CREATE AND UPDATE AN UNRESOURCED PROJECT USING

ELECOSOFT (ASTA) POWERPROJECT
VERSION 16

BY

PAUL EASTWOOD HARRIS

2-day training course

handout and student workshops

ELECOSOFT (ASTA) POWERPROJECT VERSION 16 WORKSHOPS

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ASTA NAME CHANGE

Asta plc was purchased by Elecosoft plc and the term Asta has been dropped in all text published by Elecosoft plc in Powerproject Version 15. Many people and most overseas authorised distributor websites at the time of publishing this book refer to Powerproject as "Asta" so as a result I have named this book with the term "Asta".

DISCLAIMER

The information contained in this book is, to the best of the author's knowledge, true and correct. The author has made every effort to ensure accuracy of this publication but cannot be held responsible for any loss or damage arising from any information in this book.

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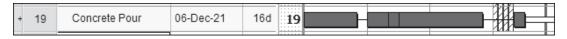
Workshop 8 - Other task Types

You will go through the process of creating the following in your schedule:

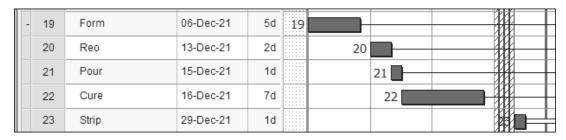
- Task-per-line mode
- Expanded Tasks
- Hammock Tasks
- Task Names as Headers Only

Task-per-line mode

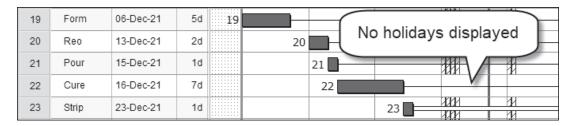
- 1. Select the second blank line after your last task.
- 2. Draw 5 tasks on your Gantt chart which have the duration of 5, 2, 1, 7 and 1 day long on one line,
- 3. Enter a Name of Concrete Pour:



4. Click on the + sign to the left of the Line No and type in the new task names:



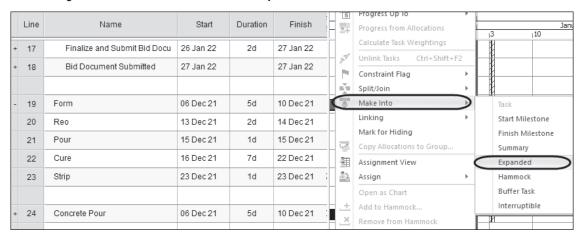
- 5. Assign a 7 day per week calendar to the Cure task, accept the default and DO NOT change the Folding Calendar.
- 6. You will see the schedule shortens and there are no holidays shown for the Cure task because Powerproject displays the Non Work time against each task:



Note: There are no links and they have an inherited Finish to Start link.

Expanded Tasks

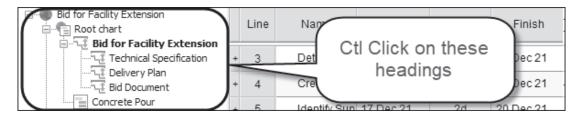
- Add a new task named Concrete Pour in the second blank line below your last task with a duration of 5 days,
- 2. Right click and select Make Into and Expanded task:



- 3. Double click on the Expanded task bar to open a new window,
- 4. Add the same five tasks, link them and assign the 7 day per week to the Cure task, do not change the Folding Calendar.

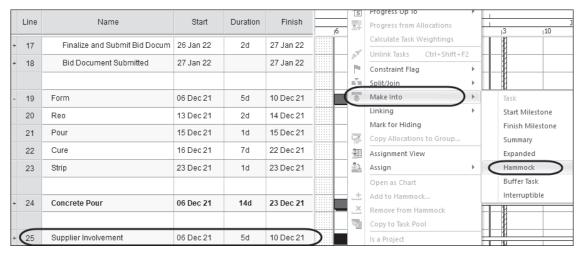


- 5. Open the **Project View** and expand the heading **Root Chart**.
- 6. Click on the all the headings individually from OzBuild to Concrete Pour and you will see how the **Root Chart** works and how **Expanded Task** operate.
- 7. Select **Root Chart** and **Concrete Pour** in the Project View and see that the Expanded Concrete Pour activities are below the Expanded task.
- 8. Select **Bid for Facility Extension** and **Concrete Pour** in the Project View and see that the Expanded Concrete Pour activities are at the bottom of the list of tasks:

