click the **Orig. EST** cell and type the number of hours in the field. When you adjust the original estimate hours, the adjusted number of hours will appear in italics in the Gantt Chart. The remaining hours will be redistributed among the tasks that have not been manually adjusted. You can return to the automatic distribution of hours by clearing the value in the **Orig. EST** cell.
Unreleased Hours	The number of original estimate hours that have not yet been released, calculated by the **Percent Released** value. For example, if the original estimate is 500 hours and the task is 20% released, the number of unreleased hours will be 400.
Planned Hours (**Base Hours**)	The planned hours that have been released. Tasks that have the **Status Link** option selected will have this field updated automatically when the project schedule status is updated (page 152). For more information, see Add, modify, and delete schedule tasks (page 130).
Adjustment Hours	Allows you to manually adjust the planned hours. To adjust the number of planned hours, click the **Adjustment** cell, and type a value.
Percent Released	The percentage of the original estimate hours that have been released and that appear in the **Base Hours** field. This field will update automatically when the planned hours are updated. For example, if the original estimate is 500 hours and the planned hours is updated to 100 hours, the percentage released is 20%. This will in turn update the unreleased hours to 400.

Option	Description
	Once all material associated with a task has been released, the percent released may need to be manually adjusted, so that no further unreleased hours are included in the total planned hours. Let's say that a task is broken out into 4 sequences and the original estimate is 2,000 hours. If all 4 sequence tasks have the same duration, each one will receive 500 of the original estimate hours. The drawings are submitted for sequence 1, and after the next status update, the planned hours are set to 100 hours, which will update the percent released to 20%. Since Tekla EPM does not know if we have received all of sequence 1, the remaining unreleased hours will still be included in the total planned hours calculation. If everything has in fact been received for sequence 1, you can manually set the percent to 100%, so that no further unreleased hours will be included in the total planned hours. To adjust the percentage, click in the **% Released** cell, and type a percentage in the cell. When you manually adjust the released hours, the number will appear in italics. When you have manually adjusted the percentage released, the value will not be automatically adjusted according to any changes made to the planned hours. To return to the automatic calculated value, clear the value in the cell.
Total Planned Hours (**Plan Hours**)	The total number of the unreleased hours, planned hours, and adjustment hours for the task.
Linked Hours	The number of hours updated according to the **Status Link** option. For example, the **Production Progress**, **Production Completed**, and **Station Progress** options will update the linked **Linked Hours** with the hours entered in **Piece Tracking**. For more information, see Add, modify, and delete schedule tasks (page 130). To adjust the number of linked hours, click the **Linked Hours** cell, and type the number of hours.
Regular Hours	The regular hours associated with the task, entered in time tracking. For more information, see Add, modify, and view time tracking information (page 153).
Overtime Hours	The overtime and double overtime hours associated with the task, entered in time tracking.

Option	Description
	For more information, see Add, modify, and view time tracking information (page 153).
Total Hours	The total hours worked on the task, coming from either the linked hours or the regular and overtime hours from time tracking. To ensure that the time is not duplicated, the time tracking hours override the linked hours. If the number of either regular or overtime hours is greater than zero, the total hours will be set to the regular hours plus the overtime hours. If the number of both regular and overtime hours is zero, the total hours will be set to the linked hours.
Utilization Percent	The utilization percentage is calculated as the percentage of the total hours compared to the total planned hours. For example, if the number of total planned hours is 500 and the number of total hours is 200, the utilization percentage will be 40%. If the utilization percentage is over 5% greater than the percentage of the task completed, the utilization percentage will be highlighted in red. In this example, if the percent completed is 35% or less, the utilization percentage of 40% will be highlighted in red.
Assigned to User	The user who is responsible for the task. For more information, see Add, modify, and delete schedule tasks (page 130). To change the assigned user, click the arrow on the right side of the **Assigned To** cell and select a user in the list.
Resource	The resource that the task has been assigned to for production scheduling purposes. For more information, see Add, modify, and delete schedule tasks (page 130) and. To change the resource, click the arrow on the right side of the **Resource** cell and select a resource in the list.
Predecessors	The linked tasks that are immediate predecessors of the task.
Successors	The linked tasks that are immediate successors of the task.
Show Links	When selected, Tekla EPM shows task links as arrows in the Gantt chart.

Option	Description
Show Overview	When selected, Tekla EPM shows the overview section above the Gantt chart.
Show Baseline Bars	When selected, Tekla EPM shows the baseline dates as a yellow bar on the Gantt chart as set when the baseline was set. The baseline overlay bars will not be shown if: • The baseline has not been set. • The task has the same start and end dates as the baseline dates. • The task has been added after the baseline was set.

3. Click **Save** to update the Gantt chart.

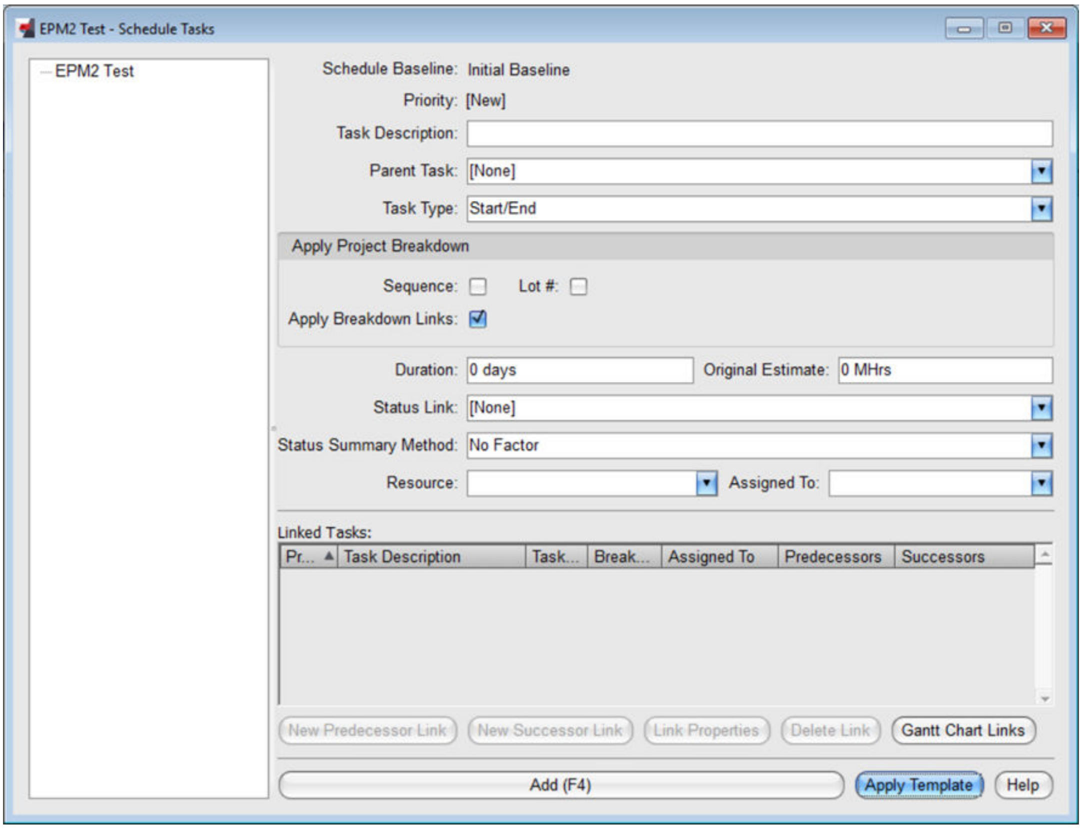
Print a Gantt chart report

You can create and print a report that is an exact copy of the Gantt chart. Note that all content that you have selected in the **Gantt Chart Display Settings** section will be visible in the report as well.

