



The following are guidelines for consideration to promote seamless use of SmartPM™ project analytics software. By following these guidelines, users will reduce the occurrence of import errors, software performance issues, and analysis of data not representative of the project being imported.

#### **Working with SmartPM™**

- Use Google Chrome to access SmartPM
- Import Only “like” files (e.g. XER and MPP files cannot be crossed)
- Cannot import schedules with a data date earlier or equal to latest data date imported
- After kicking off an analysis, wait for confirmation of the analysis before evaluating the performance metrics (*note: users receive an email when the analysis is complete*)
- Forecasted Completion Dates won’t be populated until the project achieves >25% complete

#### **General Schedule Management**

- Limit constraint usage
- Avoid long duration activities
- No missing logic
- Make sure there is crew logic (e.g. drywall from level 1 is linked to drywall on level 2)
- Verify that Actual Start, Actual Finish, and Percent Complete values are correct before importing into SmartPM

#### **Scheduling in Primavera**

- Schedule utilizing “Retained Logic”
- Avoid inter-project links (multiple XER files linked together) – either merge the files or analyze them separately

#### **Scheduling in Microsoft Project**

- Status Date is populated and is correct
- Schedule has been “run” against the status date
- Avoid Summary Bar logic