The project planning guidebook

A practical end-to-end workflow for projects, activity dependencies, critical paths, Gantt timelines, what-if scenarios, agreement-linked demands and your Planning Partner.

YOUR TEST PORTFOLIO

7 projects · 350 activities · 21 scenarios · 70 agreements · 49 milestones

All project, customer, commercial and scheduling examples are mock data. They are not official SKYi delivery commitments. Validate every assumption before using the tool operationally.

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01 · Start with the test portfolio

The sample workspace

Seven fictional projects cover two master plans and five tower wings. Each project contains 50 activities, three what-if scenarios, ten sales agreements and seven payment milestones totalling 100%. Names, customers, prices, progress and dates are illustrative, not SKYi business records. Master-plan projects have their own schedules; their figures are not roll-ups of the children.

Navigate on your phone

Open the menu at the top left. Select Overview, Schedule, Gantt chart, What-if, Sales milestones, Excel workspace, Planning Partner or Guidebook. Use the project selector to switch wings. On desktop the sidebar can collapse to icons and expand again.

Save your work

Anonymous changes remain in that browser. Sign in to save a private workspace to your account. Wait for Saved online before closing. If a save conflict appears, reload before further changes. Shared team access is not included.

02 · Build the project and activity structure

Projects and wings

Open Overview and add a project. Supply its name, unique code and start date, then its location, building, wing, target finish and optional parent. Parent relationships organise the portfolio; they do not create links between activity schedules.

All activity fields

In Schedule, add an activity or select an existing one. The activity editor preserves the report fields: Activity ID, Task, Task Code, Financial Project, Building, Task List, Location, Planned Start, Planned Finish, Duration, Predecessor, Offset / Delay, Status, Percent Complete, Actual Start, Actual End, Baseline Start, Baseline End, Status 1 and Priority. Wing and Assigned to are additional fields.

Planned versus calculated dates

Planned dates preserve the source report. Scheduled dates come from dependency calculations. Duration is entered in calendar days. A target finish is a reference; it does not automatically constrain or compress the programme. Progress and actual dates are recorded fields, not an automatic remaining-work reschedule.

03 · Link tasks and understand critical paths

Multiple links

Add predecessors in the activity editor. Finish-to-start (FS) starts the next task after the earlier finish; start-to-start (SS) links starts; finish-to-finish (FF) links finishes; start-to-finish (SF) links the next finish to the earlier start. Successors are derived from predecessor links, so editing either end updates one consistent set of links.

Offsets and overlap

A positive lag adds a calendar-day gap; a negative lag allows overlap. Example: a five-day activity starting 1 November finishes on 5 November. An FS successor with a two-day lag starts on 8 November. An SS successor with a three-day lag starts on 4 November.

Critical path and loops

Float is the spare time before a task delays the project finish. Critical activities have zero or negative float and are marked red. Multiple parallel critical paths can exist. Dependency loops cannot produce reliable dates or float. The new mock dataset has no loops; real imports are still checked. Do not remove genuine validation warnings merely to make a schedule look complete.

04 · Read the Gantt on any screen

Phone timeline

Each phone row shows the full activity name, duration, scheduled start and finish, float or critical status, and a fitted timeline bar. Red is critical, green is other scheduled work. Dashed outlines are the selected what-if scenario. The date range above the chart is shared by all rows.

Desktop timeline

The desktop chart aligns readable activity labels with date-grid rows. Use Fit project to show the programme, or zoom in and out. Horizontal movement is confined to the zoomed chart, never to section navigation. Select an activity to edit it.

Filter before comparing

Search by activity, location, code or assignee. Filter by work type, wing or location and toggle Critical path only. Load more activities when a longer project exceeds the initial page.

05 · Test scenarios before committing

Three ready-made cases

Select the monsoon foundation delay, slower RCC productivity, or two-crew finishing recovery. Each is an overlay: the live plan is unchanged. Compare finish dates and day impact, inspect changes, and check the dashed bars in Gantt.

Change a task or a work type

Create a scenario, select an activity, enter a delay or replacement duration and apply it. Alternatively stretch a work type by a percentage. Positive durations slow work; a shorter entered duration can model recovery. Delays and durations are assumptions, not predictions.

Other planning variables

Use the activity editor for links, offsets, dates, location, wing, progress, priority and assignee. The agent can discuss procurement, permits, crew productivity, risk and budget assumptions, but these do not become resource-levelling or cost-engine calculations. Apply proposed schedule changes yourself after checking them.

06 · Link sales agreements to construction

Agreements

Open Sales milestones and select Agreements. Record unit, customer, value in INR, date, building and wing. The mock agreements are fictional and must not be used as actual customer records.

Payment stages

Each milestone has a percentage and linked activity. A stage without a selected agreement applies to all project agreements; an agreement-specific stage applies only to that agreement. Demand value equals agreement value multiplied by the stage percentage. Review per-agreement totals when combining shared and specific stages; the shared plan total alone does not validate every agreement.

Dates and cash-flow shifts

The demand date follows the linked activity completion. The selected scenario shows the revised date and shift. Example: a 10% stage on an INR 1,00,00,000 agreement is INR 10,00,000. A 15-day linked activity delay can shift its demand by 15 days. These are forecasts, not invoices or collections.

07 · Discuss the plan with Planning Partner

Private separate conversations

Sign in, open Planning Partner and start a conversation. Each conversation has its own page address and saved messages. Use the conversation list to switch or delete threads. Account conversations are not stored as anonymous browser history.

Grounded planning review

The agent can review the active project, all activity fields, computed critical-path dates, the portfolio, sales agreements and named scenario comparisons. Project review and Scenario comparison tool results appear inside expandable sections of the reply. The full saved conversation is supplied on each request.

Prompts to try

Ask: Which tasks are critical? Compare monsoon, RCC and recovery impacts. What happens to payment demand dates? Review dependencies and approval risks. What assumptions should we validate about labour and material availability? The agent explains and proposes; it does not edit the live plan, save new scenarios or guarantee outcomes.

08 · Excel workflow and acceptance checklist

Branded workbooks

Open Excel workspace to download a blank template or export a populated workbook. Sheets include Start here, Lists, Activities, Dependencies, Projects, Agreements, Milestones and Demand forecast, with dropdown selections and the SKYi logo. Use the separate Dependencies sheet for multiple links, types and lags.

Import carefully

Keep the required source column headers. Import into the selected project, review validation and check task IDs, dates and predecessor references. Original planned dates are separate from calculated dates. The import is not a complete portfolio or scenario round-trip; verify project hierarchy and recreate scenario overlays as needed.

End-to-end rehearsal

Switch to a mock wing. Edit a duration and inspect its critical path. Select a what-if and compare Gantt. Review a linked sales demand. Export Excel and inspect the workbook. Create two agent conversations, send a different question to each, reload both and verify their histories. Sign out and confirm private account information is cleared. Replace mock data with approved records before operational use.