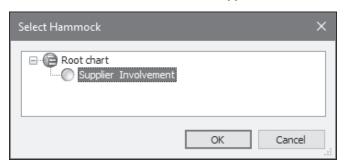


Hammock Tasks

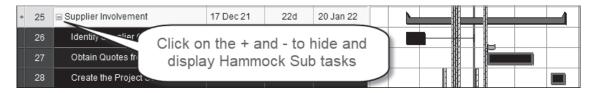
- 1. Select the **Root Chart** heading,
- 2. Add a task in the second blank line below your last task named **Supplier Involvement** and assign a duration of 5d,
- 3. Right click on the bar and select **Make Into**, **Hammock**:



- 4. Note the change in shape of the Hammock bar,
- 5. Select the following task bars in the Gantt Chart:
 - Identify Supplier Components
 - Obtain Quotes from Suppliers
 - Create the Project Schedule.
- 6. Right click and select **Add to Hammock**, select the **Supplier Involvement** task and select OK:

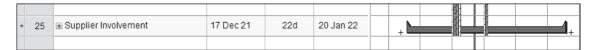


7. Your schedule should look like this:



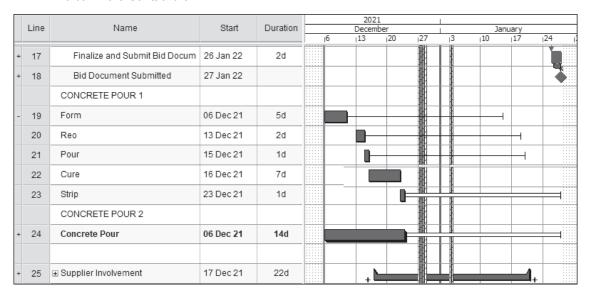
8. The tasks that are part of the Hammock may be seen twice, once in the schedule and once under the Hammock.

9. Click on the sign to the left of the Hammock name to hide or display the Hammock sub tasks:



Task Names as Headers Only

- 10. When a blank line is created and only a Name is entered and no duration then this becomes a heading only.
- 11. The picture below shows two headings titled Concrete Pour 1 and Concrete Pour 2, and they have no bar in the Gantt chart:



- 12. Now delete all the tasks you have created in this workshop:
 - Task-per-line mode,
 - Expanded Tasks,
 - Hammock Tasks, ensure you do not select the Hammock sub tasks.

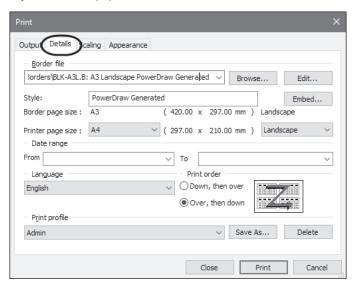
Workshop 13 – Printing

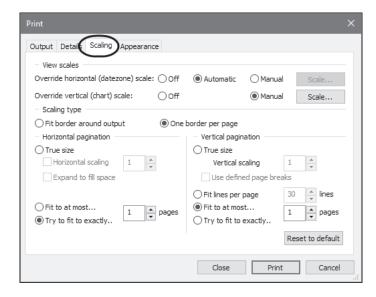
Background

We want to issue a report for comment by management.

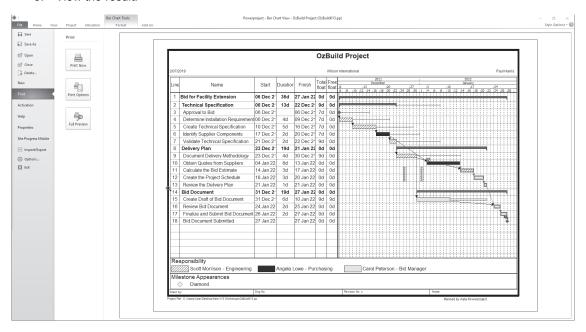
Assignment

- 1. Apply the **Bar Chart View**, and remove any additional columns you have added so there are only the Line, Name, Start, Duration, Finish Total Float and Free Float columns displayed.
- 2. Select File, Print, Options.
- 3. Select A3 Landscape, or paper size that your country usually uses,
- 4. Select the Boarder file **CHT-A3L.B: A3 Landscape PowerDraw Generated** if available, or a boarder to suit your selected paper size:





5. View the result:



Course Agenda and PowerPoint Slides

Day 1 - Create an Unresourced Project

- 1. Introduction to Asta Powerproject and Creating a Project
- 2. Navigation and Setting Options
- 3. Calendars
- 4. Tasks and Milestones
- 5. Summary Tasks
- 6. Linking Tasks to create a Critical Path Schedule and Reschedule
- 7. Constraints
- 8. Other Task Types

Day 2 – Formatting, Reports and Updating an Unresourced Project

- 9. Formatting the Display
- 10. Code Libraries
- 11. Filters
- 12. Organising Tasks using Group and Sorts
- 13. Printing and Reports
- 14. Baselines
- 15. Updating an Unresourced Project
- 16. Library Explorer
- 17. User Definable Fields and WBS.



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CREATE AND UPDATE
AN UNRESOURCED
PROJECT USING ELECOSOFT
(ASTA) POWERPROJECT

VERSION 16







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EASTWOOD HARRIS PTY LTD.

Welcome to the Create and Update an Unresourced Project

using
Elecosoft (Asta) Powerproject
Version 16

training course



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Administration

- Evacuation and First Aid,
- Facilities, timings and meals,
- Mobile phones & emails,
- Introductions:
 - Your name,
 - The types of projects you are involved in,
 - Your experience in scheduling software, and
 - What you intend to do with the software after the course,
- Course attendance sheet.



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Required background to attend this course

To attend this course you are expected to:

- Understand how projects are managed and the project management process required to run projects,
- Understand how to use PCs and the operating system,
- A basic understanding of Critical Path concepts, including how the forward and backward pass calculate Early Dates, Late Dates, the Critical Path and Float,
- Experience in using project planning and scheduling software such as Microsoft Project or Primavera P6, etc. would be beneficial but not essential.

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Background Reading

There are many books on the market that give guidance on the creation and updating of project schedules:

- PMBOK® Guide
- PRINCE2
- AACE International publications,
 - Total Cost Management and
 - The Recommended Practices, relevant ones are listed on the next slide



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| ID | TITLE | |
|--------|--|----|
| 14R-90 | Responsibility and Required Skills for a Project Planning and Scheduling Professional | |
| 20R-98 | Project Code of Accounts | 10 |
| 21R-98 | Project Code of Accounts – As Applied in Engineering, Procurement, and Construction for the Process Industries | 1 |
| 23R-02 | Identification of Activities | |
| 24R-03 | Developing Activity Logic | |
| 27R-03 | Schedule Classification System | |
| 32R-04 | Determining Activity Durations | |
| 37R-06 | Schedule Levels of Detail—As Applied in Engineering, Procurement, and Construction | |
| 38R-06 | Documenting the Schedule Basis | D |
| 39R-06 | Project Planning – As Applied in Engineering and Construction for Capital Projects | 1 |
| 45R-08 | Scheduling Claims Protection Methods | / |
| 48R-06 | Schedule Constructability Review | 0 |
| 49R-06 | Identifying the Critical Path | |
| 52R-06 | Prospective Time Impact Analysis – As Applied in Construction | |
| 61R-10 | Schedule Design – As Applied in Engineering, Procurement, and Construction | 1 |
| 70R-12 | Principles of Schedule Contingency Management – As Applied in Engineering, Procurement and Construction | |
| 78R-13 | Original Baseline Schedule Review - As Applied in Engineering, Procurement, and Construction | |
| 82R-13 | Earned Value Management (EVM) Overview and Recommended Practices Consistent with EIA-748-C | |
| 84R-13 | Planning and Accounting for Adverse Weather | |
| 89R-16 | Management Summary Schedule | 39 |
| 91R-16 | Schedule Development | |
| 92R-17 | Analyzing Near-Critical Paths | 1 |
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Course Objectives

This objectives of this course are to teach participants:

- The user interface,
- How to create a project,
- Scheduling projects without resources,
- Filters, Views, Sorts and Printing,
- Creating and assigning a baseline and
- Updating an un-resourced project,

Successful completion of all the course workshops will confirm that the objectives have been met,

Note: Powerproject has a large amount of functionality and this course does not cover all aspects of the software. Please refer to the help files for a more detailed understanding of the functions not covered.

