

# Asta Powerproject

An Introduction to

Version 12



**asta**

An Eleco plc Company


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**This area is for you to put your notes in. You'll find it on every page in the training manual.**

 = Note, something of interest

 = Warning, to make you aware of something.

## Course Objectives

### During the day you will learn how to...

- ▶ Recognise the Asta Powerproject desktop
- ▶ Edit and apply working time through calendars
- ▶ Create a linked bar chart
- ▶ Understand and analyse the Critical Path and Float
- ▶ Manipulate the chart using constraints
- ▶ Summarise the bar chart
- ▶ Create a coded reporting system
- ▶ Edit the display
- ▶ Update progress on your project
- ▶ Print your project

*Topics will be backed up by exercises*

*This booklet is yours to take away*

*Please feel free to add any notes you feel are relevant*

*Please ask any questions*

## Getting started

### Basics

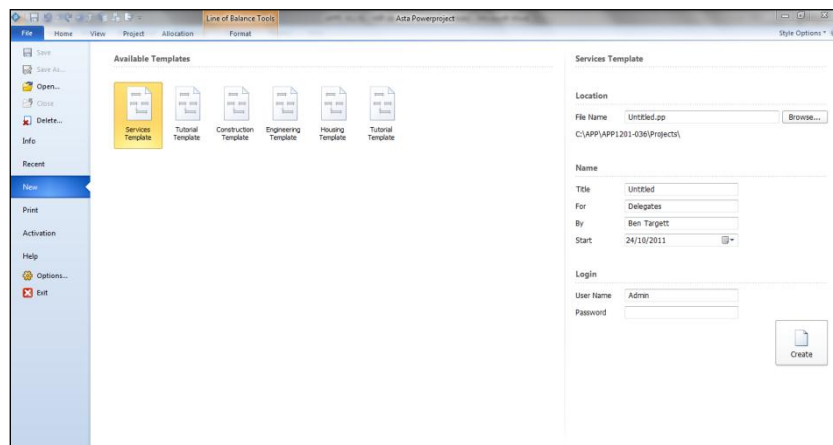
Powerproject follows many of the rules for windows.

- ▶ **Left click** will usually select an item.
- ▶ **Double click** will activate it.
- ▶ **Right click** gives you a menu to make changes.
- ▶ **Click and drag** will move an item from one part of the screen to another or will select multiple items.
- ▶ **Shift button** will allow you to select adjacent items.
- ▶ **Control button** will select non-adjacent items.

### Starting a new project

To start a new project in **Asta Powerproject**:

- ▶ Select the **File** tab
- ▶ Select **New**



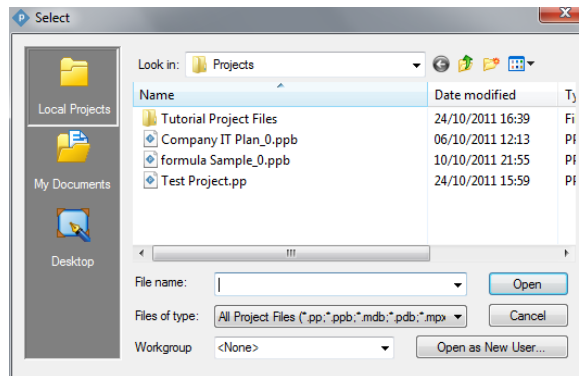
- ▶ Select a template on which to base your project e.g. Construction Template.
- ▶ Enter the details on the new project:
- ▶ **Filename** – The name of the document
- ▶ **Name** – The print title
- ▶ **For** – Who the project is for i.e. the client
- ▶ **By** – Who the project is by i.e. your name or company
- ▶ **Start** – The start date for the whole project
- ▶ Optionally you can enter a **User Name** and **Password**


Once these details have been entered, click **Create**.

### Opening an existing project

To start a new project in **Asta Powerproject**:

- ▶ Select the **File** tab
- ▶ If your project has been opened recently, select **Recent**. Your recent projects are displayed to the right.
- ▶ If your project has not been opened recently, Select
- ▶ Then select the file you wish to open.

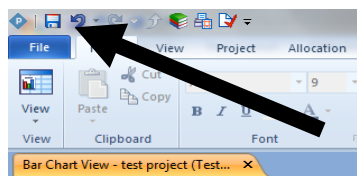


 If you open a project from a previous version it will convert the file to the latest version. Previous versions will then no longer be able to open the file.

## Saving a file

As you work in your Asta Powerproject File you can save by:

- ▶ Selecting the **save** button on the quick access tool bar

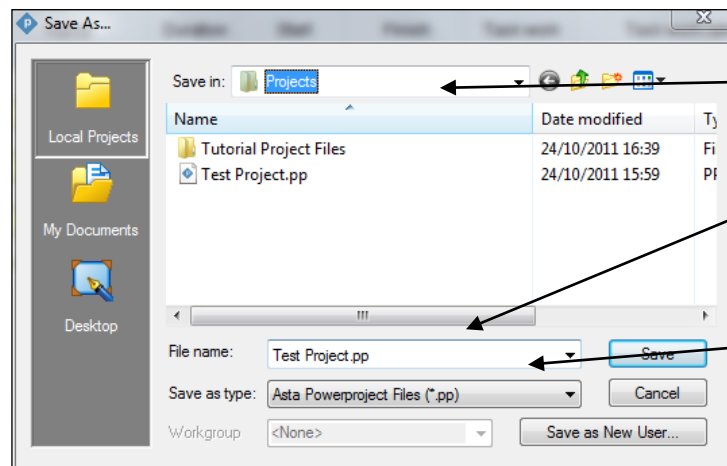
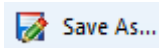


- ▶ Or, by returning to the **File** tab and selecting **Save**.

## Saving a file under a new name

If you want to save the project under a new file name:

- ▶ Select the **File** tab
- ▶ Select **Save As**



Select where you wish to save the project

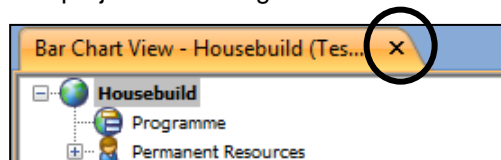
Enter your new file name

Choose a suitable file type

## Closing a project

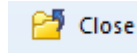
To close the active Asta Powerproject File:

- ▶ Close the project tabs using the X next to each



Or

- ▶ Return to the **File** tab and select

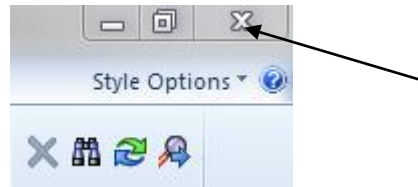


If the project has not been saved you will be prompted to do so.

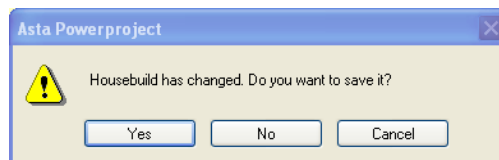
## Exiting Asta Powerproject

To exit **Asta Powerproject**:

- ▶ Click on the X at the top right of the screen



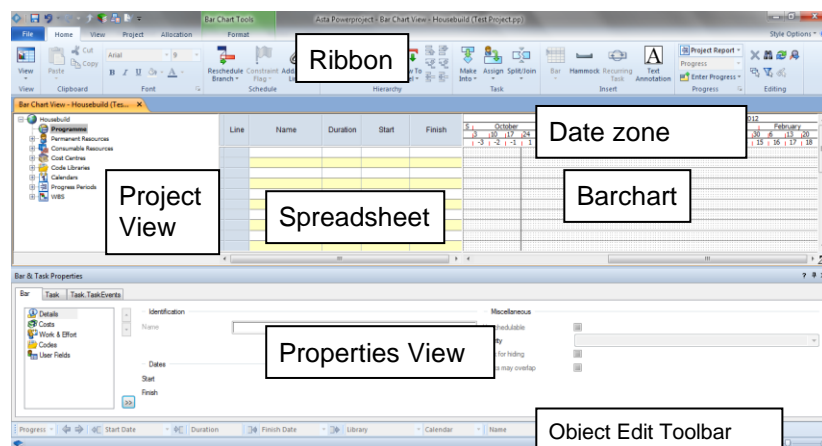
If you try to close an individual project, or the Powerproject software altogether, without saving, Powerproject will ensure you do not accidentally lose changes by prompting to ask if you want to save.



## Asta Powerproject screen areas

This section covers the general layout of the **Asta Powerproject** working area.

The **Asta Powerproject** screen is divided into a number of areas. This may vary for existing projects where the layout has been changed to suit the needs of the user.



- ▶ **Ribbon** – Contains the commands for your project
- ▶ **Project View** – Shows the structure of your project and shows the list of library items available.
- ▶ **Barchart** – Information on your project in graphic form, your Gantt Chart
- ▶ **Date zone**
- ▶ **Spreadsheet** – Information on your project in tabular form
- ▶ **Properties View** – Allows you to edit the properties of a selected object



- ▶ **Object Edit Toolbar** – Used to edit tasks and/or links in the barchart

## The Ribbon

The ribbon area in **Asta Powerproject** gives you access to all the features you will need when working on your project. It has 5 main tabs, each with a different set of commands and 1 tab to return to the backstage area of the project.




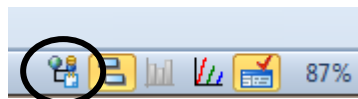
- ▶ **Home** – Contains the most popular commands
- ▶ **View** – Commands that will change the way your project and screen layout looks
- ▶ **Project** – Project data commands
- ▶ **Allocation** – Commands to allocate cost and resource information
- ▶ **Format** – To change the Barchart and Date Zone formatting

## The Project View

The project view shows the structure of your project and shows the list of library items available.

The project view area can be hidden if screen space is at a premium by:

- ▶ Selecting the **Format** tab and clicking the  command
- Or
- ▶ Selecting the same command on the bottom toolbar



You can resize the area to make the content clearly visible by:

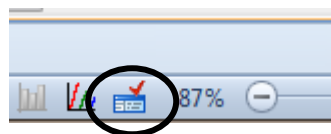
- ▶ Place the cursor over the left edge of the table area. The cursor will become a double sided arrow. Drag this to the right of the screen

## Properties View

The properties view allows you to add and edit data to selected object in your project. It can be set to show permanently or set to auto hide.

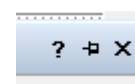
To open and close the **Properties View**:

- ▶ Select the **Properties View** command on the bottom toolbar



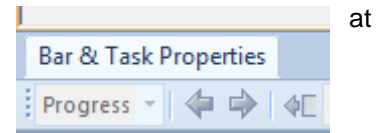
To set the **Properties View** to auto hide:

- ▶ Click the pin icon on the **Properties View** title bar so the pin faces to the left of the screen.



title bar so the pin

- ▶ The **Properties View** will reduce to a tab at the bottom right of the screen when unselected.



## Creating a project

A project is a series of tasks which must be completed to achieve a set of objectives. The Spreadsheet displays the task information and the GANTT chart (Bar Chart) shows the tasks in their date position and duration

| Line | Name | Start  | Duration   | Finish |            |
|------|------|--------|------------|--------|------------|
| +    | 1    | Design | 04/01/2010 | 1w 3d  | 13/01/2010 |

|  |  | 2009     |       |
|--|--|----------|-------|
|  |  | December | Janu: |
|  |  | 21       | 28    |
|  |  | -2       | -1    |
|  |  | 1        | 2     |

A **Task** is a unit of work with a duration. Tasks can be created on the Spreadsheet or drawn onto the GANTT chart and they can be linked to show relationships between them to create the critical path. You can create more than one task on the same bar to show repetitive or intermittent working. Task names can be used to describe the task, and do not need to be unique.

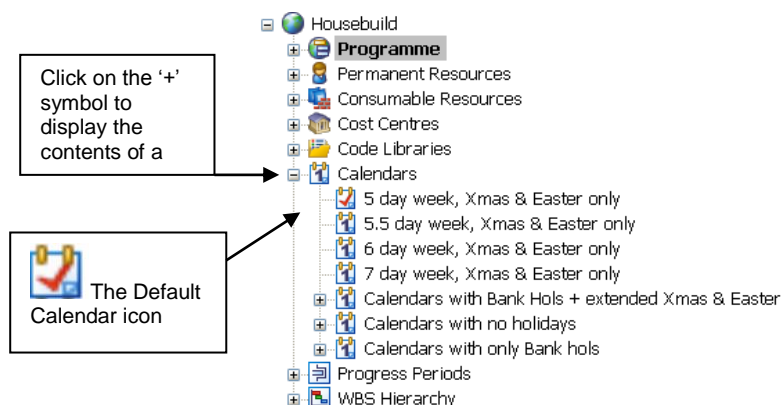
## Calendars

Calendars define the working and working time within a project. The Calendar consists of a planned pattern of work to which *exceptions* can be added. An exception is any day which does not conform to the planned pattern of work, e.g. holidays or overtime.

The Construction and Housing templates both contain Calendars which cover the most common working patterns. Customised templates may have Calendars tailored to your individual requirements.

To display a list of available Calendars:

- ▶ In the **Project View**, open the calendars folder using the + symbol



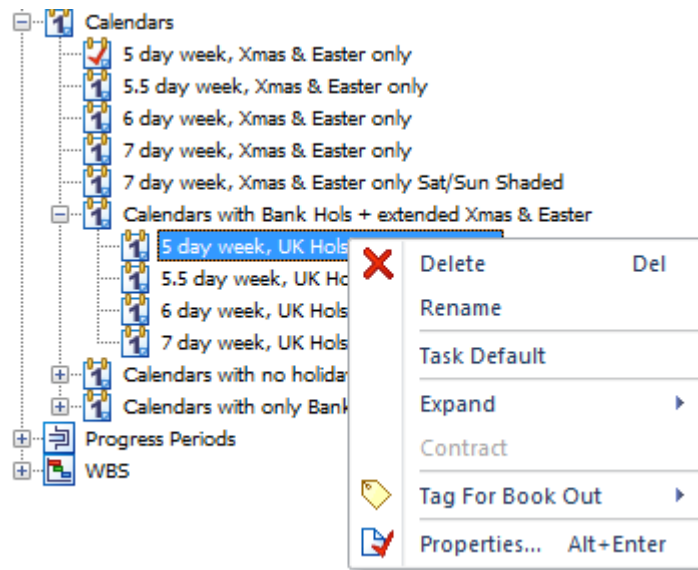
- ▶ Sub folders are opened in the same way.

One calendar in the list will be set as the default, meaning that any new task you create will follow that calendars work pattern.

You will need to select which calendar is the closest to your won working patterns and set that as the default.