1. At the lower-right corner of the **Gantt Chart** tab, click **Report**.
2. In the **Print Review** dialog box, click **Setup...** and adjust the paper size, orientation, margins, and printer properties according to your needs.
3. Click **Print**.
4. When the report has been printed, click **Close** to close the **Print Review** dialog box.

Apply a schedule template

Schedule templates can contain all of the schedule items and attributes required for a typical setup. Existing schedules can be saved as templates, and then applied to a new job using the **Apply Template** button. The schedule can always be modified to fit the project requirements.



To create a schedule template, see Create, modify, and delete schedule templates (page 12).

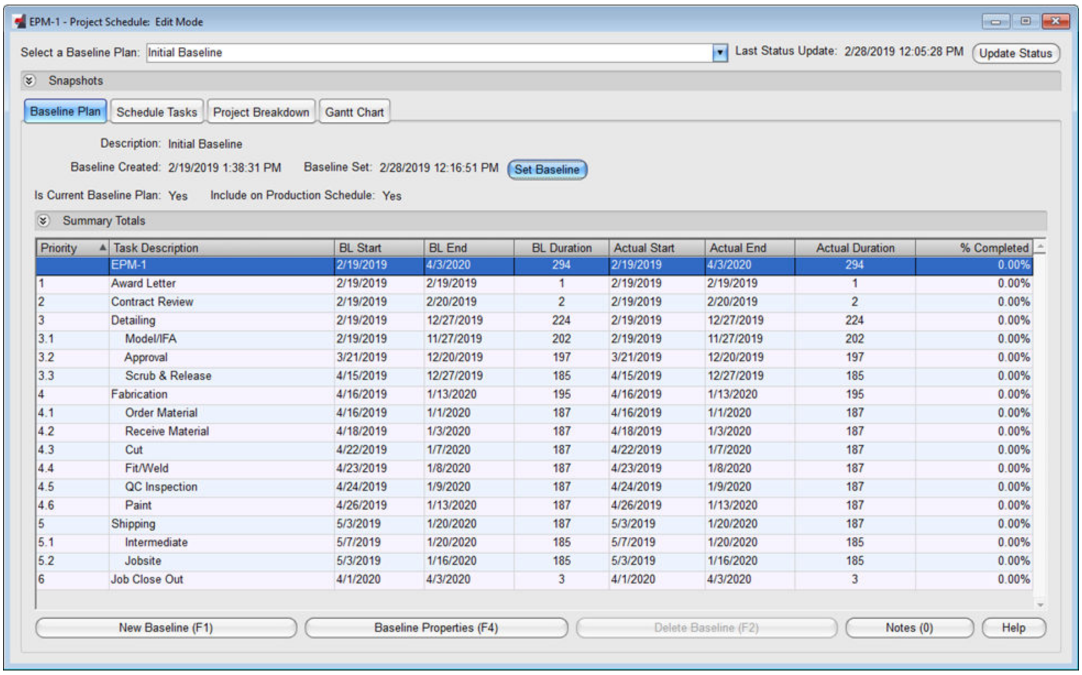
1. Open the **Schedule Tasks** dialog box.
2. In the lower-right corner, click **Apply Template**.
3. In the **Enter Value** dialog box, click the arrow on the right side of the field, and select the schedule template that you want to use.
4. Click **OK**.

   The schedule template is now applied to the project schedule.
5. Click the **Close** button (**X**) to close the **Schedule Tasks** dialog box.

Update the project schedule

When you update a project schedule, Tekla EPM collects all time and progress status information on the current project in **Production Control**, **Project Management**, and **Purchasing**. Once the update process is ready, all activity is updated to the chart on the **Gantt Chart** tab. For example, if drawings have been submitted and approved, the percentage completed for drawing submittal will update.

You can see the last time the project schedule was updated in the upper-right corner of the **Project Schedule** dialog box, after **Last Status Update**.



1. In the upper-right corner of the **Project Schedule** dialog box, click **Update Status**.

   The **Status Update** dialog box opens, displaying the progress of the update process.

2. Once the update is completed, click the **Close** button (**X**) to close the **Status Update** dialog box.

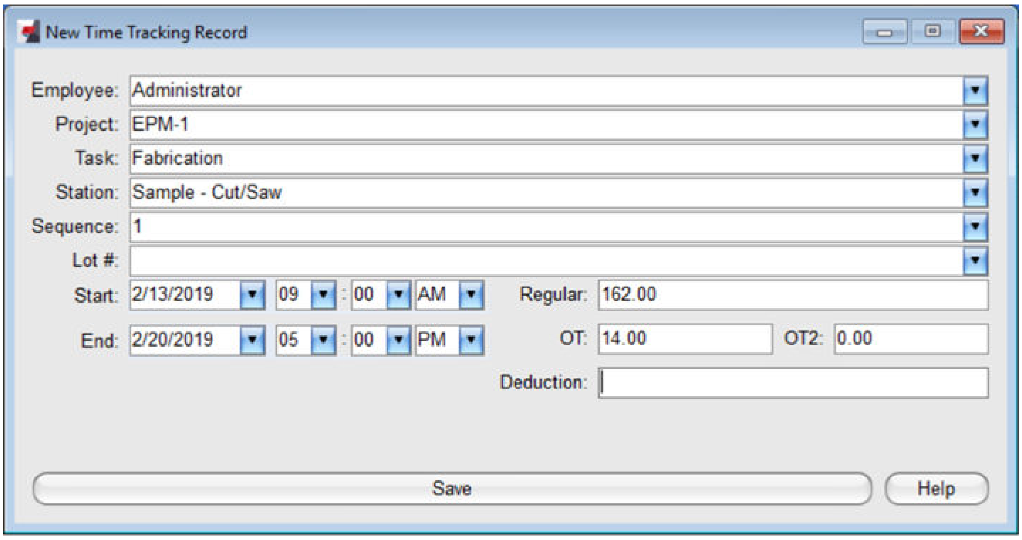
Add, modify, and view time tracking information

Use the time tracking commands to add time tracking records to a project schedule, and to view and modify the existing time tracking records.

To adjust the time tracking settings, see Define time tracking settings (page 164).

Add a time tracking record

1. In the **Project Schedule** dialog box, click the **Project Schedule** ribbon tab.
2. In the menu, select **Time Tracking Input**.