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Course Conduct

- This course is instructor lead,
- The instructor will demonstrate the software with a combination of PowerPoint presentations and live software demonstrations,
- Most topics are reinforced by workshops,
- The manual is yours to take away,
- Take any notes,
- Ask any questions.



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Course Agenda

Day 1 - Create an Unresourced Project

- 1. Introduction to Powerproject and Creating a project
- 2. Navigation and Setting Options
- 3. Calendars
- 4. Tasks and Milestones
- 5. Summary Tasks
- 6. Linking Tasks to create a Critical Path Schedule
- 7. Constraints.



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Course Agenda

Day 2 – Formatting, Reports and Updating an Unresourced Project

- 8. Other Task Types
- 9. Formatting the Display
- 10. Code Libraries
- 11. Filters
- 12. Organising Tasks using Sort and Groups
- 13. Printing and Reports
- 14. Baselines
- 15. Updating an Unresourced Project
- 16. User Definable Fields and WBS.

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Selecting the currency

- Powerproject templates loaded with the software are often configured with UK Pounds as the currency,
- To change the currency to a different currency:
 - Open the project that you will be working with,
 - Display the Currencies in the Library Explorer,
 - If the currency you require does not exist then add the currency you require or rename an existing currency,
 - Assign your Currency to your project, and
 - Save your new project as a template, so when you create a new project it will have the correct Currency,
- **Note:** One currency is the Base currency and may not be deleted. It has a icon and is used to calculate the rates of all other currencies. This and one other system currency may not be deleted, but they may be renamed.

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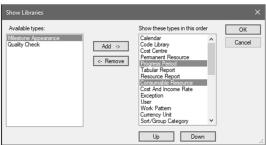
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Showing the currency in the Library Explorer

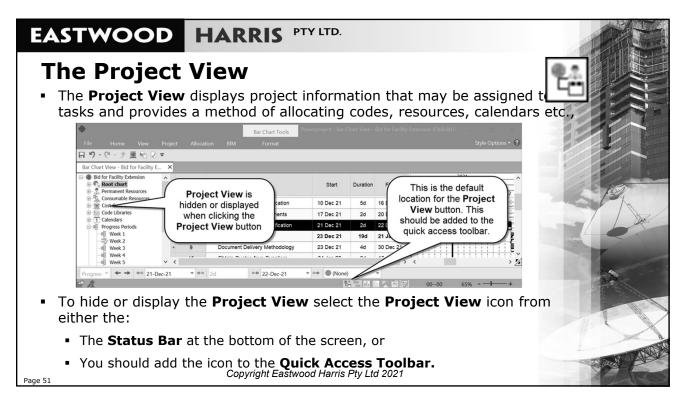
- Select View, Library Explorer, to open the Library Explorer in a new window,
- Right click in the bottom left hand window and select Show Libraries...,



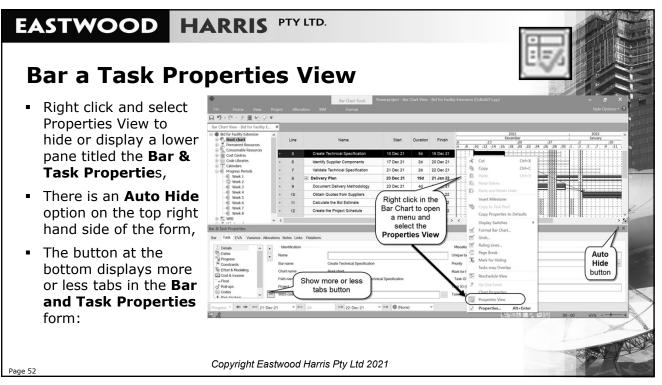
- Add the Currency Unit,
- The Library Explorer is covered in more detail later.