To select which calendar you wish to use as the default:

- ▶ Right click on the calendar you wish to set as the default
- ▶ Select **Task Default** from the list



- ▶ The tick will move to the new default calendar

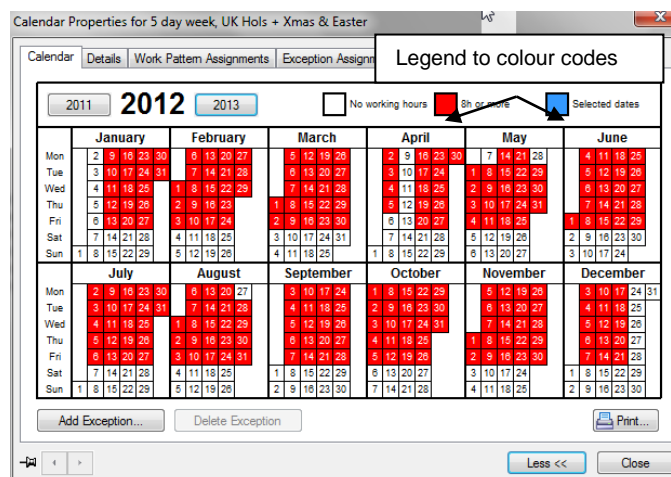
Once the default calendar has been selected, you can then edit the calendars properties to the specific working patterns of this project.

To edit the calendar:

- ▶ Right click on the calendar you wish to edit
- ▶ Select **Properties**

## Calendar screen overview


Each day in the Calendar has a working pattern assigned to it. An exception is any day which does not follow that working pattern.



Each day has a period of working and non working time assigned. To view these times

- ▶ Double click on the day you wish to view. The day will open in a separate pop up, showing the working and non working time during that day. N.B All Asta supplied calendars have the same 8 hour per day pattern.

| Period        | Start Time | End Time | Duration |
|---------------|------------|----------|----------|
| ⊖ Non Working | 00:00      | 08:00    | 8h       |
| ⊕ Working     | 08:00      | 12:00    | 4h       |
| ⊖ Non Working | 12:00      | 13:00    | 1h       |
| ⊕ Working     | 13:00      | 17:00    | 4h       |
| ⊖ Non Working | 17:00      | 24:00    | 7h       |

 **Holiday exceptions** are allocated to the whole 24hr period. Simply tick the box for All day exception

## Adding exceptions

If a date in the calendar does not match your working pattern you will be able to add or delete exceptions to the dates to change them. To add an exception to any dates:

- ▶ Left click on the date you wish to select. If you wish to select more than one date, you will need to hold the CTRL key and click on each date.
- ▶ Click the **Add Exception** button.
- ▶ Choose which **Exception type** you wish to add.
- ▶ Choose the period of time you wish the exception to last for in the **Exception period** section.
- ▶ Click **Add**

When adding an exception, it is important to set the correct time periods.

- ▶ **Specific start and end times** allows you to set the start and finish of the time to the nearest 30mins.
- ▶ **From work pattern periods** matches the morning and afternoon to those already set for the calendar. (This option will produce the best results)
- ▶ **24 hour exception** will add the selected exception for the whole 25 hours of the day.

1. Select the type of exception
2. Pick a period of time for that exception:
  - a. Specific times
  - b. From work pattern periods
  - c. 24 Hour Exception.

## Deleting exceptions

Removing an exception from a date will return those dates back to the standard work pattern. To

- ▶ Select the dates with the exceptions you wish to remove.
- ▶ Click **Delete Exceptions**
- ▶ A pop up will appear asking if you are sure you wish to delete the exceptions. If you are, select **Yes**, if not select **No**.

## Entering your task data

Once the calendar has been established you will be able to start entering your task data, entering the correct durations for each task.

## Entering bar & task names

To create the task titles that will make up the project:

- ▶ Move the mouse pointer over an empty cell in the Name column and left click
- ▶ Type the name 'Set up Site' and press **ENTER**.
- ▶ Type in the activity list, as shown.

| Line | Name          |
|------|---------------|
| 1    | Design        |
| 2    | Start on site |
| 3    | Set up site   |
| 4    | Meetings      |
| 5    | Dig footings  |

## Creating tasks

A task can be created by either typing the duration into the column on the **Spreadsheet**, or by using the cursor to draw onto the **Bar Chart**. Once created, any aspect of the task can be edited using either the **Spreadsheet** or using the mouse on the task bar.

To create tasks in the **Spreadsheet**:

- ▶ Click in the duration column of the first task of the table.
- ▶ Type the duration you wish into the column.

You can use any duration unit by adding the appropriate letter after the number, i.e. d for days and w for weeks.

- ▶ Press **ENTER**. A task is displayed on the **Bar Chart**.

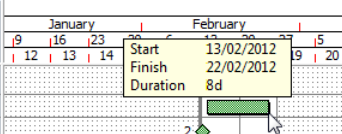
To create tasks on the **Bar Chart**:

- ▶ Place the mouse cursor in the **Bar Chart** on the line for the task, the cursor will now be a cross
- ▶ Left click and drag the mouse to the right.


A pop up box displays the duration of the task.

- ▶ Release the mouse button when the task is 5d.

| Line | Name          | Duration | Start     | Finish     |
|------|---------------|----------|-----------|------------|
| 1    | Design        | 2w       | 13/02/201 | 24/02/2012 |
|      | Set up site   |          |           |            |
| 2    | Start on Site |          | 13/02/201 | 13/02/2012 |



- ▶ The task will remain selected (Highlighted in black)

 The task is changed in time units as set by the 'Snapping Time Unit'


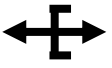
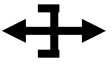
- ▶ Click away from the task to deselect it & it is displayed green again.


## Moving and editing tasks

Tasks can be moved and edited using either the mouse or the **Object Edit Toolbar**.


To edit your tasks on the **Bar Chart**:

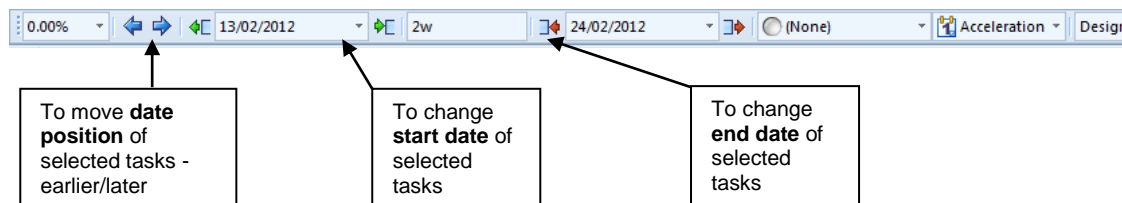
- ▶ Point your cursor at the task you wish to edit.
- ▶ Your cursor will change shape:

|   |  |
|---|--|
|  | Select / Move task<br>Place mouse cursor in the centre of a task. Left click & drag<br>While this cursor shape is showing an item can be selected or moved.  |
|  | Adjust start date of task<br>Place mouse cursor at start of a task. Left click & drag<br>While this cursor shape is showing the start date of a task can be moved without affecting the end date.  |
|  | Adjust end date of task<br>Place mouse cursor at the end of a task. Left click & drag.<br>While this cursor shape is showing the end date of a task can be moved without affecting the start date. |

 To **delete** a task, first select it, then press delete on the keyboard

Using the **Object Edit Toolbar**:

- ▶ Select a task on the **Bar Chart** using the  cursor as shown above.
- ▶ The **Object Edit Toolbar** is now displayed at the foot of the screen.




The screenshot shows the Object Edit Toolbar with three callout boxes:

- To move date position of selected tasks - earlier/later:** Points to the left and right arrow icons.
- To change start date of selected tasks:** Points to the date field showing 13/02/2012.
- To change end date of selected tasks:** Points to the date field showing 24/02/2012.

## Moving bars vertically

When you have listed out your task you are still able to change the order of those tasks at anytime

To move *before start on site* to the top of your project:

- ▶ Left click and hold just to the left hand side on the **line number** for the task you want to move. You should see the  cursor

| Line | Name          | Duration | Start     | Finish     | January |    |    |    |   | February |    |    |   |    |    |    |  |
|------|---------------|----------|-----------|------------|---------|----|----|----|---|----------|----|----|---|----|----|----|--|
|      |               |          |           |            | 9       | 16 | 23 | 30 | 6 | 13       | 20 | 27 | 5 | 12 | 19 | 26 |  |
| 1    | Design        | 2w       | 13/02/201 | 24/02/2012 |         |    |    |    |   |          |    |    |   |    |    |    |  |
| 2    | Set up site   | 1w 3d    | 16/02/201 | 27/02/2012 |         |    |    |    |   |          |    |    |   |    |    |    |  |
| 3    | Start on Site |          | 24/02/201 | 24/02/2012 |         |    |    |    |   |          |    |    |   |    |    |    |  |

- ▶ Click and drag the bar to the new line above.

## Inserting bars

You can insert new lines into your project to put new tasks on or just to space exiting tasks for formatting purposes.

- ▶ *Left click* on the **line number** below where you want to insert your new line.
- ▶ *Right click* and select **Insert Bar** or press **insert** on your keyboard
- ▶ A blank bar will be inserted above the currently selected bar.

## Milestones

Milestones are used to display key dates or events in our project and have zero duration.

To create a **Milestone**:

- ▶ Name the task in the normal way. Enter **0 (zero)** in the duration column. The 0 will not display as the default is to not show zeros

| Line | Name | Duration      | Start | Finish     |            |  |
|------|------|---------------|-------|------------|------------|--|
| +    | 1    | Design        | 1d    | 16/02/2012 | 29/02/2012 |  |
| +    | 2    | Set up site   | 1w 3d | 16/02/2012 | 27/02/2012 |  |
| +    | 3    | Start on Site |       | 16/02/2012 | 16/02/2012 |  |
| +    | 4    | Meetings      | 4d    | 16/02/2012 | 24/02/2012 |  |

Milestones can be either a **Start** or **Finish** milestone. **Start** Milestones will show at the start of a working day, whereas **Finish** milestones will show at the end of the working day. E.g. if a task is completed on Friday afternoon, a **Start Milestone** will appear on Monday morning. A **Finish Milestone** will appear at the end of Friday afternoon. By default you will create Start milestone. (This is set in the bar chart default settings)

To change a Milestone into a **Finish Milestone**: response

- ▶ Right click on the Milestone. Select **Make into – Finish Milestone**.

## Task-per-line mode


In **Asta Powerproject**, It is possible to display more than one task on a bar. This is useful if you have several tasks of the same type or you have a process made up of a number of single tasks. **Asta Powerproject** can separate tasks that exist on the same line by dropping them down onto separate lines. This is achievable by using **Task-per-line** mode.


To create multiple tasks on the same line, either:

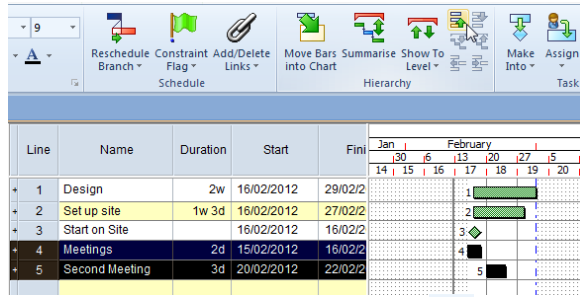
- ▶ Draw more than one task onto the same line in the **Bar chart**.

| Line | Name | Duration      | Start | Finish     |            |  |
|------|------|---------------|-------|------------|------------|--|
| +    | 1    | Design        | 2w    | 16/02/2012 | 29/02/2012 |  |
| +    | 2    | Set up site   | 1w 3d | 16/02/2012 | 27/02/2012 |  |
| +    | 3    | Start on Site |       | 16/02/2012 | 16/02/2012 |  |
| +    | 4    | Meetings      | 2d    | 15/02/2012 | 16/02/2012 |  |

Or if you have already created the tasks on separate lines:

 To specify a **Finish-to -Start** relationship between tasks on the same line **no link** is required.

- ▶ Select the line numbers of the tasks you wish to place on one line
- ▶ On the **Home** tab, click the **Roll up tasks**  command



The process can be reversed using the **Unroll task**  command.

## Linking tasks

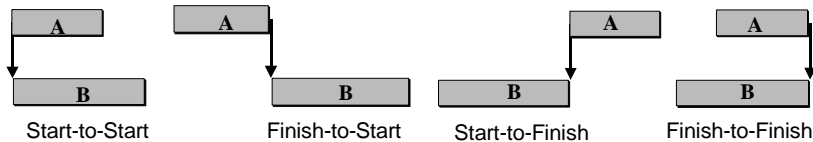
Once you have entered in your tasks you will need to consider the order that you wish to approach those tasks. It is possible at this point to move the tasks into order by selecting the start and finish dates that you wish to use.

However, in order for the software to understand the order that you wish to work through your project, you will need to **link** your tasks to indicate how they relate to each other.

## Link types




**Links** can be drawn starting and ending anywhere along the length of a task and you can link tasks in many different ways. The type of **link** used depends on the nature of the relationship between tasks.

There are 4 types of link:




In all cases, the direction of the arrow controls where the next task appears (A controls where B appears).

**Links** are drawn between tasks using following **cursor shapes**:

|   |  |
|---|--|
|  | <b>End link Cursor</b><br>This cursor shape indicates that you are linking from / to the <i>end</i> of a task  |
|  | <b>Start link Cursor</b><br>This cursor shape indicates that you are linking from / to the <i>start</i> of a task  |
|  | <b>Mid-link Cursor</b><br>This cursor shape enables you to link from / to any <i>midpoint</i> along the length of a task. A pop up box will indicate your exact position during the task. E.g. 3 days into a 10 day task |

To draw a finish to Start link between 2 tasks:

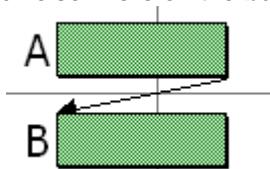
 To select a link point to it & left click.



- ▶ Place the mouse at the end and at the top or bottom corner of the first (predecessor) task to display the end link cursor.
- ▶ Left click & drag to draw the link to the start of the corresponding (successor) task.
- ▶ Release the mouse when the start link cursor is displayed.

A link is made between the 2 tasks. The link arrow is green. This means that the link is selected.

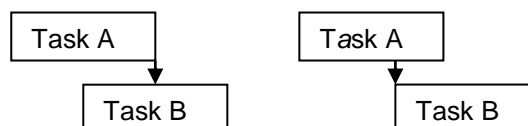
- ▶ Click elsewhere on the **bar chart** to deselect the **link**.



This now tells **Asta Powerproject** that task B cannot start before task A is finished.

Sometimes it is necessary to show that tasks will happen simultaneously.

To show this a link is drawn starting or ending somewhere along the length of a task known as a **mid-link**.