3. In the **New Time Tracking Record** dialog box, define the following properties:

Option	Description
Employee	The Tekla EPM user who is adding the record. Tekla EPM automatically uses the user that is logged in, but you can select another user as well. Note that the **Employee** field is optional. If you do not want the hours entered to be applied to a specific employee, you can leave the field blank. Click the arrow on the right side of **Employee** field, and select a user in the list.
Project	The project management job for which you are adding the time record. Click the arrow on the right side of **Project** field, and select a project management job in the list.
Task	The schedule task for which you are adding the time record. The **Task** field is optional. If you leave the field blank, the time record will be applied to the project as a whole. Click the arrow on the right side of **Task** field, and select a schedule task in the list.

Option	Description
Station	The station for which you are adding the time record. The **Station** field is optional. If you leave the field blank, the time record will be applied to the project as a whole. Click the arrow on the right side of **Station** field, and select a station in the list.
Sequence	The sequence for which you are adding the time record. The **Sequence** field is optional. If you leave the field blank, the time record will be applied to the project as a whole. Click the arrow on the right side of **Sequence** field, and select a sequence in the list.
Lot #	The lot for which you are adding the time record. The **Lot #** field is optional. If you leave the field blank, the time record will be applied to the project as a whole. Click the arrow on the right side of **Lot #** field, and select a lot number in the list.

4. Click the arrows on the right side of the **Start** and **End** fields, and select the start and end dates and times in the calendar.

   Tekla EPM automatically calculates the number of working hours. The calculation method that is used can be set in **Time Tracking Settings**.

5. If necessary, modify the working hours according to your needs:

   a. In the **Regular** field, type the time that will be logged as regular hours for the project, or task, station, sequence, or lot.

   b. In the **OT** and **OT2** fields, type the time that will be logged as overtime and double overtime hours for the project, or task, station, sequence, or lot.

   c. In the **Deduction** field, type the time used for unpaid activities, such as lunch. This time will not be logged against the project, ask, station, sequence, or lot.

   If the start and end times and the hours that you added do not match, you can adjust the difference by double-clicking the field where you added hours. For example, if the difference between the start and end time is 2 hours and you enter 1.50 for regular hours, double-clicking on the **OT** field will set its value to 0.50.

   If the total hours are less than the difference between the start and end time, the difference will automatically be added as deduction hours.

6. Click **Save**.

The record is added.

Note that Tekla EPM does not save the record if:

- Two time tracking records marked to the same Tekla EPM user overlap.
- A Tekla EPM user is selected and the total sum of regular, overtime, and double overtime hours is greater than the difference in the start and end time.

Modify, delete, or import time tracking records

1. In the **Project Schedule** dialog box, click the **Project Schedule** ribbon tab.
2. In the menu, select **Time Tracking Detail**.
3. In the **Time Tracking Filters** dialog box, click the arrows on the right side of fields in the **Start Date** and **End Date** sections, and select the minimum and maximum start and end dates in the calendars.
4. To only view and modify specific time tracking records, click the available filtering buttons.
5. In the filter dialog box, click the arrow buttons to move the values that you want to include to the **Included** list.
6. Click **OK**.
7. Click **Apply Filter**.

   The **Time Tracking Detail** dialog box opens, displaying all previously created time tracking records.

   To only view records that match particular criteria, you can select items in the navigation tree on the left.
8. Do any of the following:

To	Do this
Modify a time tracking record	a. Click **Properties**. b. Modify the properties of the time tracking record. For more information, see Add a time tracking record. c. Click **Save** to update the time tracking record.
Import time tracking records	a. Click the **Time Tracking Detail** ribbon tab. b. In the menu, select **Import Time Tracking Records - Excel**. c. In the **Open** dialog box, browse to find the file that you want to import.

To	Do this
	d. Double-click the file. e. In the **Verify Excel Import Data** dialog box, verify the time tracking information. f. If you want to exclude a row in Microsoft Excel, hold down **Alt** and double-click a row. g. Click **OK**. h. In the **Import Field Map** dialog box, click an import field in the list. i. Select the corresponding field in the **Tekla EPM Field** list and click **Set Field Mapping**. j. Click **OK**. The import starts. k. When the import is completed, click **Open Import Log** and view the import details. l. Click the **Close** button (**X**) to close the import log and the **Import** dialog box.
Delete time tracking records	Note that deleting time tracking records is permanent and cannot be undone. a. In the **Time Tracking Detail** dialog box, click the time tracking records that you want to delete. To select multiple items, hold down **Ctrl**. To select a range of subsequent items, hold down **Shift**. b. Click the **Time Tracking Detail** ribbon tab. c. In the menu, select **Delete Selected Records**. d. In the first confirmation dialog box, click **Yes**. e. In the second confirmation dialog box, click **Yes** to permanently delete the tracking records.

View a time tracking summary

1. In the **Project Schedule** dialog box, click the **Project Schedule** ribbon tab.
2. In the menu, select **Time Tracking Summary**.
3. In the upper-left corner of the **Time Tracking Filters** dialog box, select the fields that you want to view in the time tracking summary.

   The selected fields will be columns in the summary.

4. Click the arrows on the right side of fields in the **Start Date** and **End Date** sections, and select the minimum and maximum start and end dates in the calendars.
5. To only view and modify specific time tracking records, click the available filtering buttons.
6. In the filter dialog box, click the arrow buttons to move the values that you want to include to the **Included** list.
7. Click **OK**.
8. Click **Apply Filter**.

   The dialog box opens, displaying a summary of the time tracking records created.
9. View the time tracking information.
10. Do any of the following:
    - To create a new time tracking record, click **New**.

      For more information, see Add a time tracking record.
    - To access the **Time Tracking Detail** dialog box, click **Time Tracking Detail**.

      For more information, see Modify, delete, or import time tracking records.
    - To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

Export the project schedule to XML format

You can export the project schedule and save it in the desired folder as an XML file. You can select from two XML options: either the option used in Primavera, or the option used in Microsoft Projects.

1. In the **Project Schedule** dialog box, click the **Project Schedule** ribbon tab.
2. In the menu, select **Export**, and then, select the preferred XML option.
3. In the **Save As** dialog box, browse to the folder where you want to save the file.

   By default, Tekla EPM saves the file to the **Export** folder.
4. If necessary, modify the file name.
5. Click **Save**.

The project schedule is saved in the selected location as an XML file.

Create a project schedule report

You can create different project schedule reports according to your needs. You can either view the completion percentage and duration of the schedule tasks, or compare the changes made to schedule tasks from one baseline plan to another.

1. In the **Project Schedule** dialog box, click the **Project Schedule** ribbon tab.
2. In the menu, select **Reports**, or press **Ctrl+R** on the keyboard.
3. Click the arrow on the right side of **Baseline Plan** field of the **Schedule Report** dialog box, and select the baseline plan that you want to use in the report.
4. If you wish, add a snapshot of the selected baseline plan to the report to the by clicking the arrow on the right side of the **Snapshot** field, and selecting a snapshot in the list.