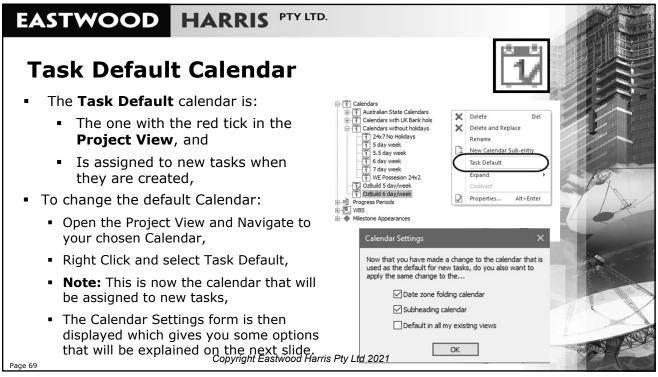
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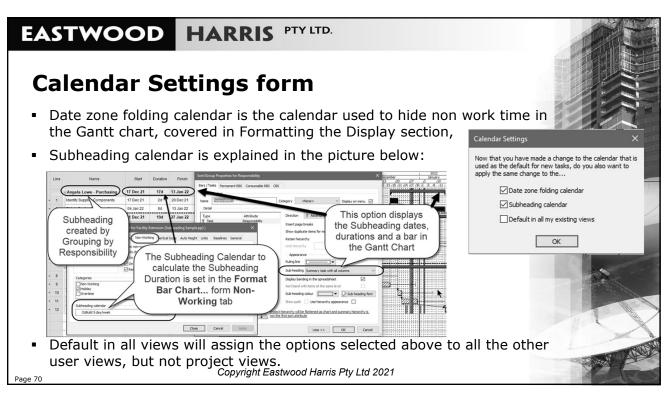


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Understanding Milestones

- There are 2 types of Powerproject milestones, Start and Finish,
- Powerproject milestones calculate in a similar way to P6 milestones but display both Start and Finish Dates. Microsoft Project Milestones always calculate as a Powerproject Finish Milestone:
 - A Start Milestone will appear at the start of the next available work period, usually at the same time as the successor,

Finish Milestone

Start Milestone

- A Finish Milestone will appear at the end of the current work period, usually at the same time as the predecessor,
- E.g. if a predecessor task is completed on Friday afternoon,
 - A successor Finish Milestone will appear at the end of Friday afternoon,
 - A successor Start Milestone will appear on Monday morning,

A Start Milestone is created by default.

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Creating a Start Milestone

- To create a Start Milestone either,
 - Type in the Milestone name in a blank line and
 - Enter 0 in the duration column,

| | Line | Name | Duration | Start | Start Finish T | | Free float | | | mber 13 2 |
|----|------|-------------------------------------|----------|-----------|----------------|----|---------------|-----|-------------|--------------------|
| -(| 1 | Approval to Bid | | 06 Dec 21 | 06 Dec 21 | 8d | 8d | 1 (| > | \ni |
| + | 2 | Determine Installation Requirements | 4d | 06 Dec 21 | 09 Dec 21 | 4d | 4d | 2 | | H |
| + | 3 | Create Technical Specification | 5d | 06 Dec 21 | 10 Dec 21 | 3d | 3d | 3 | | \vdash |

- Or, go to the first blank line at the bottom of the screen in the Gantt Chart,
 - Right click and select Insert Milestone and
 - Type in the Milestone name:
- **Note:** The 0 Duration may not be displayed when the default is to display zeros as blank in the Table Definition Properties form.

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Creating Links



There are many ways to create links:

- Drawing with the mouse, which is the most natural method and may be used to assign Leads and Lags,
- Select the tasks and use the Block Linking function,
- Note: Block Linking only links from top to bottom and not in the order that tasks are selected like Primavera P6 and Microsoft Project,
- Using the Link From/To form, which may be opened in a number of ways including:
 - Bar and Task Properties form or view,
 - From a Predecessor or Successor column,
 - Then the Line Numbers may be typed in or
 - The Link From/To form opened,

Gant chart menu.