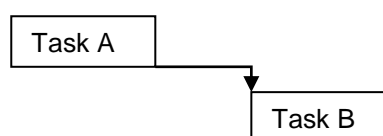


To draw a **mid-link**:

- ▶ Place the cursor at the start of the predecessor task. Without pressing move the cursor to the right so that the mid-link cursor is displayed.
- ▶ A pop up box will indicate where during the task you are linking from.
- ▶ Left click at the desired position and drag to move the pointer to the desired position on the successor task.
- ▶ Release the mouse when the corresponding link cursor is displayed.

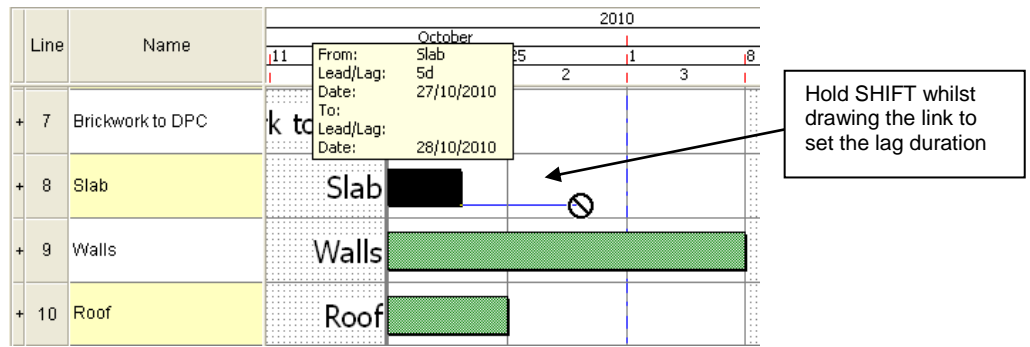
## Drawing links with lead/lag time

There may be times when you need to insert a period of waiting or delay into your project, e.g. waiting for paint to dry or concrete to cure.

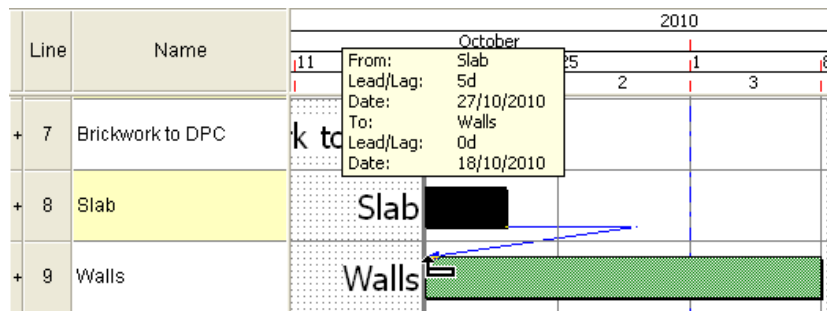


- ▶ Move the cursor to the bottom right hand corner of the predecessor task so that the end link icon appears, left click and keep the mouse button held down.
- ▶ Press and hold the **Shift** button on the keyboard and with the mouse button still held down drag the cursor horizontally. A pop up box will appear displaying the lead/lag duration.

*If the pop up box does not appear when the mid-link is displayed go to the **Tools** tab, select **Options**, then find the **General** tab and put a tick in the box to **show lead/lag pop up**.*



- ▶ Once you have reached the desired duration release **Shift** but **keep hold of your mouse button** and drag it over to where you want to end the link and let go.



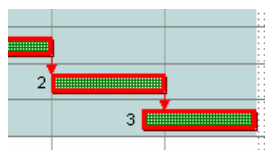
You can also create a lag link by:

- ▶ Drawing a standard Finish to start Link
- ▶ Editing the link properties in the object edit toolbar

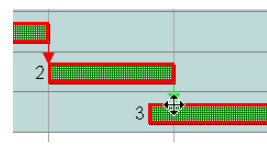
### Moving/Editing Links

If you have drawn a link incorrectly, you can simply 'drag' the link to the correct position, rather than deleting & re drawing the link.

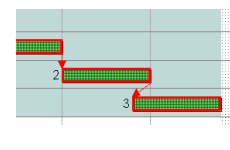
- ▶ Select the link (it will show as green)
- ▶ Hover the cursor over the end of the link you wish the move until a 'cross' cursor becomes visible.
- ▶ The link can now be dragged to the correct position



The link should have been to the start of task 3



When the link is selected the Drag/Move Cursor can be displayed



Pull the link to the correct position on the task

Multiple links in a sequence can be highlighted by selecting the first link in the sequence, holding the SHIFT key and selecting the last link in the sequence.

### Block linking

If you have more than 2 tasks to link together e.g. a whole section of work, the link tasks toolbar button can be used.

- ▶ Select the tasks that you want to link.

To link tasks that are next to each other on your chart click on the line number of the first bar. Left click & drag downwards to select adjacent bars.

To link tasks that are not next to each other on the chart hold the **ctrl** button on keyboard while clicking on line number the task you want to link.

- ▶ Click on the **link tasks** toolbar button.

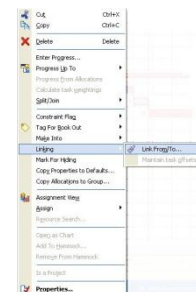



Finish to Start links are placed between each of the tasks.

## Linking tasks without drawing on the Bar Chart

As well as drawing links directly onto the Bar Chart using the mouse, you can also link tasks by selecting one or more tasks in the Bar Chart and specifying the task you want to link to by name. Creating links in this way is an easy way to link tasks which are not close to each other in the Bar Chart.

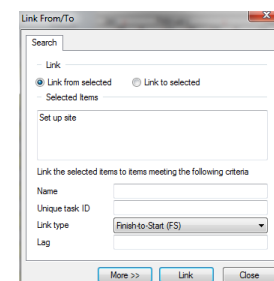
- ▶ Right click on a task or tasks on the Bar Chart.
- ▶ Select **Linking, Link From/To**



 The Link From / To dialog can also appear when you draw a link into a blank area of the Bar Chart, i.e. do not complete link to a successor task. Go to **Tools** tab, select **Options**, then find the **Edit** tab and select the **Display Link From/To** radio button.

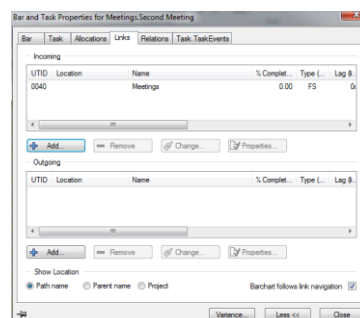
The **Link From / To** dialog is displayed:

- ▶ Indicate whether you are linking from or to the selected task(s).
- ▶ Identify the task you are linking to.
- ▶ Select the type of link.
- ▶ Press **Link** and **Close**.



## Navigate the Logic and Edit the links

You can use the links tab of the Task properties dialog box to navigate through the logic of your project.



- ▶ When you double click on a link, the task at the other end of the link (predecessor or successor) is centred in the Bar Chart window. This new task is now the subject of the task properties dialog.

To edit the links:

- ▶ Select your **Incoming** or **Outgoing** link shown in the box above
- ▶ Choose whether to **Add, Remove, Change** or go to the **Properties** of the chosen link, via one of the buttons displayed

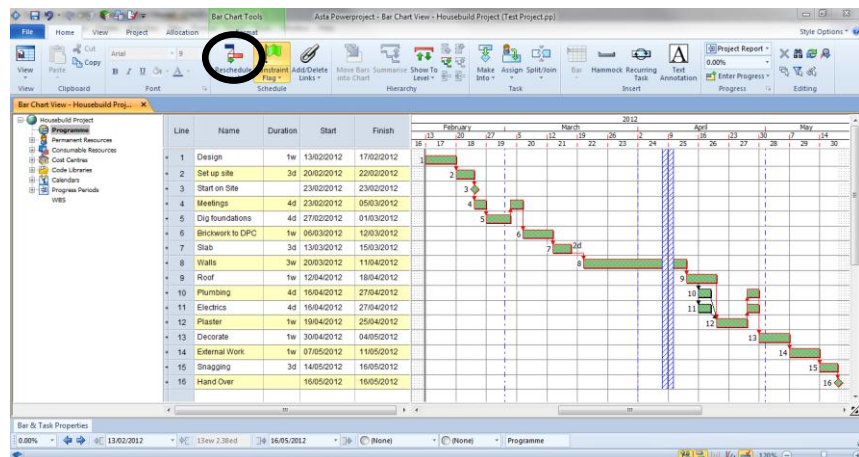
## Reschedule

When you have linked your tasks you can **Reschedule** the project. The reschedule performs a series of actions:

- ▶ Places the start of the first task at the beginning of the project.
- ▶ Calculates the optimum start and end dates of all tasks according to the logical links applied.
- ▶ Calculates whether a task has any float attached.
- ▶ Shows whether a task is Critical (Critical Path Analysis).
- ▶ Identifies any constraints which have been exceeded.
- ▶ Calculates the earliest project end date.

To **Reschedule** the project:

- ▶ On the **Home** tab and click the **Reschedule** command



- ▶ The critical path of the project is shown outlined in red.

In Version 12 of **Asta Powerproject** you are able to specify how the critical path shows on tasks which are partially critical.

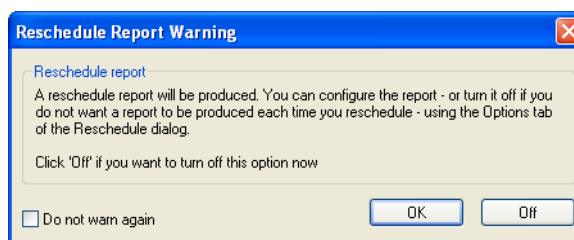
To show only Partial Criticality:

- ▶ On the **Format** tab, select **Format Bar Chart**.
- ▶ In the **Schedule Tab** tick **Part Critical Shading**

## Reschedule Report

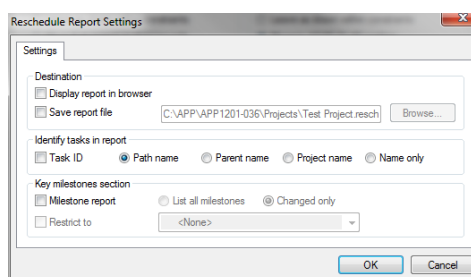
Once you reschedule your project, a box may appear asking if you would like to view the reschedule report.

The reschedule report is a comprehensive breakdown of what impact the reschedule has had on your project. If you do not wish to see the report then select 'Off'.



To switch the report back on, you will need to:

- ▶ Open the **File** Tab
- ▶ Select **Options**
- ▶ In the pop up, select the **Reschedule** tab and select **Settings** in the Reschedule Report area.



- ▶ Tick **Display report in browser**

## Changing the project start date

The start date of the project can be changed at any time. This will control when the first task in your project will reschedule to.

To change the **Start date**:

- ▶ In the **File** tab, select **Advanced Properties**
- ▶ Change the **Imposed Start** to the new project start date.
- ▶ Click Close.
- ▶ **Reschedule** the project to see the new start date take effect

## Constraints


Once the tasks have been linked and rescheduled, your project will be laid on the most logical order. What we have yet to take into consideration are any fixed dates that will need to be adhered to, such as a specific start on site date or a contract completion date.

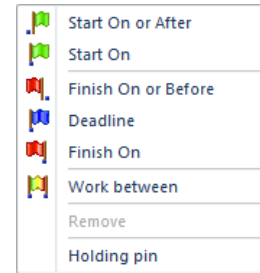
To show fixed dates in your project, and to show the impact they have on the rest of the tasks in your project you will need to use Constraints on those tasks.

## Adding a constraint

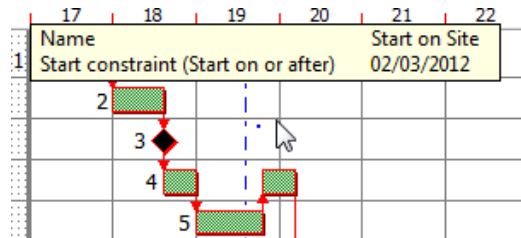
To add a constraint to a task:

- ▶ Select the task you wish to constrain








- ▶ On the **Home** tab click on the drop down arrow under the constraint  command
- ▶ Select the constrain you wish to impose on the task



- ▶ Click and drag the constraint to the required position

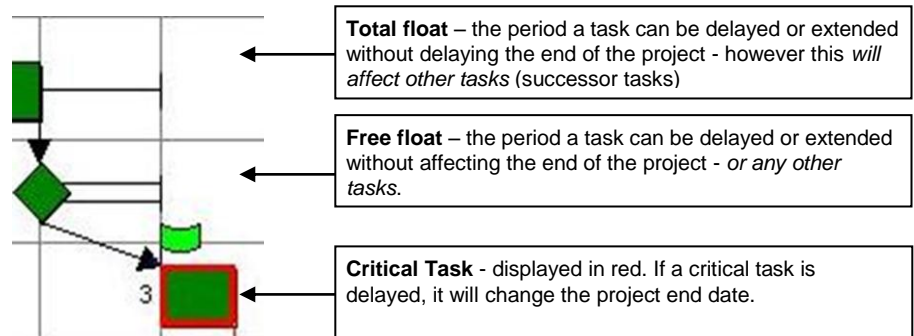


### Types of Constraint

|   |   |
|---|---|
|    | Start on or after.<br>A soft constraint which will not allow the task to start before the constraint date, however to could move to a later date. |
|   | Start on<br>A hard constraint which will fix the start of the task to a constraint date   |
|  | Finish on or before<br>A soft constraint that will not allow the task to end after the constraint date, however it could finish earlier.          |
|  | Deadline<br>A soft constraint which works as a warning but will allow the project to move beyond the target deadline.                             |
|  | Finish on<br>A hard constraint that will fix the end date of the task to the constraint date  |
|  | Schedule between<br>A soft constraint that will allow either the start or the end date to be constrained between                                  |
|  | Holding pin<br>A Constraint which will move with the task if the task is manually moved.  |

### Reschedule results

Rescheduling a project with constraints will affect the appearance of tasks & may result in some items showing **Float**.



## Structuring the project


Project management is not only about defining tasks and setting up their dependencies, it is also about organising the different parts of a project into a coordinated whole.

Asta Powerproject lets you organise your project using Summary Tasks to group related tasks together and this section explains how you can use summary bars to structure your project in a logical format.

### Creating summary tasks

Summary tasks are useful for grouping related activities together in sequential order. A summary task takes its position and duration from the position and duration of the tasks within the summary group. It provides 'rolled up' information relating to all tasks within the summary and gives the user control over displaying each & every task in the project or displaying only the summarised information.