   If you only want to select from snapshots marked as savepoints, select the **Only Show Savepoints** check box.
5. If you want to compare two different versions of the project schedule, do the following:
   a. Select the **Run Comparison Report** check box.
   b. Click the arrow on the right side of lower **Baseline Plan** field, and select a baseline plan in the list.
   c. Click the arrow on the right side of lower **Snapshot** list, and select a snapshot in the list.

      To be able to compare two versions of a project schedule, ensure that you select a different baseline plan and snapshot than in the lists above.
6. Click **Make Report**.
7. In the **Report Selection** dialog box, click the report that you want to view, print, or export.

   For comparison, click the **Comparison Report** to view the tasks that have changed between the two baseline plans.
8. According to your needs, do any of the following:

To	Do this
View the report	• Click **View**. The report opens in **Tekla EPM Report Viewer**. You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

To	Do this
Print the report	a. Change the number of the printed copies by clicking the **+** and **-** buttons. b. Click **Print**. c. In the confirmation dialog box, click **Yes** to confirm printing the report. d. In the **Select Printer** dialog box, click a printer to select it. e. Click **OK**.
Export the report	a. Click **Export**. b. In the **Export Format** list, select an export format. c. Click **Browse**. d. Browse to the location where you want to save the exported file, and click **Save**. e. Modify the file name according to your needs. f. Click **Save**. g. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box. h. If you want to open the file after exporting it, select the **Open Exported Document** check box. i. Click **Export**.

9. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

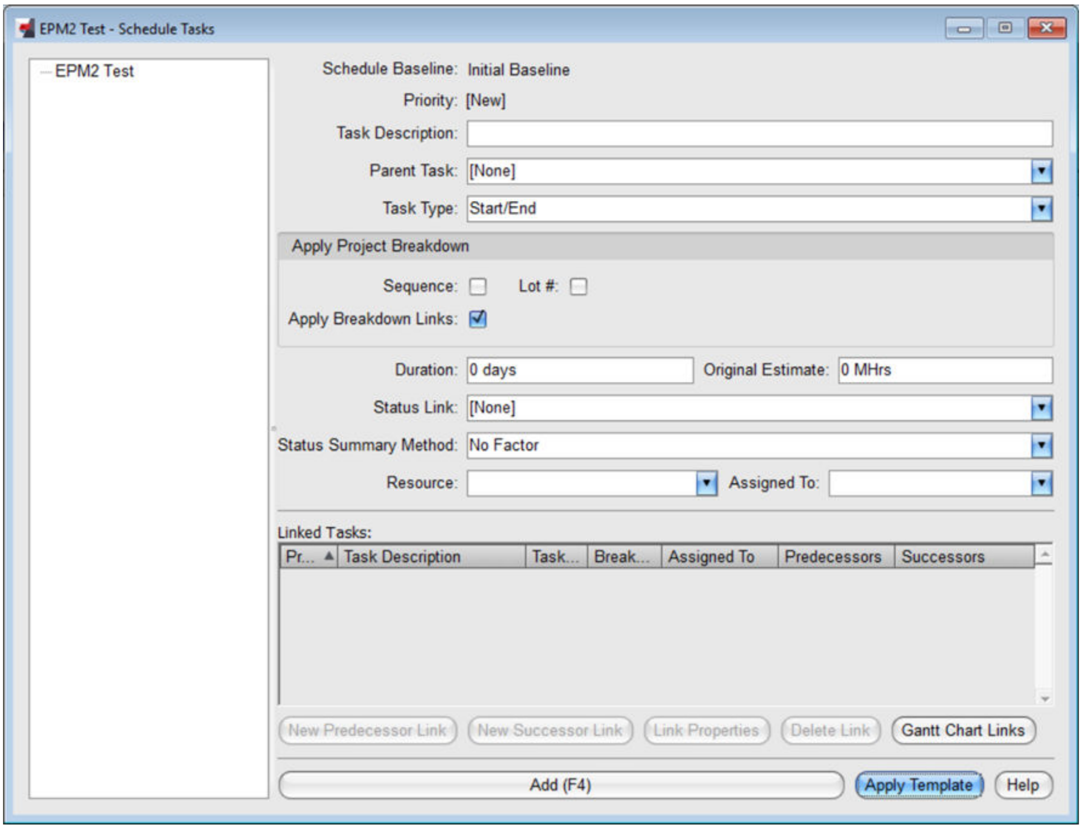
Example: Create a project schedule

The following steps provide an example workflow for creating a project schedule in the **Project Schedule** dialog box.

1. Apply a schedule template

Schedule templates can contain all of the schedule items and attributes required for a typical setup. Existing schedules can be saved as templates, and then applied to a new job using the **Apply Template** button. The schedule can always be modified to fit the project requirements.

To create a schedule template, see Create, modify, and delete schedule templates (page 12).

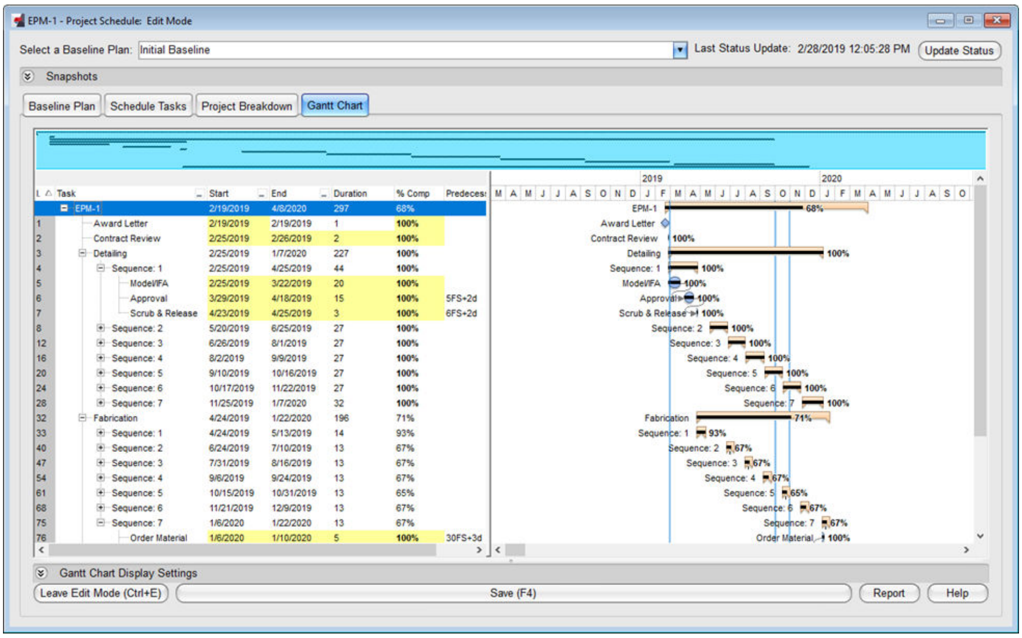


1. Open the **Schedule Tasks** dialog box.
2. In the lower-right corner, click **Apply Template**.
3. In the **Enter Value** dialog box, click the arrow on the right side of the field, and select the schedule template that you want to use.
4. Click **OK**.