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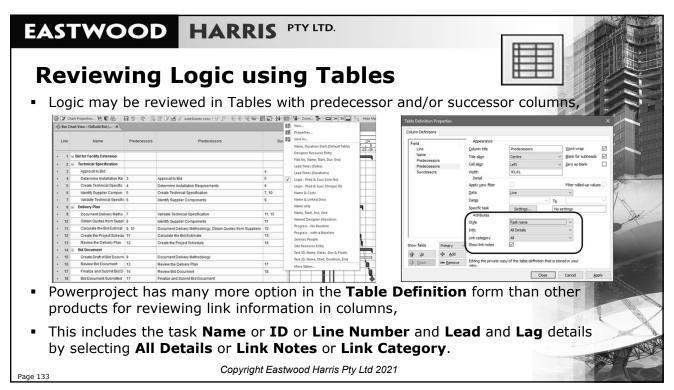
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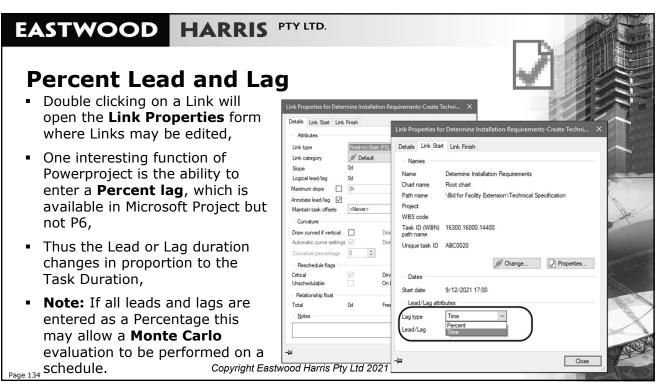
PTY LTD. Drawing Links... Links are drawn between tasks using the following cursor shapes: End link Linking from the end of a task Start Link Linking from the start of a task Mid Link Linking from the middle of a task Note: The No Entry sign indicates that the mouse in not in a position to create a link and releasing the mouse will open the Link From/To form.

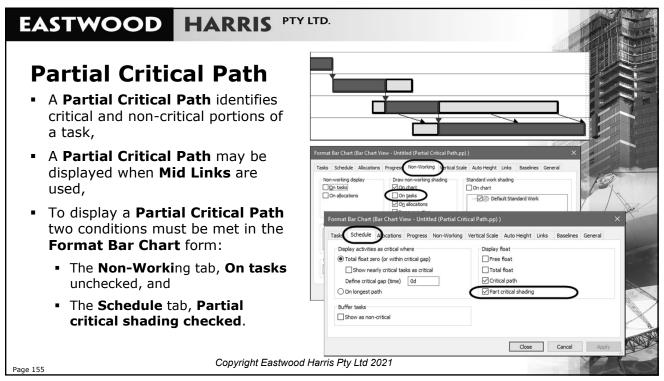
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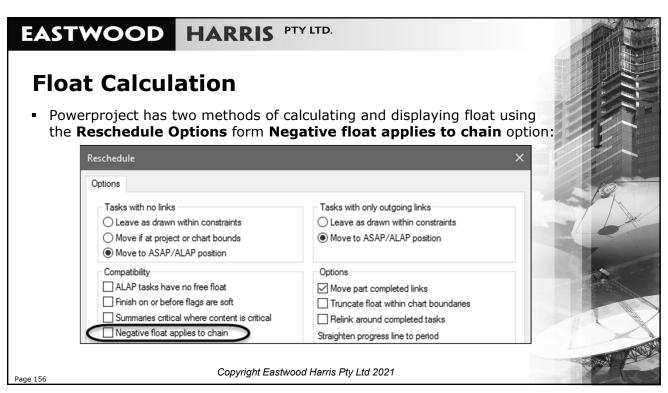


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EASTWOOD HARRIS PTY LTD. **Float Calculation** Negative float applies to chain option unchecked: Only the first task in a chain causing negative float is displayed with Negative Float and it also displays a Negative Float bar: 8d 11-Jan-22 -2d 0d Negative float applies to chain option checked: All tasks in the chain calculate Negative Float but NO Negative Float bar is displayed against any task, • This is how P6 and Microsoft Project calculate, but they will both display a Negative Float bar, Powerproject does 1 🖃 Delivery Plan 2 Obtain Quotes from Suppliers 04-Jan-22 8d 13-Jan-22 NOT display a **Negative** Calculate the Bid Estimate 14-Jan-22 3d 17-Jan-22 -2d Float bar with this Review the Delivery Plan 21-Jan-22 1d 21-Jan-22 option.