To summarise tasks in the project:


- ▶ Highlight the bars you wish to group together by clicking and dragging on the line numbers within the table.
- ▶ On the Home tab click the **Summarise** command. 
- ▶ A summary bar appears on the **Bar chart**

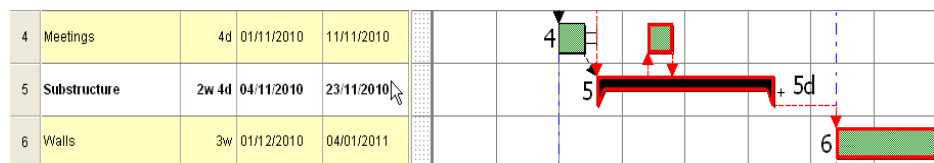


- ▶ Enter a name for the summary bar in the table e.g. *Substructure*

You can now choose to hide the tasks that are part of the summary group from the chart so that only the summary bar & 'rolled up' details are displayed.



### Opening and closing summary tasks:

- ▶ On the **Bar Chart**, place the cursor over the summary task so that the sweet wrapper cursor is displayed  and **double-click**.
- ▶ The individual tasks are hidden from view.



- ▶ *Double click* again to display the tasks.

### Adding & Removing tasks into Summary Groups

- ▶ Select the bar(s) by clicking on the line number.
- ▶ On the **Home** tab click on the **indent** button on the toolbar. 
- ▶ Bars are added to the summary that is above.
- ▶ To remove tasks from a summary group, use the **outdent** button. 



**DO NOT delete summary/expanded tasks as this will also delete all of the contents from your project.**

## Removing Summary Tasks

- ▶ Select *all of the contents* of the summary group.
- ▶ Click the **outdent** button from the toolbar.

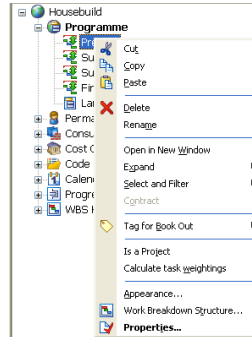
If there are no contents in the summary group the summary task no longer exists.

## Summary bar level formatting

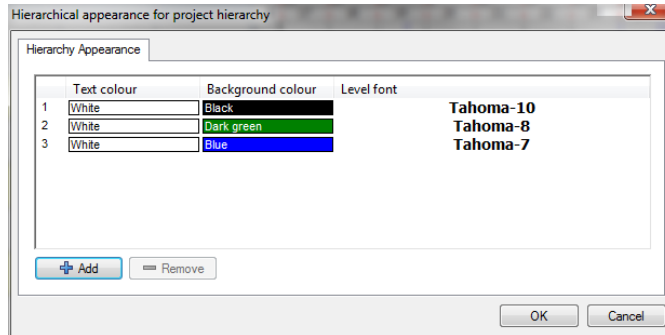
The spreadsheet cell font and colour, as well as the background colour for that row on the bar chart, can now be set for a Summary/Expanded task in the Project View. The colouring is set for each level of the project, so more than one summary may have the same colour.

To alter the appearance of the summary bar/Expanded task:

- ▶ In the **Project view** right click on the Summary bar that you wish to colour and select **Appearance**



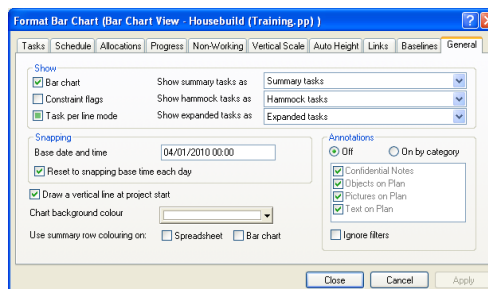
- ▶ Choose the Text colour and Background colour



Once the level colouring is set, it will need to be turned on in the **Bar chart**.

To turn the colour on:

- ▶ On the **Format** tab, click the **Format Bar Chart** command

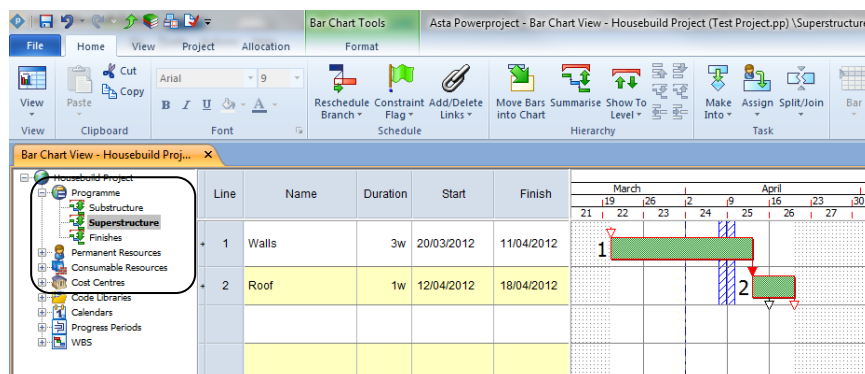




## Using the project view to navigate your project

The structure of our project is clearly displayed in the **Project View**.

- ▶ Click on the '+' sign to open the contents of heading. **Programme** is usually the top level.
- ▶ Select any of the summary groups to display only that section of work on the **Bar Chart**



## Code libraries

**Code Libraries** allow us to colour-code tasks so that their appearance represents something relevant. A project can contain many code libraries, which can be hierarchically based.

The codes are created in the **Library Explorer**.

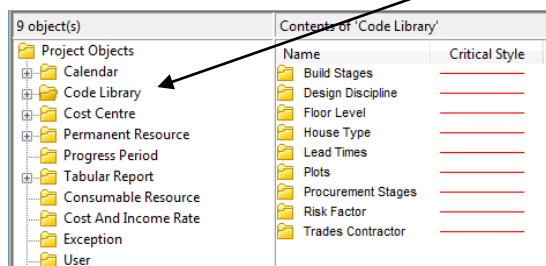
## Creating code libraries


For this example we will create a Code Library for Contractors used in the project.

On the **View** tab click the **Library Explorer** command.

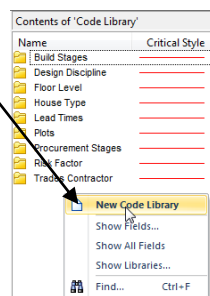


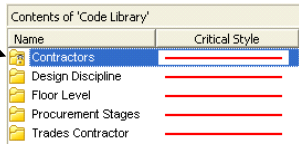
- ▶ In the left window of Library Explorer, click on the Code Library folder.

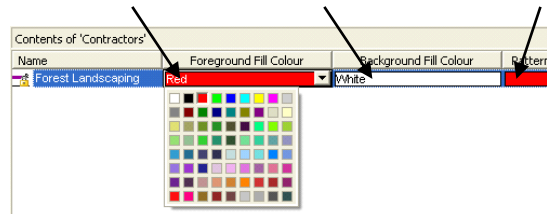


 The **Construction Template** will already contain a selection of **Code Library** folders. These can be edited or you can add your own to the list.

- ▶ In the right window, on a blank part of the screen, right click and select **New Code Library**.



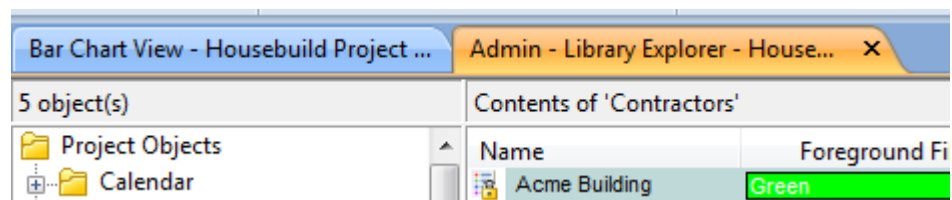
- ▶ Give it a name 
- ▶ In the right window, Contractors folder. *double click on the*
- ▶ Right click in the right hand pane and choose **New Code Library Entry**.
- ▶ In the Untitled box type in **'Forest Landscaping'** to represent our first contractor.
- ▶ Click under **Foreground Fill, Background Fill and Pattern** to select colours and patterns to identify this contractor.



- ▶ *Right click* under Forest Landscaping to create a new code entry for Janson's Timber.
- ▶ Repeat the process until all contractors are added. The other contractors are; Acme Building, Goldstone Utilities and Smarts Decorators

To return to the project:

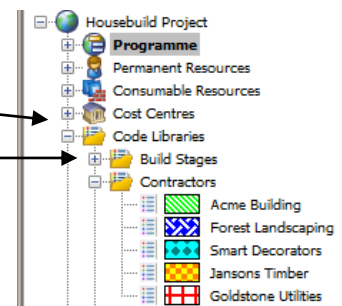
- ▶ Click on the **Bar Chart View** Tab above the library explorer



### Allocating codes

Now that the Code Libraries have been created we can apply these to tasks within the project. To do this we will use the Project View

- ▶ To expand the list of Code Libraries in the Project View, click the + to the left of **Code Libraries**.
- ▶ To expand the list of Contractors codes, click the + to the left of Contractors.

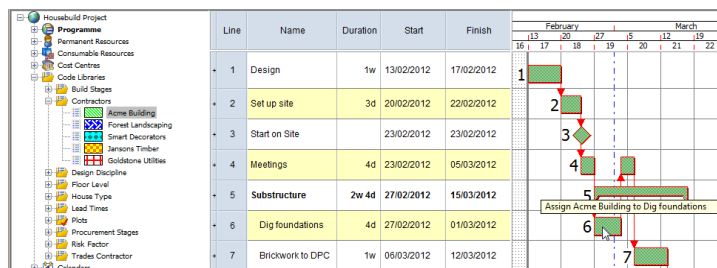


 If required the colours selected for your code library entries can be made visible in the project view. Go to **Tools – Options – View & tick box** at the bottom to **'Show code library appearance'**.

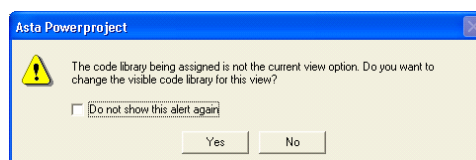
### Single Task allocation

To allocate Acme Building to Dig Footings:

- ▶ Place the cursor over the Acme Building code entry in the Project View
- ▶ Press the left mouse button and drag until the cursor is over the Dig Footings task, then release.



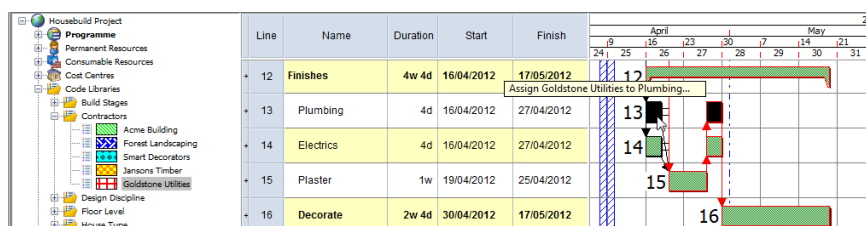
You will get the following message. Click **Yes** to apply the new Code Library colour



## Multiple task allocation

To allocate Goldstone Utilities to both plumbing tasks:

- ▶ Select First Fix and Second Fix (of plumbing) by holding down **CTRL** and clicking them
- ▶ Place the cursor over the Goldstone Utilities code entry in the Project View.
- ▶ Press the left mouse button and drag the cursor to one of the Plumbing tasks then let go of the mouse.

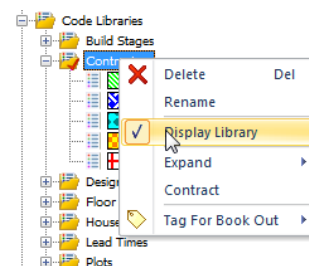


- ▶ Click away to deselect and the bars will change colour.

## Switching the display between code library folders

Powerproject will only allow you to display one Code Library at a time on your tasks. To switch between folders:

- ▶ In the Project View, *Right Click* on the Code Library Folder you wish to display and select **Display Library**
- ▶ The red tick indicates the code library currently on display.



To remove the display of Code Libraries:


- ▶ *Right Click* on the Folder that is on display (shows a red tick)

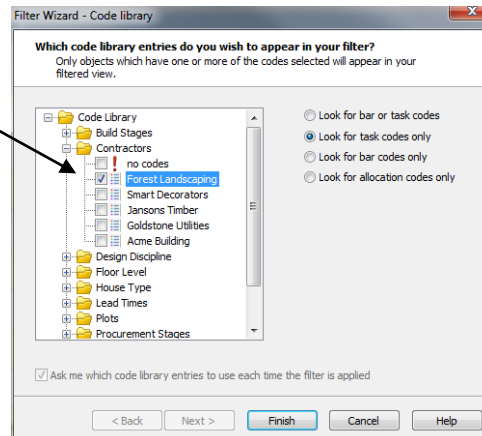
Select **Display Library** to remove the display of this library. No code libraries are now selected to be on display.

## Simple filters

Now that the project is coded, filters can be used to show only the tasks with a certain code.

To run a filter on the **Forest Landscaping contractor** code:

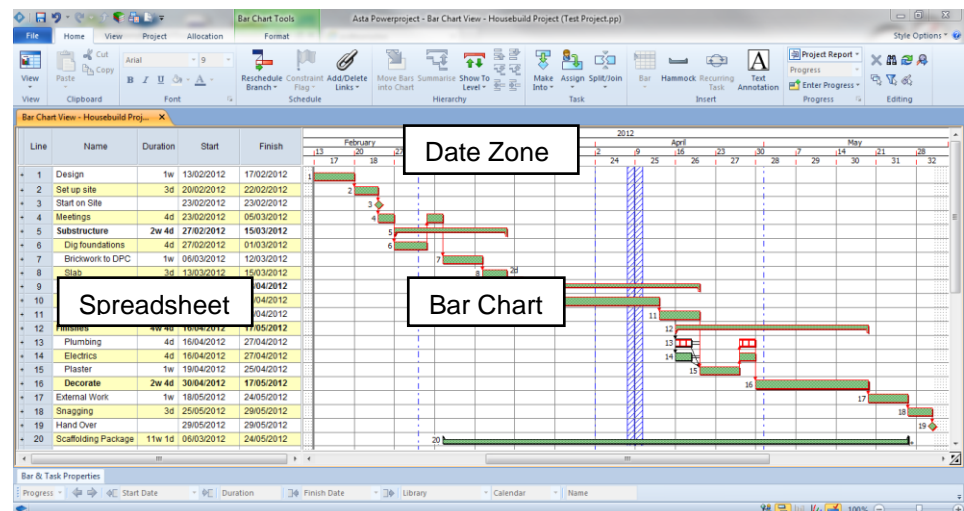
- ▶ On **View** tab click on the **Filter**  command. Under the Codes category, select Which Code (Asks for codes)
- ▶ Click on the **+** against **Contractors** and tick the box next to **Forest Landscaping**.



- ▶ Click on **Finish** and run the filter.
- ▶ To stop a filter running, click on the **Filter** command and select **No Filter**.

## Editing the view

The 'view' of your project is made up of 3 areas. Changes can be made to the appearance of each of these areas independently.