   The schedule template is now applied to the project schedule.
5. Click the **Close** button (**X**) to close the **Schedule Tasks** dialog box.

2. Modify the schedule dates

1. Open the **Gantt Chart** tab.



2. Click **Enter Edit Mode**.

   Any information that is highlighted with yellow can be modified.

3. To modify what is shown in the chart, click the arrows on the left side of **Gantt Chart Display Settings** and select the check boxes for items that you want to show.

   For more information on the display settings, see Modify the Gantt chart (page 143).

4. Click **Save** to update the view.

   You can also modify if the chart displays time as days, weeks, or months. To do so, right-click anywhere in the chart, and select the suitable **Scale chart to** option.

5. To modify the dates of tasks in the chart, do one of the following:

   - Click the **Start** or **End** cell of the task, and select a date in the calendar.
   - Click a task, hold down the left mouse button, drag the task to the right location, and release the left mouse button.

   Repeat this process for all tasks to move them in the correct locations.

6. Click **Save**.

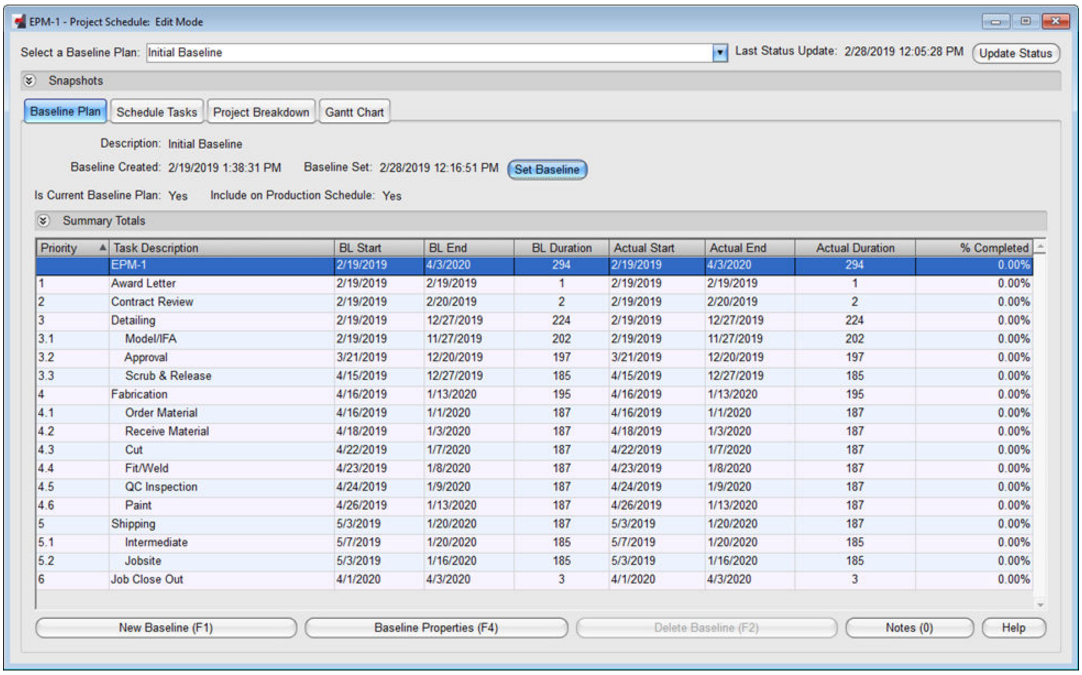
3. Set the baseline

When tasks have been moved to the desired dates, you need to set the project baseline. You can later compare the baseline duration to the actual duration during the project. The baseline also sends information to the production schedule.

If you have modified the dates on the **Gantt Chart** tab, you can set the baseline easily. Do the following:

1. Click the **Baseline Plan** tab to open it.
2. Click **Set Baseline**.
3. In the confirmation dialog box, click **Yes** to set the baseline values.

The baseline is saved, and the baseline dates update in the blank columns.



4. Add project breakdown information

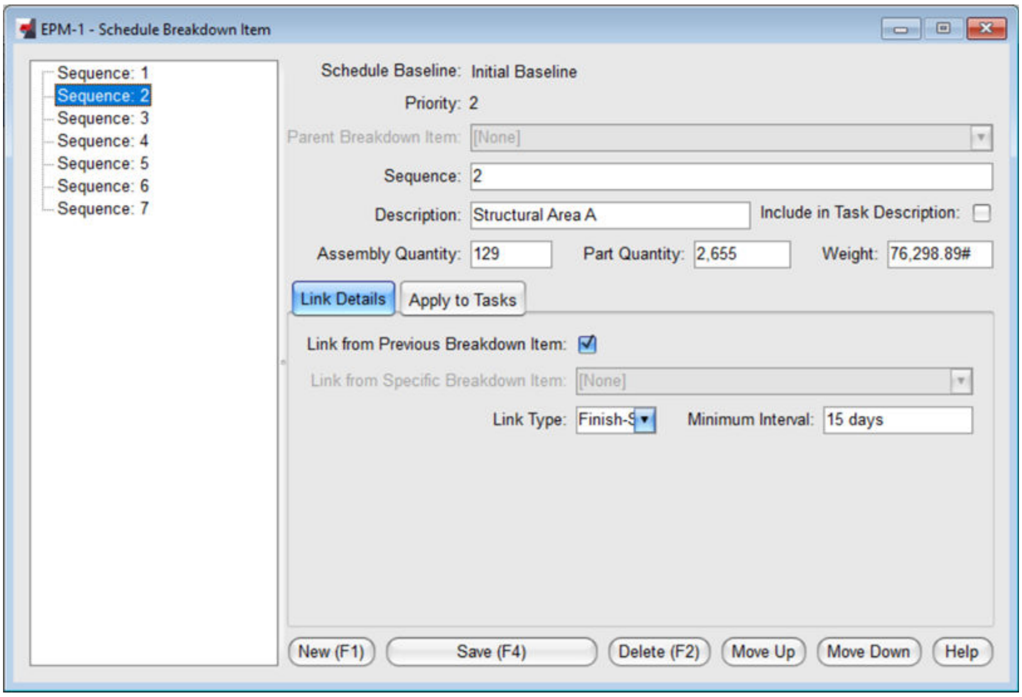
Use the **Project Breakdown** to divide a project into sub-tasks in order to schedule and track the completion of the task. For example, if your project has sequences and lot numbers, they should be added as breakdown items. You can also apply the breakdown items to the desired schedule tasks and link the breakdown items to each other.

For more information, see Add, modify, and delete breakdown items (page 137).

1. Open the **Project Breakdown** tab.
2. Click **New**.
3. In the **Schedule Breakdown Item** dialog box, enter the exact sequence number in the **Sequence** field.
4. If necessary, add a description or other information about the breakdown item.

5. Click **Add**.

   Repeat steps 2 to 5 for all sequences.