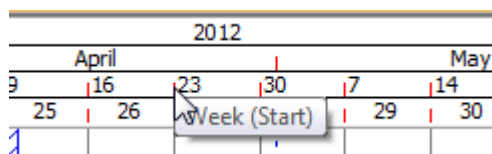


## The Date Zone

The Date Zone is the area where date information relevant to the project is displayed. By default the Date Zone shows 4 rulers (Date lines) running across the top of the project, these are the Year, Month, Week Start and Project Week Numbers (elapsed weeks).

## Adjusting the scale of the Date Zone

You can adjust the scale of the project on screen by adjusting the date zone scale,



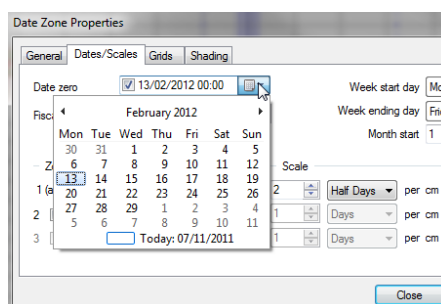
- ▶ Place the mouse in the Date Zone area on any of the red lines (tick marks)
- ▶ Left click and drag the mouse either left or right.

## Week Numbering

Week 1 in the Date Zone will default to the project's start date when the project was first created. This is displayed in the 'elapsed week' line.

To align week 1 to another date:

- ▶ Place your cursor anywhere in the Date Zone area and **right click**.
- ▶ Select **Properties**.
- ▶ Select the **Dates/Scales** tab.



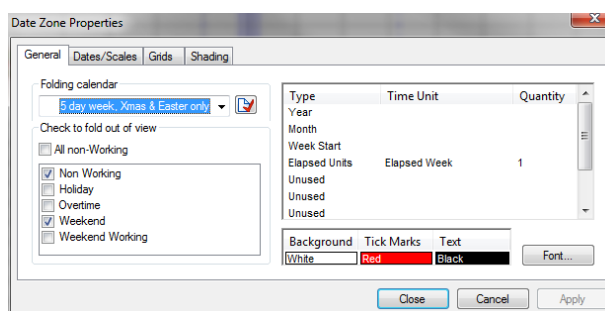
- ▶ Against '**Date Zero**' use the date picker from the drop down arrow to choose your new week 1
- ▶ Click **Close**

## Adding/editing rulers on the Date Zone

The Date Zone can contain up to 10 rulers of date information across the top. To control the information that is displayed:

- ▶ Place the cursor anywhere in the Date Zone area and **right click**.
- ▶ Select **Properties** from the list.

The General tab controls the folding Calendar & the date ruler on display.



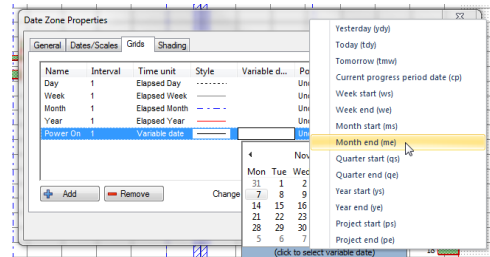
- ▶ To add a fifth ruler, click once on an unused ruler and select from the drop down list.
- ▶ To remove any of the rulers first select and then choose **unused** from the list.
- ▶ Click on **Apply** to see the changes on your project.

## Grid Lines

The construction template supplied with Asta Powerproject comes with some grid lines, Year, Month, Week and Day.

A vertical grid line that occurs at a variable date specified by you can also be added to the project. E.g. a line that shows at 'Today's Date' or the 'End of week'.

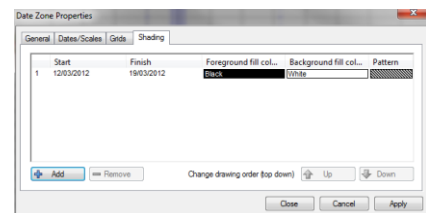
- ▶ Select the **Grids** tab from the Date Zone Properties dialogue
- ▶ Click **Add** to add a new grid line.
- ▶ Enter a new **Name**
- ▶ Left click in the **Time Unit** column and change Elapsed Week to Variable date
- ▶ Click on the thin black line and change the line **Style** to how you want your line to look
- ▶ Then left click in the empty space where the **Variable date** will be and a date picker will appear, choose your date or click on 'Click to select variable date'
- ▶ Press **Close**



## Shading

Asta Powerproject can also put shading behind the tasks within the project, it has no affect on the project but it can be used to show certain information i.e. bad weather, school term times etc.

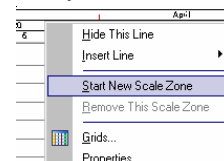
- ▶ Select the Shading tab from the Date Zone Properties dialogue
- ▶ Enter the Start and End dates for the shading or a 'Variable Date' (see grids) from the list and then choose a colour.
- ▶ Click Close to close the properties dialog. This will also 'Apply' changes.



## Slicing the Date Zone

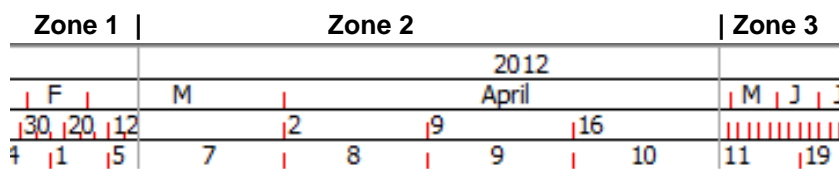
The Date Zone can also be 'split' into two or even three different scale zones, so that all three areas can be scaled separately.

- ▶ Place the mouse in the Date Zone, over the area you want the new section to begin.
- ▶ *Right click* with the mouse.
- ▶ Select **Start New Scale Zone**.



A faint grey line will appear at the point of clicking, dragging any of

the red lines either side of the grey line will adjust the scale ONLY in that area.

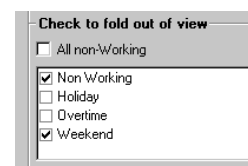


To remove a scale zone:

- ▶ *Right click* on the right hand side of the line you wish to remove
- ▶ The line will be removed and the scale will revert to how it currently looks on the left hand side.

## Hiding non-working time

- ▶ Select from the options to ensure that non working time is *not* displayed in your folding Calendar.

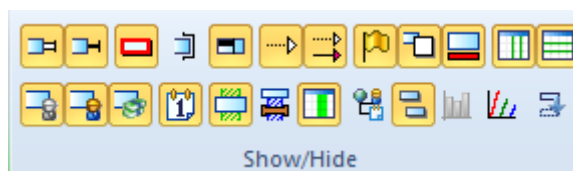


## The Bar Chart

There are many Bar Chart attributes that you can switch on and off to tailor the chart display exactly to your needs. For example, you might prefer to turn float off and links off and even the Critical Path.

The majority of changes to formatting can be found in the **Format** tab.

The most popular formatting changes can be made using the **Show/Hide** toggles, which turn on or off various items of the display.



There are also a number of keyboard short cuts which can be used:

|  |                       |             |
|--|-----------------------|-------------|
|  | Free Float            | Alt+Shift+F |
|  | Total Float           | Alt+Shift+T |
|  | Critical Path         | Alt+Shift+C |
|  | Progress Lines        | Alt+Shift+S |
|  | Progress Shading      | Alt+Shift+P |
|  | Non-driving Links     | Alt+Shift+K |
|  | All Links             | Alt+Shift+L |
|  | Constraints           | Alt+Shift+Q |
|  | Annotations           | Alt+Shift+N |
|  | Baselines             | Alt+Shift+B |
|  | Demand Allocations    | Alt+Shift+D |
|  | Scheduled Allocations | Alt+Shift+A |
|  | Cost Allocations      | Alt+Shift+O |
|  | Grid Lines            | Alt+Shift+G |
|  | Ruling Lines          | Alt+Shift+R |
|  | Datezone              | Alt+Shift+Z |
|  | Non-working Shading   | Alt+Shift+H |
|  | Vertical Shading      | Alt+Shift+V |

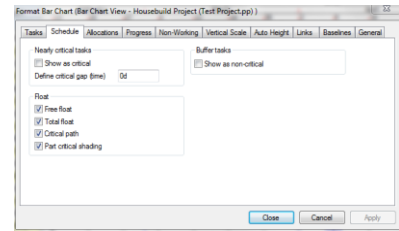
For further formatting options it may be necessary to go to the **Format Bar Chart** command to bring up the full list of formatting options.

- ▶ On the **Format** tab, click on **Format Bar Chart** command



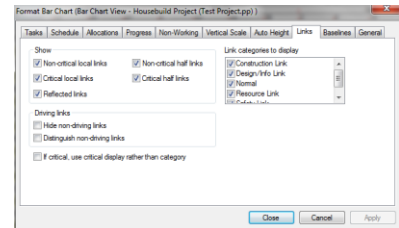
## Schedule tab

- ▶ Un-tick Free float, Total float and Critical path to hide these on the bar chart



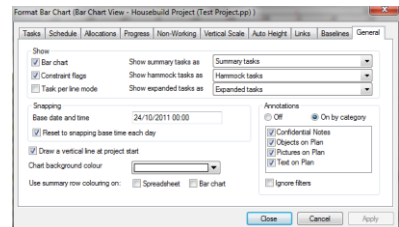
## Links tab

- ▶ Un-tick the link types shown under the 'Show' section to hide these links on the bar chart



## General tab

- ▶ Un-tick Constraint flags to hid these on the bar chart



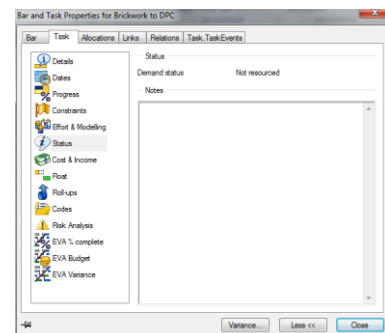
The Undo button does not affect these changes to the appearance of the project.

## Display notes on tasks

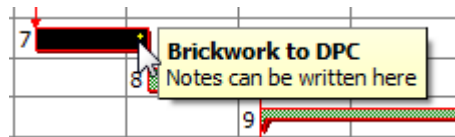
Notes can be added to task properties and displayed via a pop up window on the Bar Chart.

### To add notes to a task:

- ▶ Right click on the task.
- ▶ Select **Properties**.
- ▶ On the **Task** Tab select **Status** from the list on the left hand side.
- ▶ Notes can be written into the space.



If the tick box on the task tab of the Format Bar Chart dialog is checked, an indicator will be visible in the top right corner of the task. Place cursor on the task and the notes are displayed in a pop up window.



These notes can also be displayed in a Spreadsheet column using the Identification token for Notes.

## The Spreadsheet

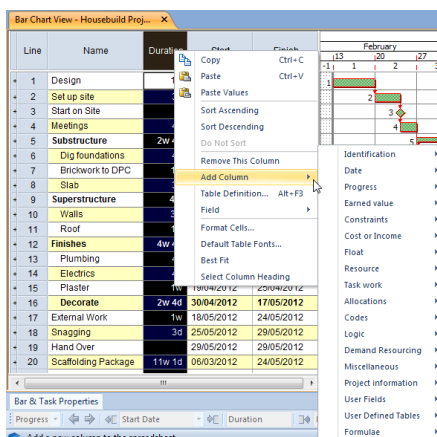
The Spreadsheet can be customised to display whatever project information you choose. Columns contain Fields which read data from your project, End date, Start date, Percent Complete and can be added, edited and deleted.

The Spreadsheet can be saved as a table so that it can be applied to other Bar Chart views. For example, you might have one table for entering new tasks and another for assigning progress.

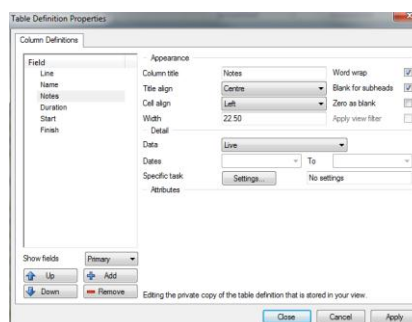


## To add new columns

- ▶ Right click on an existing column heading and select **Add Column**



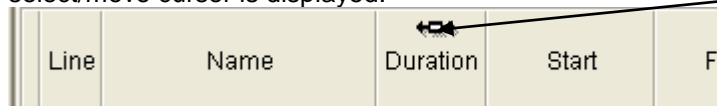
- ▶ Choose a Field category (e.g. Identification) and then choose a field (e.g. Notes)
- ▶ In the **Table Definition Properties** pop up that ensues you will be able to change the settings for that column.




- ▶ Click **Close** once you have made your changes.

## To move the position of columns

- ▶ Place the cursor at the top of a column heading so that the select/move cursor is displayed.



When  cursor is displayed, left click and drag to move column

- ▶ *Left click & drag* column to desired position.

## Saving the Spreadsheet

You can save the columns that have been created as a table, which will allow you to switch between the different tables as required.

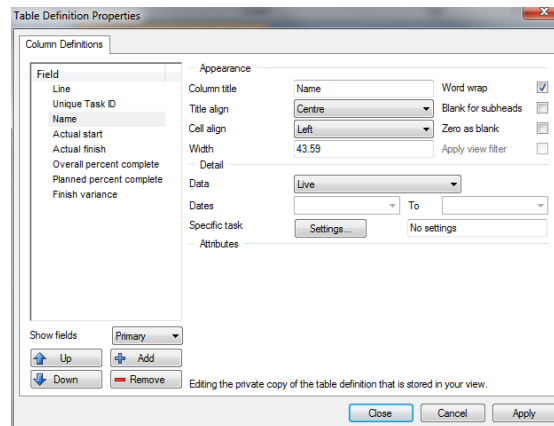
- ▶ In the **View** tab, click the **Table** command
- ▶ Select **Save As**
- ▶ Give your table a new name

- ▶ Choose a **Category** for the new table to be saved in
- ▶ To switch between different tables, in the **View** tab, click the **Table** command and select from the list of saved tables

## Table definition

The Table Definition can also be used to create new tables and is useful for setting more specific attributes to produce more advanced tables e.g. changing a column title, referencing a token to a baseline rather than to the live project.

- ▶ Right click on a column heading and select **Table Definition**



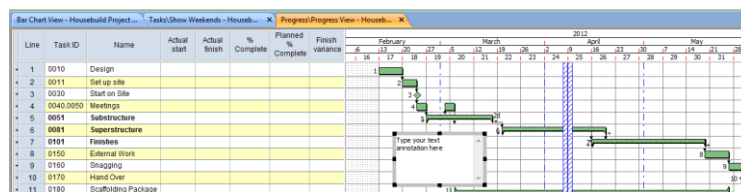
- ▶ In **Column title** change the title of your column
- ▶ Click **Close**

## Annotations

Annotations are text and graphics that you can include on bar charts to enhance the presentation of your project.

### Creating text annotations

- ▶ On the **Home** or **Format** tab, click the **Text Annotation** command
- ▶ Take the cursor onto the bar chart. Your cursor will be a letter 'T'.
- ▶ *Left click and drag* the mouse downwards & to the right to **draw a box**.

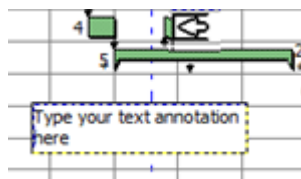


- ▶ Type the text that you want in the text box.
- ▶ The text colour, font, style and size can all be adjusted using the **Font** section of the **Home** tab.
- ▶ Click away to deselect the box.

### Attaching annotations to tasks

Text annotations can be created to refer to specific tasks in your project. In this case the text box can be attached to the task so that it stays with it should it move in your project

- ▶ Click on the annotation you wish to move
- ▶ Hold the left mouse button down, and drag the annotation toward the task you wish to attach it to

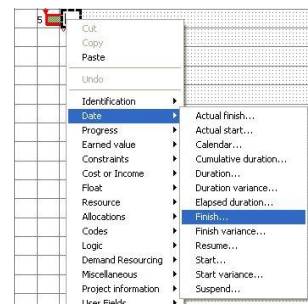


- ▶ The cursor will change shape to indicate how the text box will attach to the task

## Inserting fields into text annotations

You may type project or task specific information into text annotations e.g. end dates or percent complete. However when the task is updated the annotation will not. Asta Powerproject can use 'Fields', which update according to current project data.

- ▶ *Double click* the text annotation so that the cursor is inside ready to type.
- ▶ *Right click* to display a list of available 'Fields'.
- ▶ Select a field as required e.g. select Date – Finish.
- ▶ Click **OK** at the pop up box.
- ▶ When deselected, the annotation will display the end date of the task. If the task should change the annotation will also be updated.



## Formatting the text annotation

The properties of the text box can be adjusted to control how it looks on your project e.g. whether there is a border, set the text into the background of the project or even make the task annotation appear only against specific tasks in our project.

- ▶ *Left click* once on the annotation to select it.
- ▶ Right click and select **Properties**.

Set a background colour and to display text in a 'box'

Set to display annotations 'in front' or 'behind' tasks on your chart

Tick here to make the annotation appear against every task or select a filter to control which tasks it appears on.

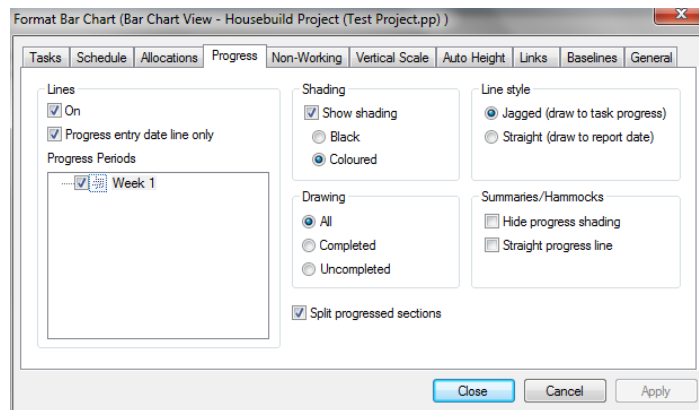
## Using progress

Once the project is underway, you should record its progress at regular intervals. Recording progress ensures that your project is kept up to date and lets you see if work is progressing as planned or if delays are creeping in. It also ensures that you know how much work remains to be done to complete the project and will also give you a projected project end date.

## Displaying progress in the bar chart

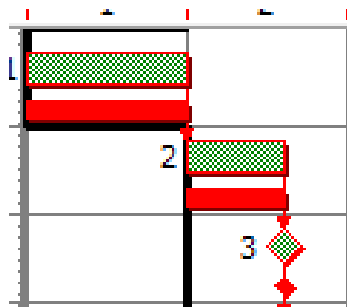
To view the progress drop line and shading on the tasks within the Bar Chart:

- ▶ On the **Format** tab, select **Format Bar Chart**
- ▶ Select the **Progress** tab




- ▶ Put a tick in the **Lines On** tick box
- ▶ If you tick the **Progress entry line only** option, the software will automatically show the drop line of the selected report date.
- ▶ If you want a specific progress drop line to show, select the progress period by placing a tick against that progress period.
- ▶ Select **Coloured** from the shading menu then **Close**.

The line will begin from your report date and 'jag' around the uncompleted tasks and baselines



You may also be able to choose this option by:

- ▶ On the **Format** tab, select the  command

## Entering Progress

There are numerous ways within **Asta Powerproject** to enter progress onto your tasks. The easiest way is to use the spreadsheet to enter the data.

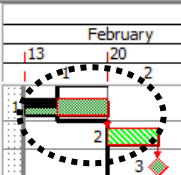
N.B The **% Complete** column here is independent of the duration of the task. It is the percentage of a tasks work that has been completed & will remain the same regardless of whether the task duration increases or decreases (e.g If you set the progress to 20% and then increase the task the percentage will remain the same). The Field used is **Overall Percent Complete**.

If you want to record the percentage according to the duration completed (e.g if you mark the progress as 20% and then increase the task the percent complete reduces) then you would need to choose the **Percent Complete** Field (see the section entitled **The Spreadsheet** for how to create this column using Fields) completed (Overall Percent Complete)

To show the progress specific columns:

- ▶ On the **View** tab, select the **Table** Command
- ▶ Under the **Progress** category, select **Progress – no baseline**. If this table is not present, add the following columns:
  - Name
  - Actual Start
  - Actual Finish
  - Overall Percent Complete (rename to **Percent Complete**)
  - Planned Percent Complete
  - Slip
- ▶ Any progress entered into the **Percent Complete** column will be added to the task, giving the task a scored through appearance.

| Line | Name          | Actual start | Actual finish | % Complete | Planned % Complete | Slip |
|------|---------------|--------------|---------------|------------|--------------------|------|
| + 1  | Design        | 13/02/12     |               | 40.00      | 100.00             | -3d  |
| + 2  | Set up site   |              |               |            |                    |      |
| + 3  | Start on Site |              |               |            |                    |      |



**N.B** If the above pop up doesn't appear this will be because the "Do not warn again" box has been ticked at some point. If this is the case you will need to carry out the following.

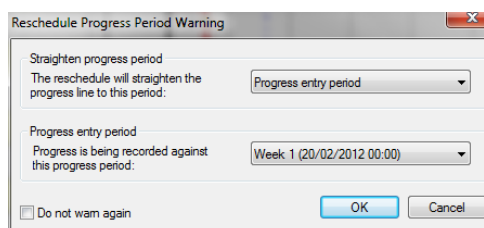
In the **file** menu, select **options** then the **general** tab. Choose **Do not show me again prompts** and click **reset**

## Rescheduling with Progress

To see the effects of the progress we will ask **Asta Powerproject** to straighten the progress line and move any uncompleted tasks to the right of the report date. If you have not baselined, then you need to be aware of the original end date of the project as straightening the line may affect the end date of the project. (The Undo option is available to rectify this)



- ▶ On the **Home** tab, click the **Reschedule** Command
- ▶ In the **Reschedule Progress Period Warning** pop up, the **Straighten progress entry period** should be set to **Progress Entry Period**. If you do not want to straighten the line, select **None**.



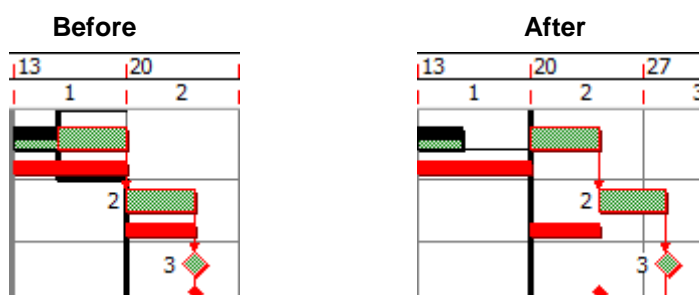
Reschedule Progress Period Warning

Straighten progress period  
The reschedule will straighten the progress line to this period: Progress entry period

Progress entry period  
Progress is being recorded against this progress period: Week 1 (20/02/2012 00:00)

Do not warn again OK Cancel

The progress line will straighten and the uncompleted section of the project will move to the right of the report date.



Once the line has straightened you can change the view to show the straight line progress as a jagged version; see the next section entitled '**Straight line to Jagged line display**'.

## Setting up the project to Print

As a general rule what you display on the screen is what will be printed.

Therefore, select the 'View' of your choice or manually change any formatting, tables etc to customise the display to what you wish to print.

The scale of the project can be adjusted for you to allow printing to a certain number of pages.

## Editing Details for display on your Borders

When you print an Asta Powerproject file it is printed with a border around the project. The border file enables you to display relevant project & company information along with your project data.

Some of this information, like the Project Name, Who the project is by & who it is for has already been completed and can be accessed:


- ▶ Select the **File** tab, selecting **Advanced Properties**

All further information, such as revision dates, programme numbers etc can be found:

- ▶ Select the **File** tab
- ▶ Click the **Print** command
- ▶ Choose **Full Preview**
- ▶ Click on the **output fields** tab.

## Printing the Project

As a general rule what you display on the screen is what will be printed. Therefore select the 'View' of your choice or manually change any formatting, tables etc to customise the display to what you wish to print

- ▶ Select the **File** tab and click the **Print** command or
- ▶ Click the Print button  on the **Quick Access** toolbar

## Output Tab

The output tab control where the print out is going to and what file type is going to be created if applicable. The main output options are:

- ▶ **Printer** – Tick Printer and choose your printer from the drop down list; from the properties button decide your printer orientation and size (standard printer usage) Press the Print button to activate Print
- ▶ **Clipboard** – Tick clipboard to have your print preview copied to the clipboard. You can then open Word, Excel etc right click on the page and select paste, to paste your print preview into the document. Press the Print button to activate the copy to clipboard.
- ▶ **Picture File** – Tick Picture file to have your print converted into a JPEG picture file, which can be inserted into Word, Excel, PowerPoint etc. Use the **Browse** button to choose where to save the new file and what filename to give it. Press the Print button to activate the file creation
- ▶ **PDF** – You can create a PDF but you must have a PDF creator amongst your printer drivers. (Consult your IT to have one installed)

The **Print Range** decides which pages of the project document you wish to print this time:

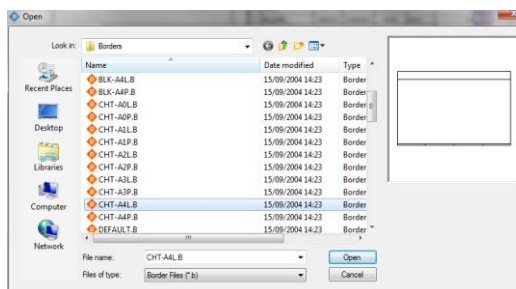
- ▶ **All** – Prints all pages
- ▶ **Selection** – Prints only what you have selected in Powerproject
- ▶ **Pages** – Prints only the pages you specify in the available field

## Details Tab


In the **Details** gives the options for your border file and lets you limit the dates of the project you wish to print.


To choose a border file:

- ▶ Click on **Browse**



- ▶ The border files contained within the default border file will now be displayed. You can select a file from the list, or browse to another folder if you have your own border saved elsewhere.

 **Clipboard** is when the system takes a 'snap shot' of your project as if it were to print on paper. But rather than putting it on paper, it stores it in the computers memory so you can go into any other application (i.e. Word) and do Edit – Paste. It will then appear as a picture object in that application (in a read-only format)

 **Picture File** is similar to the clipboard option, but instead of storing it in the computers memory it writes it as a picture file (JPEG extension) so that you can either email it to someone or to insert it as a picture object in another application (i.e. Word)

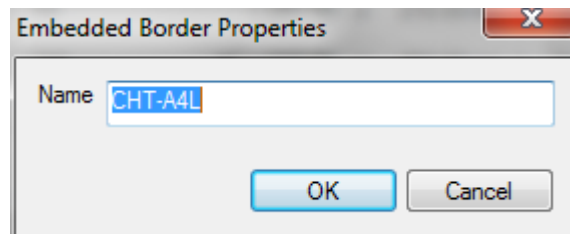
- ▶ The filenames of our border files contain a name (i.e. CHT) and page size (i.e. A3) and the orientation of the paper (i.e. L for landscape or P for portrait)
- ▶ A good default border to use would be **CHTA4L**. A thumbnail will appear on the right hand side
- ▶ Click **Open**

Borders are separate files on your computer or network and do not form part of your Powerproject file. This may mean that if you send your project elsewhere to be viewed or printed, such as via email, the border file may not be available to the recipient.

To avoid this, you are able to embed the border file which will add a compressed copy of the border file to the Powerproject file, meaning if it were to be sent the border file would be included.

To embed the border file:

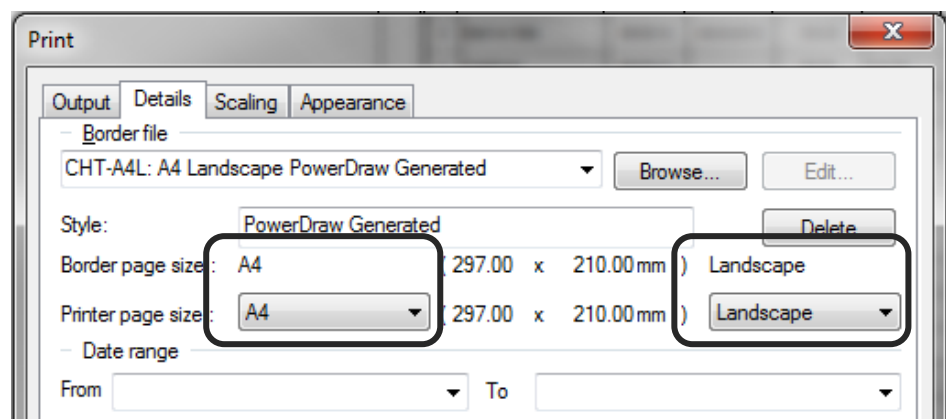
- ▶ Click on the **Embed** button



- ▶ Choose a name for your embedded border (N.B it doesn't have to be the same as the Border file).
- ▶ Click **OK**
- ▶ The Embedded border shows in the Border file list and the Embed button now displays as **Delete**
- ▶ **Delete** is active so that if you no longer need the embedded border it can be deleted from the .pp file. (N.B this does not delete the main border file)

Once a border file has been selected, you will need to make sure the chosen printer is set up to match your selected output in terms of paper size and orientation.

- ▶ Select **Printer Page size** and **Orientation** ensuring they match the border settings. The printer settings are the overriding factor.