6. To add a lot, do the following:

   a. Click **New**.

   b. Click the arrow on the right side of the **Parent Breakdown Item** field, and select a sequence in the list.

   c. In the the **Lot #** field, type the exact lot number.

   d. Add a description or other information about the lot.

   e. Click **Add**.

   Repeat steps a to e for all necessary lots.

2.15 Define time tracking settings

In the **Time Tracking Settings** dialog box, you can define the settings that control adding and modifying time tracking records.

1. Click the **Maintenance** ribbon tab.
2. In the menu, select **Time Tracking Settings**.
3. On the **Standard Fields** tab of the **Time Tracking Settings** dialog box, modify the included fields as follows:

a. If you want to display a field when adding a time tracking record and allow the user to type information to the field, select the **Show Field** check box next to the field.

b. If you want to make the field mandatory, select the **Required** check box.

   The user needs to type information in a required field in order to add a time tracking record.

c. To change the title of the field in the **New Time Tracking Record** dialog box, type a new name in the **Title** field.

Repeat steps a to c for all necessary fields.

4. On the **User Defined Fields** tab, define any custom fields as follows:

   a. If you want to display a field when adding a time tracking record and allow the user to type information to the field, select the **Show Field** check box next to the field.

   b. If you want to make the field mandatory, select the **Required** check box.

      The user needs to type information in a required field in order to add a time tracking record.

   c. To name the field, type a name in the **Title** field.

   Repeat steps a to c to create all necessary fields.

5. To enable adding a time tracking record without start and end time, on the **Input Settings** tab, select the **Allow date entry only (without time)** check box.

6. On the **Input Settings** tab, select how Tekla EPM calculates the time:

   - **Compute start time from end time and hours**: When you change the times of an input record, the start time is automatically calculated according to the end time and the total hours.
   - **Compute end time from start time and hours**: When you change the times of an input record, the end time is automatically calculated according to the start time and the total hours.
   - **Compute hours from start time and end time**: When you change the start or end time, the regular hours are automatically calculated.

   Note that you can select either **Compute start time from end time and hours** or **Compute end time from start time and hours**, not both.

7. To save the time tracking settings, click **Save**.

See also

Add, modify, and view time tracking information (page 153)

2.16 Manage contract and invoicing information

In the **Contract & Invoicing** dialog box, you can view the current contract and invoice information, add new contract details and invoices, or modify contract and invoice information. The values set in **Contract & Invoicing** are used in the project schedule.

- At the bottom of the **Project Management** dialog box, click **Contract & Invoicing**.

In the **Contract & Invoicing** dialog box, you can view the total sum of the contract, approved change orders included in the contract or not included in the contract, the sum that has been invoiced, and the sum that has not yet been invoiced.

For more information, see the following links:

Add and modify contract information (page 166)

Create and modify invoices (page 169)

Add and modify contract information

Use the **Contract Items** dialog box to add new contract items to either the original contract or a change order. Contract items represent parts of the contract, such as detailing or materials. You can also modify, move, or delete existing contract items. Furthermore, you can define and adjust the properties of the project contract.

To access the **Contract Items** dialog box, do the following:

- In the **Contract & Invoicing** dialog box, click **Contract**.

Add a contract item to the original contract

1. On the **Contract Items** tab of the **Contract Items** dialog box, click **New Contract Item**.
2. In the **Contract Item** dialog box, type a description for the contract item.

   The description is used in project management reports.
3. Click the arrow on the right side of the **Type** list and select **Original Contract**.
4. In the **Amount** field, type the costs of the contract item.
5. Click the arrow on the right side of the **Schedule Task** list, and select the project schedule task that you want to link to the new contract item.

   When you link a contract item to a schedule task, Tekla EPM automatically finds the completion percentage of the contract item from the project schedule. This allows you to automatically calculate the amount to be invoiced based on the completion percentage.
6. Type any additional notes about the contract item.
7. Click **Save**.

The new contract item is added to the list on the left-hand pane.

The **Contract & Invoicing** dialog box now shows the totals for the contract and the sum to be invoiced.

You can now create invoices for the contract item. For more information, see Create and modify invoices (page 169).

All invoices related to the contract item are displayed in the **Invoices** section, below the contract item properties.

Add a contract item to a change order

1. On the **Contract Items** tab of the **Contract Items** dialog box, click **New Contract Item**.
2. In the **Contract Item** dialog box, type a description for the contract item.

   The description is used in project management reports.
3. Click the arrow on the right side of the **Type** list and select **Change Order**.
4. Click the arrow on the right side of the **Schedule Task** list, and select the project schedule task that you want to link to the new contract item.

   When you link a contract item to a schedule task, Tekla EPM automatically finds the completion percentage of the contract item from the project schedule. This allows you to automatically calculate the amount to be invoiced based on the completion percentage.
5. Type any additional notes about the contract item.

6. Click **Save**.

   The new contract item is added to the list on the left-hand pane.

7. To define the costs of the contract item, go back to the **Project Management** dialog box, and click **Change Orders**.
8. In the **Change Orders** dialog box, select the change order that you want to link to the contract item.
9. Click the arrow on the right side of the **Contract Item** list, and select the new contract item.
10. Click **Edit** to save the changes.

When you return to the **Contract Item** dialog box, that the costs of the selected change order are now used in the **Amount** field for the contract item. The selected change order is displayed in the **Change Orders** section, below the contract item properties.

The net amount of the change order will also be visible in the **Contract & Invoicing** dialog box.

Modify a contract item

1. On the left-hand pane of the **Contract Item** dialog box, select the contract item that you want to modify.
2. Modify the description, type, amount, schedule task, and notes according to your needs.
3. Click **Save** to update the contract item properties.

Move a contract item up or down

1. On the left-hand pane of the **Contract Item** dialog box, select the contract item that you want to move.
2. Click the **Move Up** and **Move Down** buttons to move the item to the desired position.

Delete a contract item

Deleting a contract item is permanent and cannot be undone.

Note that the contract items that have been invoiced cannot be deleted.

1. On the left-hand pane of the **Contract Item** dialog box, select the contract item that you want to delete.
2. Click **Delete**.
3. To permanently delete the contract item, click **Yes** in the confirmation dialog box.

Adjust the contract properties

1. In the **Contract Items** dialog box, click the **Other** tab to open it.
2. Adjust the contract properties:

Option	Description
Contract #	The contract number. The contract number is displayed in the standard **AIA G702** invoice form. Type the contract number in the **Contract #** field.
Contract For	A brief description of the contract, displayed in the standard **AIA G702** invoice form. Type a description in the **Contract For** field.
Retainage - Completed Work	The percentage of the invoiced completed work amount that is retained until the end of the project. The default value is 10%. Type a value in the **Retainage - Completed Work** field.
Stored Materials	The percentage of the invoiced stored materials amount that is retained until the end of the project. The default value is 10%. Type a value in the **Stored Materials** field.
Notes	Any additional notes or information about the contract.

3. Click **Save**.

   A message appears, telling you that the information has been saved.
4. Click **OK** to close the message.

Create and modify invoices

In the **Invoices** dialog box, you can create new invoices for contract items, modify or delete existing invoices, and create standard invoice documents or invoice reports.