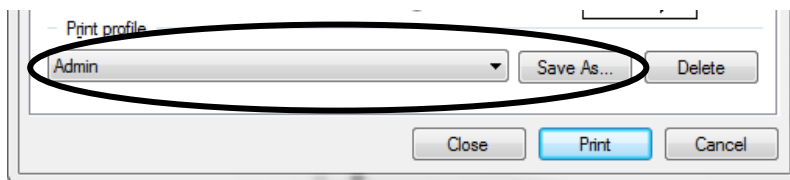


In the date range selection, you are able to select specific dates within the project that you wish to print:



- ▶ From the two drop down cells, choose a start date for the data you are printing and an end date to slice that period for printing

Once you have chosen your settings, sizes and selections in the print dialogue box you can save all these ticks and clicks as a **Print Profile**. Next time you then want to print, you go straight to the print profile and choose the profile that you want. All the selections will be remembered.



- ▶ With all selections made click on **Save As**
- ▶ Give your new profile a name, click on **OK**
- ▶ This can now be chosen each time you print

## Scaling Tab

The scaling tab is used to control the size of your print out. It can be set manually, by selecting the actual print size of a time unit (i.e. 1 Week to a centimetre) or by selecting the number of pages you would wish to have.

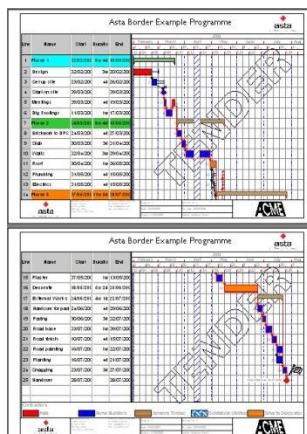
The **View Scales** options allow you to control the size manually:

- ▶ **Override horizontal (date zone) scale** – Allows you to control the scaling of the date zone (size of a week etc) Automatically set by default
- ▶ **Override vertical (Chart) scale** – Allows you to control the scaling of each bar line, Allocation and Baseline height. This is controlled by the settings in **Format Bar Chart, Vertical Scale** but does not set them in the programme.

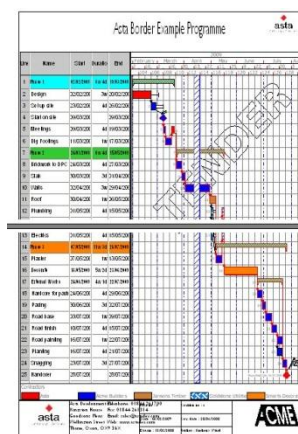
The **Scaling Type** details how the border file will be used on a multi page print out.

- ▶ **Fit border around output** – If printing to more than one page, this setting allows you to apply the border around all of the pages
- ▶ **One border per page** – If printing to more than one page, applies your chosen border to each page printed

One border per page



Fit border around output

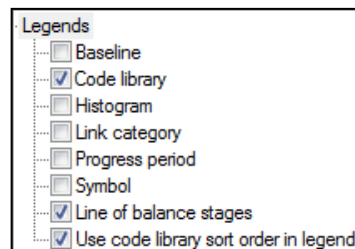


The **Horizontal & Vertical Pagination** options allow **Asta Powerproject** to adjust the size of the print out to fit to a chosen number of pages.

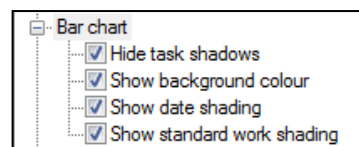
- ▶ **True size** – Prints your plan at the exact size set in the date zone or spreadsheet, so may end up printing across a number of pages.
  - **Horizontal scaling** – With true size selected this will increase or decrease your print out by the number selected e.g. 1.5 would print at 1.5 times it's normal size
  - **Expand to fill space** – Expands the chart to the edge of the border
  - **Vertical scaling** – Increases your vertical scale by the number entered. E.g. 2 would increase your vertical scale by twice the height
  - **Use Defined page breaks** – Prints a page dictated to by the position of a page break. A page break is created in the bar chart by right clicking in the bar chart where you want the page break to happen and selecting **Page Break**
- ▶ **Fit lines per page** – Gives you control of how many lines you would want printed on each page
- ▶ **Fit to at most** - Will fit it to the pages you specify 1x1, 2x2 but if you choose a size which is beyond a reasonable printout e.g. 5x5 pages for a 10 line programme it will keep it to a size which it regards as a best fit
- ▶ **Try to fit to exactly** – Will fit exactly to the pages requested whether it would look reasonable or not

## Appearance tab.

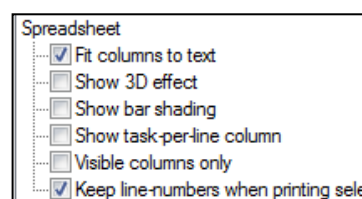
The appearance tab allows you to add or remove certain elements of the printout, such as legends, shading and hidden columns. A small selection is shown below



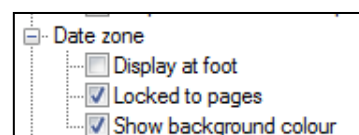
**Legends** – this shows a key at the bottom of the print out for any of the items ticked



**Bar Chart** – 'Show date shading' will either show or hide shading used on a plan

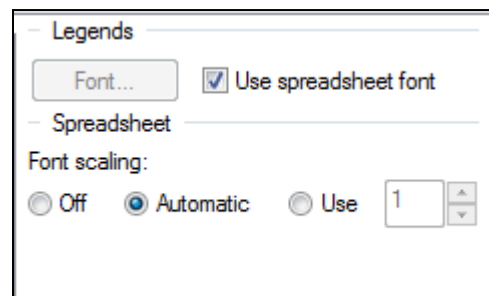


**Spreadsheet** – 'Tick Visible columns' only to only print the columns you can see on the screen



**Date zone** – 'Display at foot' will show the date zone at the bottom of the page as well as the top



**On the right of the dialogue box:**



- ▶ **Legends** – You can change the font of the legends which display at the base of the print out or just use the fonts from the spreadsheet
- ▶ **Spreadsheet** – If a font is difficult to read you can use these options to change the size of the font in the spreadsheet to make it easier to read.
  - **Off** – No scaling
  - **Automatic** – uses default scaling
  - **Use** – Increases the scale of the font by a defined amount

## Preview

We would always recommend you click the **Preview** button to check the output before printing.

- ▶ To return to the properties dialog and make any changes, click the icon  to the right of the print button.
- ▶ Finally, click the Print Button to print your project. 

## Templates

Templates are used to make creating a new project as quick as possible, as the template can contain filters, code libraries, tables and many more items that you may use.

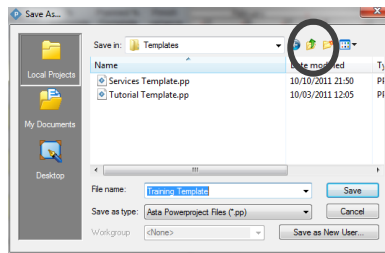
To create a template, it is best to base it on one that already exists (e.g. Construction Template) as this should already contain some items that may prove useful to you.

Once this project has opened on the screen you can now create everything you want in the template (e.g. *Filters*, *Code libraries*, etc)

You can even include titles and tasks within the Bar Chart. This could mean that for the first few lines of the project, you type in the most common titles (and include tasks as you wish) as it is quicker to delete something than to create it.

**Once everything has been created, to save this project as a template:**

- ▶ Go to the **File** menu, select **Save As**



- ▶ The Projects folder & contents are displayed. Go up a level by clicking once on the yellow folder just to the right of the folder window
- ▶ Inside this folder **double click** on **templates**
- ▶ The *templates* folder & contents will be displayed. At the bottom in the *File Name* you can rename your project template if you want to. Then click on **Save**

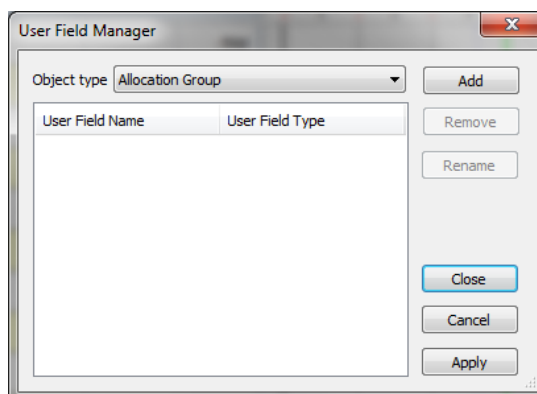
## Appendix I

### User Defined Fields

Within Asta Powerproject can add your own “user fields” to tables in the database. For example you might want to add fields to show delay notes, progress comments or if a task has been approved.

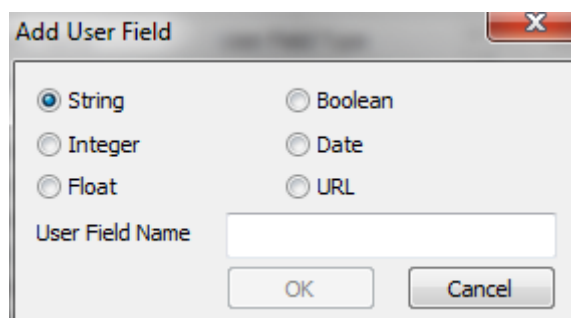
#### Creating user fields for your projects


- ▶ First **the project must be saved**. The User Field Manager will not be available if there is any unsaved information.
- ▶ Select **Project** tab and click the **User Field Manager** command.



- ▶ Click on the drop down arrow and select **Bar** from the **Object Type**, then click **Add**.
- ▶ Select the type of field that you want to create:
  - **String** – a text field, e.g. for a name or comment field.
  - **Integer** – a field for whole numbers.
  - **Float** – a field for decimal numbers.
  - **Boolean** – a True/False field, e.g. for an option that can be on or off. Boolean fields might be shown as check boxes or drop-down controls providing Yes/No or True/False options.
  - **Date** – a date/time field, e.g. to record the date or time.
  - **URL** – A hyperlink field

*The field name doesn't like spaces, and so if you want a space (e.g. QA Approved) then use an underscore (\_) between the words. When the column is added into the table, use table definition to edit out the '\_' in the title*



 When you select *Apply* or *Close*, all views in the active project are closed so that the database can be updated. Use the *View* menu to re select your chosen view

As String is selected by default, enter the name "Comments" in the **User Field Name** box.

- ▶ Click **OK**
- ▶ Click **Close**
- ▶ The user field is now available on the **properties** dialog of the particular task it is to be used on or can be created as an extra column under the Token Category of User Fields

*The following sections contain:*

*Instructions on how to use the Asta Powerproject Help system.*

*A glossary of technical terms used.*


*Example exercises*

## Appendix II

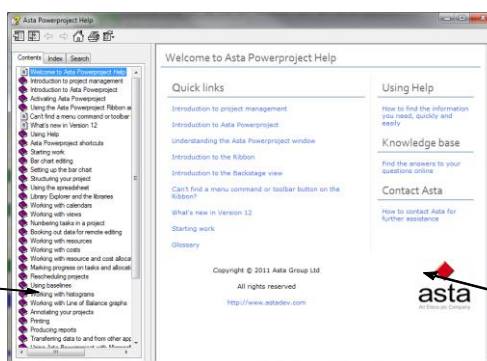
**Asta Powerproject's** online **Help** provides all the information you need to use **Asta Powerproject** to the full, presented in an easily-accessible format. The programs that are associated with **Asta Powerproject**, for example Asta Powerdraw and ServerAdmin, are also supported by comprehensive online Help. This leaflet describes how to access the online Help files and gives tips on how to use them to find the information you are looking for.

## Accessing the Online Help

### General Help

- ▶ Press F1 from any screen in Asta Powerproject.
- Or
- ▶ Click the  command on any screen.

**Navigation Pane**  
The left hand pane of the online Help window, known as the Navigation Pane is divided into a number of tabs – Contents, Index and Search – which you can use to locate the information you need

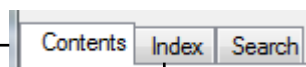


**Results Pane**  
Displays the Help Information

## Searching for Help Topics

**Asta Powerproject** provides three methods to search for help, **Contents**, **Index** and **Search**.

**Contents Tab**  
Displays all help topics in hierarchy of books & pages. Search by browsing through topics.



**Search tab**  
Keyword search returns all matches from anywhere within help contents

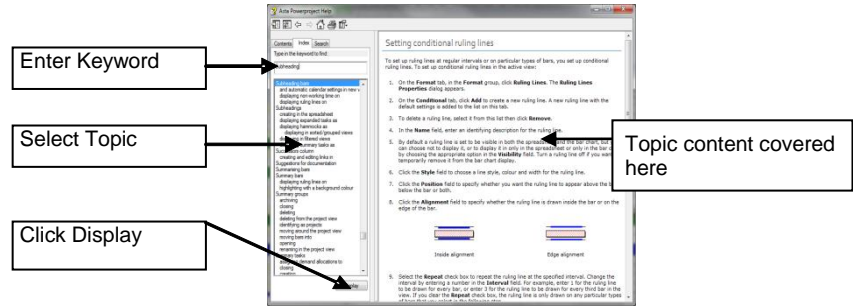
**Index tab:**  
Lists Terms & Phrases alphabetically and these are linked to topics within Help  
Search example: Entering **TA** in the search field will return results **Table**, **Tabular**, **Tagging** and **Tasks**

## Using Content

- ▶ Most useful when you know generally what to do, and you are searching for specific detail.
- ▶ Results are displayed in a logical order relating to the order you would normally use Asta Powerproject.

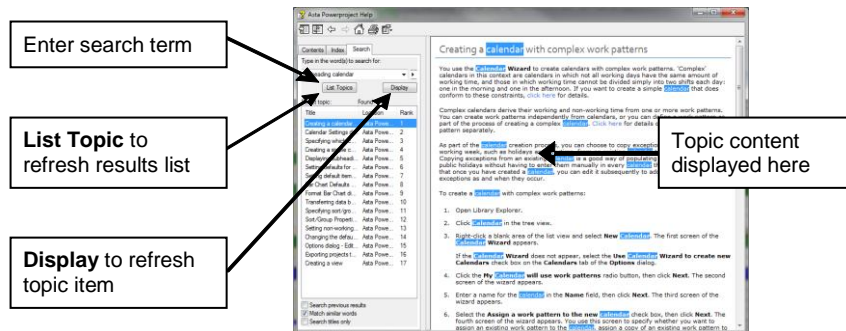
## Using Index Help

- ▶ These are the most specific of the searches.
- ▶ They are most useful when you are confident that you are using the correct terminology.
- ▶ Results are displayed as a list of headings and sub-headings.
- ▶ Each sub-heading is a topic.



## Using Search Help

- ▶ The most general of the search methods.
- ▶ Most useful when you have no idea where to start search or when exploring new areas of Asta Powerproject.



## Finding Information Using Related Topics Links

- ▶ 'Related Topics' links are a very useful way of finding out about something in more detail.
- ▶ Most topics in the online Help have a list of related topics at the end, which provide you with information that is connected to the current topic in some way.

## Frequently Asked Questions

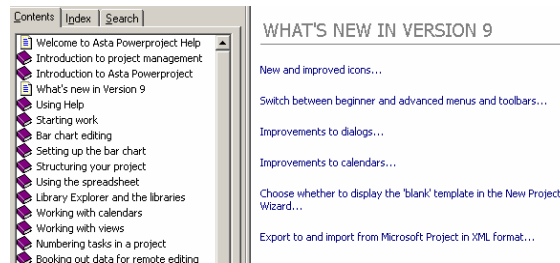
- ▶ Frequently Asked Questions (FAQ's) can be accessed from the 'Quick links' section on the Welcome screen of the help file.
- ▶ The FAQ section is divided up into subject categories.
- ▶ The categories contain the most commonly sought information within that subject.



- ▶ They can also be found on our website ([www.astadev.com](http://www.astadev.com)) under Technical Support – FAQs

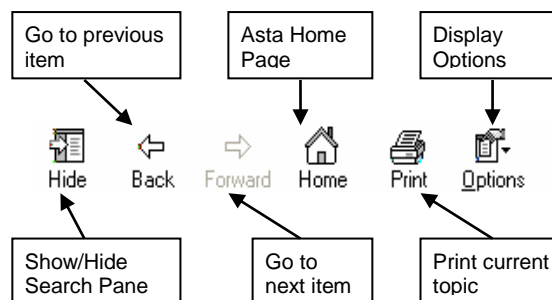
## New Features

The **What's New?** feature is available to existing users who have upgraded their Asta Powerproject program.



## Using the Navigation Bar

- ▶ The navigation bar is most useful when browsing around help.
- ▶ Back button takes you quickly to previously viewed pages
- ▶ Forward button is only active after the back button has been used.
- ▶ Asta Development PLC Home page is [www.astadev.com](http://www.astadev.com)



## Printing Help Topics

Your print options will depend on the version of Microsoft Internet Explorer you have installed, and the printers that are available to you.

- ▶ Display the topic you want to print in the Topic pane.
- ▶ Click Print in the Help toolbar.
- ▶ You may see a dialog offering you the option to print the selected topic, or the selected topic and all its subtopics. Choose to print the selected topic only.
- ▶ Complete the Print Dialogue box.

## Getting More Information

You can find more information on how to use Asta Powerproject Help within the Help itself. For example, you can find detailed information on how to navigate around topics, how to set options that change the way the Help is displayed and how to use advanced searching techniques to find the information you need. For more information on getting help, refer to the 'Using Help' topic in the online

## Help Glossary

### **Allocation –**

This is the name given to any item, for example Permanent or Consumable resources that can be assigned to a task from a library. The allocation can be displayed on the Bar Chart underneath the task.

### **Bar –**

Horizontal area on the spread sheet and Bar Chart containing information about a task.

### **Bar Chart –**

The area of the screen where tasks can be viewed graphically.

### **Baseline –**

A complete copy of the project recorded at a stage in time. Asta Powerproject can record and display multiple baselines allowing for: tracking of major changes; production of what-if scenarios; comparison of information (e.g. budget cost to actual cost)

### **Border File –**

A print function which contains information to be included in you printouts, including graphics such as company logo, project information such as the project title and relevant dates.

### **Buffer –**

A Task that is used to collect float and protect the Critical Path through the project. It achieves this by having its duration dynamic which increases or decreases in response to project changes.

### **Code (Colour) –**

A facility to allow the assignment of colours to tasks to represent information about the task.

### **Code Library –**

This is the library (or folder) that contains Codes, allowing you to have multiple 'categories' of codes

### **Constraint (Flags) –**

These are used to enforce dates when a Task can happen (stopping a task starting before a certain date, or stopping a task finishing after a certain date). Using Constraint Flags within the project can have a major affect on your Critical Path

### **Consumable Resource –**

This is a resource that if it is used today, it is not there tomorrow (e.g. bricks, mortar, and piping)

### **Control Key (CTRL) –**

A key on the key board normally found at the bottom left (and one on the right) used throughout windows applications for either commands (e.g. CTRL + S for saving) or for selective highlighting. (To highlight everything that is clicked upon whilst the key is held down)

### **Cost Centre –**

These are items that are used to assign costs to Tasks in the project (either directly – fix cost, or indirectly – via Cost and Income Rates). Either one can be used through the project, or multiple ones to show different categories of costs incurred (e.g. Labour, materials, plant)

They can also be used for money coming in to the project (Income) rather than money leaving the project.

### **Cost and Income Rates –**

These are items that can be assigned to Permanent Resources to show how much they cost per 'time unit'. It could be a daily cost or even an hourly rate. These act as the 'middle man' between Cost Centres and Permanent Resources allowing Cost Centres to be used indirectly.

### **Critical Path –**

This is shown as a red outline on Task and all Links showing red, the critical path means that this is the most important route through the project. If any of the items on the critical path are changed in anyway (durations or positions of) then the end date of the project will change, becoming earlier, or later

### **Date Zero –**

Normally at the start of the project, but can be moved without affecting the project. Date Zero is the point where week -1 meets week 1 (so allowing you to make your project 'start' in week -10)

## **Date Zone –**

This is the area above your project that contains rulers of information (e.g. week numbers, week start).

## **Exceptions –**

These are time periods that are different to the usual work week. E.g. Holidays, overtime etc.

## **Expanded –**

This type of task is very similar with Summary tasks, in that it is used to group together Tasks within the project, but rather than have them on screen with itself like the Summary task, the content is actually held off chart in its own chart (or Sub Chart as it is commonly known)

## **Filter –**

This is a tool that will leave on screen only those items that meet a particular criteria, for example all the items that a particular contractor is doing (Code based filtering) or you want to see everything but only during a 6 week period (time based filtering) even to show only those items that have been completed (Progress based filtering)

## **Float –**

This appears on items that are not on the Critical Path. Float is the amount of time a Task may be delayed or extended before the item rejoins the critical path and pushes out the end date of the project. See Total Float and Free Float for more information

## **Free Float –**

This is one of the two types of Float; Free float means that if the task is extended or delayed in anyway during its period of float only this item is affected, nothing else will move.

## **Lag (Links) –**

Waiting time that is shown as the horizontal part on a Link (e.g. Concrete curing time, paint drying time or just delivery times).

## **Library Explorer –**

This is another main area of the software, It is inside of here that certain items are created (Cost Centres, Calendars, Codes, Permanent Resources to name but a few) But also certain settings can be changes in here as well ( the exception colours, link colours, working in pounds or Euros)

## **Link –**

This is an arrow going between two items, representing the logical path through the project. Where one Task can start before another one. If shown in red then the link is Critical.

## **Macro –**

A macro is a piece of code (software) that has been written to remove long, repetitive or complicated procedures by the user.

## **Mid-link –**

The software supports 4 major types of Links and a mid-link is one of those four with some setting to it so it allows it to be drawn almost anywhere along the task rather than from (or to) the start or end of the Task

## **Milestones –**

Milestones are points in time; they have no duration of their own (0 days) and are used to represent key events within projects. (E.g. Handover)

## **Overlapping Links –**

See Mid-Link

## **Permanent Resource –**

This is a resource that if it is used today, it is there tomorrow (e.g. man power, machinery)

## **Progress (Period) –**

Progress is the method used to mark up the project so it is easy to know whether the project is in front or behind. A progress period is the reporting date, shown as a line going down the screen, and it will bend to the left to show items behind time and bend to the right to show items ahead of time.

## **Project View –**

This white window that opens on the left hand side of the screen is used to navigate around the project, or to assign items into the project like Code Libraries, Cost Centres, Permanent Resources, Consumable Resources and Calendars.

## **Shift Key (or a bold arrow pointing up) -**

A key on either side of the keyboard, used for creating capital letters, to pick up any of the top row of symbols on the numerical keys and others. Also used to highlight a range of items, (left click on one item, then hold down shift and select another item. Everything in between becomes highlighted.) Also used for creating Lag links.

## **Snapping Unit Box –**

This is the window on the toolbar at the top of the screen, normally with the word days written in it. This window controls many areas of the software. It is mainly used to control the units Tasks are drawn in when the mouse is dragged across the Bar Chart. But it is also the default duration of Tasks when typing in the Spreadsheet, so if a duration was entered without the time unit after it (1 instead of 1d) then the resulting Task would be in the duration defined by the Snapping Unit Box

## **Sort –**

Unlike a filter that temporarily removes items off the screen, a sort will leave all Tasks on screen, but will reorder them according to criteria that have been set. For example, rather than the program showing the Tasks in time order (earliest task first as most programs are created) the project could be told to group together all the Tasks according to the Code that has been assigned to it

## **Spreadsheet –**

This is the yellow and white striped table down the left hand side of the screen (assuming the Project View is closed) the Spreadsheet is made up of different columns and these columns can be removed, added or even moved around. The software supports a large number of these columns

## **Summary –**

This is an item that groups together Tasks on screen under its own task. Items are grouped because they share certain information, for example, summaries could be used to group together all the Tasks on different floors. A Summary could also be used to show different phases or even stages within a project. Summaries can be placed inside of each other allowing a project structure or hierarchy to be created (Three different buildings, broken up into 4 different floors – so 3 main summaries each containing 4 more summaries inside of them)

## **Task –**

The activities or 'blocks' that appear within a Bar on the Bar Chart.

## **Template –**

A template is a file that is used when creating a project from new. This particular file will already contain items needed in the project. So a template could already have Calendars, Permanent Resources, Cost Centres, Code Libraries it could even have titles in the Spreadsheet and Tasks in the Bar Chart.

## **Total Float –**

This is one of the two types of Float. Total float means that if the task is extended or delayed in anyway during its period of float, then all items directly after it (those containing Float) will also be affected as well.

## **UDF –**

User Defined Fields – the software already has a large range of columns that can be used in the Spreadsheet but every column has a use. UDF's are columns created by the user for whatever purpose, whether it is for recording delivery notes, delay notes or even to have a tick box to say whether or not a health and safety check has been done.

## **View –**

A view is the method used for the software to remember screen settings. When saved the 'view' will remember if the Project View is opened or closed, it will remember the current column configuration within the Spreadsheet. It will also remember the current settings of the Bar Chart, also the Date Zone and finally whether there are any Filters or Sorts running within the program. Putting all of this together a view is the ability to change all of these settings to a predefined set by only doing one click of the mouse. The software can have unlimited number of views saved.

## Exercises

### Exercise 1 Shed Build

You have decided that you need to buy and erect a new shed for your back garden.

You know what tasks are involved and how long each task will take you.

- The project will start *next* Monday
- You will use the *Construction Template*,
- Also you have given yourself a maximum of 7 weeks to complete the project, so it is likely that certain activities will have to be worked on at the same time.
- The sixth weekend of the project will be available to work, so this period should be added to your calendar as Weekend Working (Morning and Afternoon).
- The first Friday you are going to take one day's holiday, again add this to your calendar.

The title of the project will be *Shed Build*.

|                 |  |
|-----------------|--|
| Market Research | 2 weeks                                    |
| Buy Shed        | Milestone                                  |
| Delivery Period | 10 days                                    |
| Dig Base        | 6 days                                     |
| Pour Concrete   | 2 days with a 1-day lag for curing         |
| Erect Sides     | 1 week                                     |
| Paint (2 tasks) | 2 days for undercoat<br>2 days for topcoat |
| Roof            | 3 days                                     |
| Window          | 1d   |
| Door            | ½ day                                      |
| Lock            | ½ day                                      |
| Final Checks    | 1 day                                      |
| Complete        | Milestone                                  |

Create a fully linked bar chart. Each task must be linked and a reschedule is required to show the critical path.

What is the end date of your project?

## Exercise Two

Open the Shed Build Project

You are going to create a new project hierarchy.

All current tasks will be put into the following summary tasks:

- ▶ Phase 1 – Market Research, Buy Shed, Delivery Period, Dig Base
- ▶ Phase 2 – Pour Concrete, Erect Sides, Paint, Roof
- ▶ Phase 3 – All remaining tasks.

## Exercise Three

Open the Shed Build project.

You have decided that rather than carry out the work yourself you are going to use local subcontractors. You will use a colour coding system to denote on each task which subcontractor is going to carry out the work

Create a code library called *Subcontractors* with the following contractors as colour codes within.

- ▶ Sheds R Us Ltd
- ▶ Marley Ltd
- ▶ Tristar PLC.

Allocate the codes to the tasks of your choice

## Exercise Four - Construction Project

- Start a new project using the **construction template**
- The **File Location** of your new project will be CONSTRUCTION
- The start date will be next Monday.
- Editing your default calendar

Add the following exceptions to your default calendar: (5 day week, Xmas and Easter only)

You will work overtime on the first 2 Saturdays of the project from 08:00 – 12:00.

You will be taking a day's holiday on the 3<sup>rd</sup> Friday of the project.

### Creating the Project

Create the following tasks:

|                         |           |
|-------------------------|-----------|
| Procurement sheet piles | 15d       |
| Breakout concrete slab  | 3d        |
| Piling platform         | 2d        |
| Sheet piling            | 4d        |
| Base Reinforcement      | 5d        |
| Base Concrete           | 1d        |
| Roof Slab Falsework     | 4d        |
| Roof Slab Reinforcement | 4d        |
| Roof Slab Concrete      | 1d        |
| Covers                  | 1d        |
| Complete                | Milestone |

Create a fully linked bar chart and then reschedule to show the critical path.

Summarise the project by creating 3 summary tasks:

**Construction** to include Procurement Sheet Piles to Sheet Piling

**Main Base** to include Base Reinforcement to the Base Concrete

**Roof Slab** to include Roof Slab Falsework to Covers

### Code Libraries

You will use local subcontractors to do some of the work. Create a code library called SUB CONTRACTORS.

Choose the name of 3 contractors and add them to the code library. Select an appearance for each.

Allocate these to tasks in your project.



## Exercise Five

Open Shed Build project

You are now 1 week into the project and would like to monitor the progress of the work carried out to date.

- ▶ Go to View, Table, Progress and select **Progress - No Baseline**

Marking Progress:

- ▶ Change the default progress period to 1 week into the programme
- ▶ Make **Market Research** 20% complete

Reschedule the project to straighten to the default progress period and note the new end date of your project

The logo for Asta Powerproject, featuring the word 'asta' in a dark grey box followed by 'powerproject' in a white box.

**£50 DISCOUNT VOUCHER**

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This voucher is not to be used in conjunction with any other offer and the discount only applies to the current list price of our courses.

**Valid for 3 months from the date of your course**

The Asta logo, consisting of a red diamond shape above the word 'asta' in a bold, sans-serif font. Below 'asta' is the text 'An Eleco plc Company' in a smaller font.

asta  
An Eleco plc Company