To access the **Invoices** dialog box, do the following:

- In the **Contract & Invoicing** dialog box, click **Invoices**.

Create an invoice

1. In the **Invoices** dialog box, click **New Invoice**.
2. At the top of the **Invoices** dialog box, define the invoice properties:

Properties marked with an asterisk (*) are mandatory information.

Option	Description
Application # *	An identification number used to identify the invoice on the **AIA G702** and **AIA G703** reports. When creating a new invoice, the **Application #** field is automatically populated with the next available number. If necessary, type another number in the **Application #** field.
Invoice #	The invoice number used in your accounting software. Type the invoice number in the **Invoice #** field.
Date *	The date when the invoice was created. Click the arrow on the right side of the **Date** field, and select a date in the calendar.
Period Start *, **End** *	Dates that determine the date range during which the worked that is billed on the invoice was completed. Click the arrows on the right side of the **Period Start** and **End** fields, and select the start and end dates in the calendars.
Retainage - Completed Work	The retainage percent applied to the completed work. Type a value in the **Retainage - Completed Work** field. Note that when you create the final invoice, the value needs to be set to `0%`, so that the retainage withheld from the previous invoices can be billed.
Stored Materials	The retainage percent applied to the stored materials. Type a value in the **Stored Materials** field. Note that when you create the final invoice, the value needs to be set to `0%`, so that the retainage withheld from the previous invoices can be billed.
Created By *	The Tekla EPM user who is creating the invoice. When creating a new invoice, the default user is the one that is currently logged in to Tekla EPM on the current workstation. If necessary, click the arrow on the right side of the **Created By** list and select another user.

Option	Description
Invoice To *	The company and contact person that will receive the invoice. Click the arrow on the right side of the leftmost **Invoice To** list and select the company. Click the arrow on the right side of the rightmost **Invoice To** list and select the contact person.
Notes	Any additional notes or information about the invoice. Type any information in the **Notes** field.

3. In the list in the middle of the **Invoices** dialog box, select the contract item for which you want to create the invoice.

   Note that the properties at the bottom of the dialog box change according to the selected contract item. If the contract item is linked to a schedule task, the **% Complete** field is populated automatically.

4. Do one of the following:

   - To apply the sum that is to be invoiced according to the completion percentage to the completed work, click **Apply to Completed Work**.
   - To apply the sum that is to be invoiced according to the completion percentage to the stored materials, click **Apply to Stored Materials**.
   - To manually determine the sum to be invoiced and apply it to the completed work or the stored materials, type the sum in either the **Current - Completed Work** field or the **Stored Materials** field.
   - To set the sum to the full amount remaining, double-click the **Current - Completed Work** field or the **Stored Materials** field.

   The next material in the list of contract items is selected.

   If necessary, to add the currently selected contract item to the invoice, repeat step 4.

5. Click **Save** to save the invoice.

Modify an invoice

1. In the **Invoices** dialog box, select the invoice that you want to modify.
2. Click **Properties**.

3. At the top of the **Invoices** dialog box, modify the invoice properties:

Option	Description
Application #	An identification number used to identify the invoice on the **AIA G702** and **AIA G703** reports. When creating a new invoice, the **Application #** field is automatically populated with the next available number. If necessary, type another number in the **Application #** field.
Invoice #	The invoice number used in your accounting software. Type the invoice number in the **Invoice #** field.
Date	The date when the invoice was created. Click the arrow on the right side of the **Date** field, and select a date in the calendar.
Period Start, **End**	Dates that determine the date range during which the worked that is billed on the invoice was completed. Click the arrows on the right side of the **Period Start** and **End** fields, and select the start and end dates in the calendars.
Retainage - Completed Work	The retainage percent applied to the completed work. Type a value in the **Retainage - Completed Work** field. Note that when you create the final invoice, the value needs to be set to `0%`, so that the retainage withheld from the previous invoices can be billed.
Stored Materials	The retainage percent applied to the stored materials. Type a value in the **Stored Materials** field. Note that when you create the final invoice, the value needs to be set to `0%`, so that the retainage withheld from the previous invoices can be billed.
Created By	The Tekla EPM user who is creating the invoice. When creating a new invoice, the default user is the one that is currently logged in to Tekla EPM on the current workstation. If necessary, click the arrow on the right side of the **Created By** list and select another user.

Option	Description
Invoice To	The company and contact person that will receive the invoice. Click the arrow on the right side of the leftmost **Invoice To** list and select the company. Click the arrow on the right side of the rightmost **Invoice To** list and select the contact person.
Notes	Any additional notes or information about the invoice. Type any information in the **Notes** field.

4. If necessary, do either of the following:
   - To change if the invoiced amount is applied to the completed work or the stored materials, click either **Apply to Completed Work** or **Apply to Stored Materials**.
   - To manually change the amount to be invoiced, type a new value in the **Current - Completed Work** or the **Stored Materials** field.
5. Click **Save** to save the invoice.

Delete an invoice

Deleting an invoice is permanent and cannot be undone.

1. In the **Invoices** dialog box, select the invoice that you want to delete.
2. Click **Properties**.
3. In the lower-right corner of the **Invoices** dialog box, click **Delete**.
4. To permanently delete the invoice, click **Yes** in the confirmation dialog box.

View, print, or export invoice documents or invoice reports

1. In the **Invoices** dialog box, click the **Invoice** ribbon tab.
2. In the menu, select **Reports**, or press **Ctrl+R** on the keyboard.
3. In the **Report Selection** dialog box, select the desired invoice report.

   The **AIA G702** and **AIA G703** reports are standard forms for creating invoices.

4. Do any of the following:

To	Do this
View the invoice document or invoice report	• Click **View**. The selected report or document opens in **Tekla EPM Report Viewer**. You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.
Print the invoice document or invoice report	a. Change the number of the printed copies by clicking the **+** and **-** buttons. b. Click **Print**. c. To confirm printing the document or report, click **Yes** in the confirmation dialog box. d. In the **Select Printer** dialog box, click a printer to select it. e. Click **OK**.
Export the invoice document or invoice report	a. Click **Export**. b. In the **Export Format** list, select an export format. c. Click **Browse**. d. Modify the file name according to your needs. e. Browse to the location where you want to save the exported file, and click **Save**. f. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box. g. If you want to open the file after exporting it, select the **Open Exported Document** check box. h. Click **Export**.

5. To close the dialog box, click the **Close** button (**X**) in the upper-right corner.

2.17 View, print, or export the project summary

Use the **Project Summary** command to view the project summary report of project management jobs that are linked to one or more of the following modules: **Production Control**, **Combining**, **Estimating**, and **Purchasing**.

By creating the project summary, you can:

- Compare the materials used in **Production Control** with the estimated materials and the pre-purchased materials in **Combining**.
- View the total values for purchased materials, materials moved from other jobs, and materials moved to scrap.
- View the current production status: see which materials are listed on a purchase order and have not yet been received, which materials are in stock but have not been processed, and which have been charged to the job and taken from stock.

Create a project summary report

1. In the lower-right corner of the **Project Management** dialog box, click **Project Summary**.
2. In the **Report Selection** dialog box, select the desired project summary report.

   The **Full Project Summary** report provides a snapshot of the current status of the project and the module components that are currently linked to each other. It contains:

   - A shape summary, which allows you to compare materials by shape. The job progress is displayed by weight and cost. All items entered into the bill of materials in **Production Control** appear in the **Production Control** column.
   - A purchase order summary, which shows all the purchase orders associated with the project management jobs.
   - An inventory transfer summary, which shows materials transferred from a different job into the current project management job.
   - The production and shipping status summary report, which shows the quantity of pieces that have been processed. The items are sorted by the route assigned in **Production Control**. The production and shipping status information is automatically updated when changes are made.

   The project summary reports also have reports for all the breakdown areas, but these reports are not displayed by default. To customize the displayed reports, click **Edit Report Types** in the **Report Selection** dialog box.

View the project summary report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the project summary report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the project summary report

1. Click **Export**.
2. In the **Export Format** list, select an export format.
3. Click **Browse**.
4. Browse to the location where you want to save the exported file, and click **Save**.
5. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
6. If you want to open the file after exporting it, select the **Open Exported Document** check box.
7. Click **Export**.

2.18 Import and export project management information

You can import drawing status information as an XML file, or export the production status to an XML file or to Trimble Connect.

See also

Import drawing status information (page 177)

Export the production status to Tekla Structures or Advance Steel (page 177)

Export the production status to SDS/2 (page 178)

Send the production status to Trimble Connect (page 179)

Import drawing status information

Use the **Import** command to import drawing status from an XML file to Tekla EPM.

1. In the **Project Management** dialog box, click the **Project Management** ribbon tab.
2. In the menu, select **Import**.
3. In the **Open** dialog box, browse to find the XML file that you want to import.
4. Click the XML file to select it.
5. Click **Open**.
6. In the **Import Tekla EPM Exchange File** dialog box, view the import status.
7. When the import process is completed, click the **Close** button to close the **Import Tekla EPM Exchange File** dialog box.

Export the production status to Tekla Structures or Advance Steel

You can export the production status of the current job as an XML file to either Tekla Structures or Advance Steel.

1. Do one of the following:

Option	Description
Export the production status from the **Production Control** dialog box	a. In the **Production Control** dialog box, click the **Production Control** ribbon tab. b. In the menu, select **Export** --> **Export Production Status to XML - Tekla Structures** or **Export** --> **Export Production Status to XML - Advance Steel** .
Export the production status from the **Project Management** dialog box	a. In the **Project Management** dialog box, click the **Project Management** ribbon tab. b. In the menu, select **Data Exchange** --> **Export Production Status to XML - Tekla Structures** or **Data Exchange** --> **Export Production Status to XML - Advance Steel** .

2. In the **Save As** dialog box, browse to the folder where you want to save the file.

   By default, Tekla EPM saves the file to the **Export** folder.
3. If necessary, modify the file name.
4. Click **Save**.

The production status is saved in the selected location as an XML file.

See also

Export the production status to SDS/2 (page 178)

Export the production status to SDS/2

You can export the production status of the current job to SDS/2 as an XML file.

1. Do one of the following:

Option	Description
Export the production status from the **Production Control** dialog box	a. In the **Production Control** dialog box, click the **Production Control** ribbon tab. b. In the menu, select **Export** --> **Export Production Status to XML - SDS/2** .
Export the production status from the **Project Management** dialog box	a. In the **Project Management** dialog box, click the **Project Management** ribbon tab. b. In the menu, select **Data Exchange** --> **Export Production Status to XML - SDS/2** .

2. In the **SDS/2 Field Map** dialog box, define SDS/2 import settings as follows:
   a. Click **New Field**.
   b. Click the arrow on the right side of the **SDS/2 Object** field and select the SDS/2 object type in the list.
   c. For member properties, click the arrow on the right side of the **SDS/2 Category**, and select a software solution in the list.
   d. Click the arrow on the right side of the **SDS/2 Field** field, and select the field to which the information is exported in SDS/2.
   e. Click the arrow on the right side of the **Tekla EPM Field** field, and select the Tekla EPM field from which the information is exported to the selected SDS/2 field.
   f. Click **Add Field**.

Repeat steps a to f to match all necessary SDS/2 and Tekla EPM fields to each other.

If you want to save the SDS/2 import settings for later use, type a description for the settings in the **Description** field, and click **Save**.

3. Click **OK**.
4. In the **Save As** dialog box, browse to the folder where you want to save the file.

   By default, Tekla EPM saves the file to the **Export** folder.
5. If necessary, modify the file name.
6. Click **Save**.

See also

Export the production status to Tekla Structures or Advance Steel (page 177)

Send the production status to Trimble Connect

Use the **Push Status to Trimble Connect** command to send the status of the production control job manually to Trimble Connect. If you have enabled automatic status sync, Tekla EPM automatically sends the status to Trimble Connect.

1. In the **Production Control** dialog box, click the **Production Control** ribbon tab.
2. In the menu, select **Export** --> **Push Status to Trimble Connect** .

The production status is updated to Trimble Connect.

2.19 View, print, or export project management reports

You can create various reports containing information about the current project management job. For example, you can create a list of transmittals, a notice informing the recipient about overdue drawings, or a standard invoice.

Create a project management report

1. In the **Project Management** dialog box, click the **Project Management** ribbon tab.
2. In the menu, select **Reports**, or press **Ctrl+R** on the keyboard.

3. To only include specific items in the report, in the **Project Management Report Filters** dialog box, select a filter type in the **Type** list, and click **Select**.
4. In the **Filter** dialog box, do one of the following depending on the filter type:
   - Click the arrow buttons to move the items that you want to include in the report to the **Included** list.
   - Type the maximum and minimum values for the items that you want to include in the report.
5. Click **OK**.
6. At the bottom of the **Project Management Report Filters** dialog box, select check boxes depending on which kind of reports you want to create.

   For example, to only create drawing reports, select the **Drawings** check box only.
7. Click **Make Report**.
8. In the **Report Selection** dialog box, select the report that you want to view, print, or export.

View the report

- Click **View**.

The report opens in **Tekla EPM Report Viewer**.

You can use the **Email Excel** and **Email PDF** buttons at the top of the **Tekla EPM Report Viewer** window to email the report via Microsoft Outlook.

Print the report

1. Change the number of the printed copies by clicking the **+** and **-** buttons.
2. Click **Print**.
3. To confirm printing the report, click **Yes** in the confirmation dialog box.
4. In the **Select Printer** dialog box, click a printer to select it.
5. Click **OK**.

Export the report

1. Click **Export**.
2. In the **Export Format** list, select an export format.

3. Click **Browse**.
4. Browse to the location where you want to save the exported file, and click **Save**.
5. If you want to attach the exported file to a Microsoft Outlook email and send it to a recipient, select the **Attach to Email** check box.
6. If you want to open the file after exporting it, select the **Open Exported Document** check box.
7. Click **Export**.

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