24-Jan-22

4d 27-Jan-22 -2d 0d 2d 31-Jan-22

Review Bid Document

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EASTWOOD HARRIS PTY LTD. 7 - CONSTRAINTS SUMMARY In this module we looked at How to add and remove constraints, Snapping Start on a New Day Partial Critical Path Float display and Negative float applies to chain.

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Workshop 7 - Constraints

- Management has provided further input to your schedule,
- You will need to set some constraints and eliminate Negative Float.



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8 - OTHER TASK TYPES

This module will cover the following topics:

- Task-per-line mode
- Expanded Tasks
- Hammock Tasks
- Subheadings and
- Buffer Tasks.



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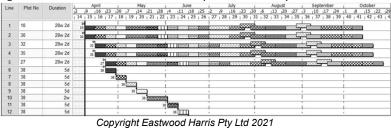
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Task-per-line mode

- Powerproject may display multiple tasks on line in the Gantt Chart,
- Powerproject terms this Multiple Tasks on a Bar,
- This is useful when it is desirable to reduce the number of lines in a program and when it would be logical to display them all on the same line,
- Powerproject may also display these tasks on separate lines if required,
- The picture below is an example of a housing project with each line representing a house with each trade represented by the tasks:



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Understanding Bars and Tasks

- When you create multiple tasks on one line the two terms you need to understand are Bar and Task,
- A Bar contains one or more Tasks:
 - **The Bar Name** is displayed in the **Name** column when the Tasks are rolled up,



- Tasks may be drawn on the Gantt Chart:
 - There may be multiple
 Tasks to a Bar,
 - The Task Name is displayed in the Name multiple Tasks is expanded.

| Line | Name | Bar name | Task name | Dur | 1 ⁴ | 111 | June 18 2 | |
|------|-------|---------------|-----------|-----|----------------|-----|-------------------|-----|
| 1 | Form | Concrete Pour | Form | 5d | 1 | | | |
| 2 | Pour | Concrete Pour | Pour | 1d | | 2 | | |
| 3 | Reo | Concrete Pour | Reo | 5d | | 3 | | |
| 4 | Strip | Concrete Pour | Strip | 1d | | | 4 | -29 |

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Adding Task-per-line

You may create multiple tasks on one line by dragging in the Gantt Chart and then enter the **Bar** name in the **Name** column:



 Click the "+" button to the left of the line number within the table and enter each Task name in the Name column,

| | Line | Name | 17 116 | | uary 121 118 I | ₁ 21 ₁ 28 | | - | _l 1 | Feb 1 |
|---|------|-------|-----------|--|----------------------|---------------------------------|----|---|----------------|----------|
| - | 1 | Form | | | | | | | | |
| | 2 | Reo | | | | | - | | | |
| | 3 | Pour | | | | | -! | | | |
| | 4 | Cure | | | | | | | | |
| | 5 | Strip | | | | | i | | | |

Click the "-" button to return the tasks to one line mode.

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Understand the Difference Between Bars and Task When there are multiple Tasks-per-line: The Bar description is seen in the Name column when the tasks ARE on one line,

The Task description is seen in the Name column when the tasks ARE

The **Bar** description is Concrete Slab,

NOT on one line,

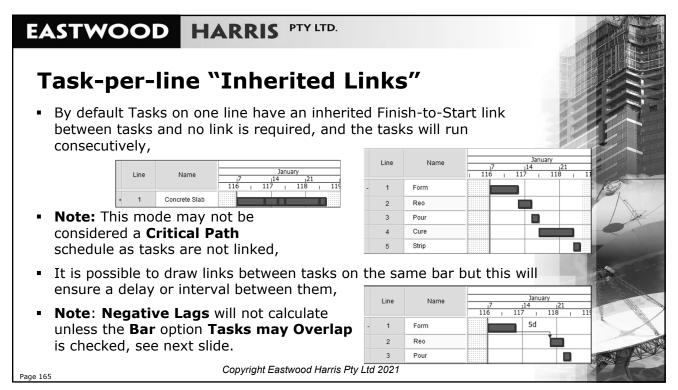
 The **Tasks** are Form, Reo, Pour etc.:



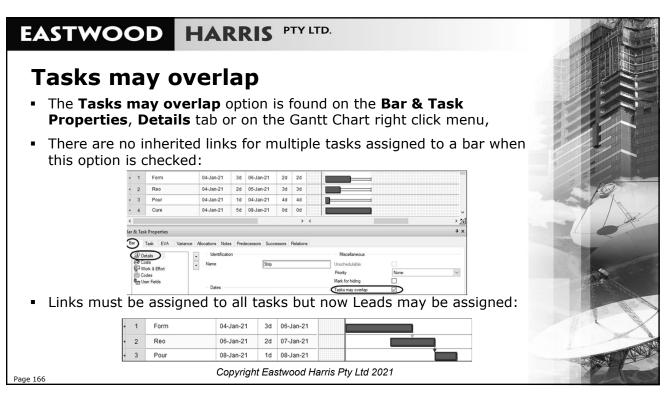
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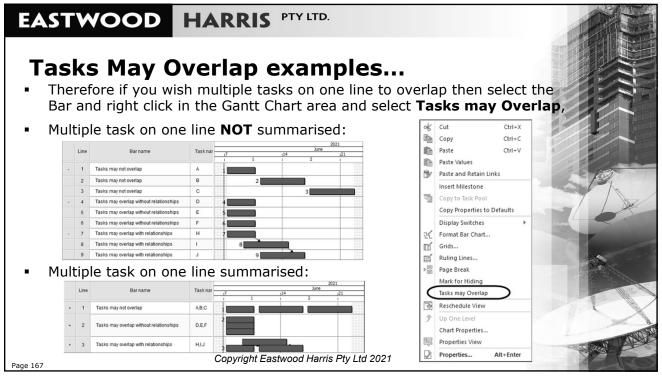
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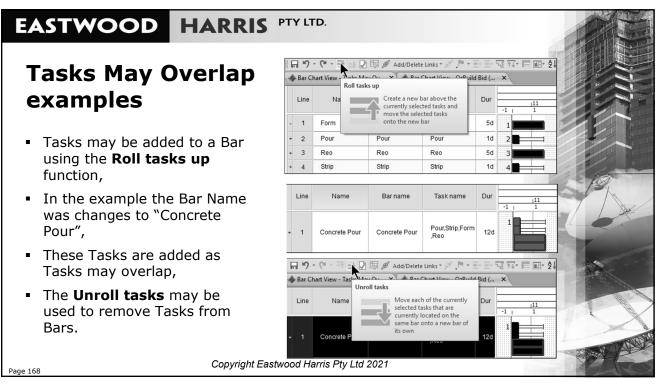


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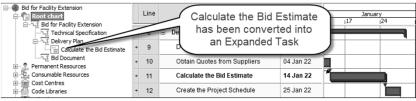
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Expanded Tasks

- Expanded tasks allow detailed planning to be hidden in turn allowing the uncluttering of a view with the detail readily available,
- They DO NOT operate like Microsoft Project Summary Tasks or P6 Hammocks,
- Expanded tasks are displayed as a normal task but the detailed tasks may be hidden and are held in a Sub Chart,
- The Project View displays Expanded Tasks nodes:



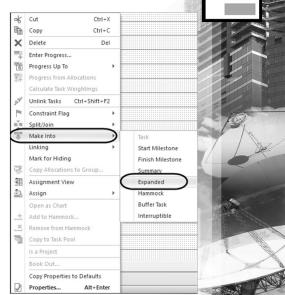
- Existing tasks may be converted into **Expanded** tasks and detail added below them or on new ones created,
- Tasks under an Expanded Task are called Subtasks.
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EASTWOOD HARRIS PTY LTD. Creating Expanded Tasks... ok Cut **№** Copy Ctrl+C To create an **Expanded** task either: X Delete Enter Progress... Create a new task in the normal way, or Progress Up To Progress from Allocations Calculate Task Weightings Select an existing task, W Unlink Tasks Ctrl+Shift+F2 Place the mouse over the task in the Gantt Constraint Flag Split/Join Chart and right click, Make Into Select Make into, Expanded, Finish Milestone

- At this point in time you may create detailed tasks under the **Expanded Task** and
- These new tasks are called **Sub tasks** that are held in a **Sub Chart**, which may be linked and resources allocated in the normal way.

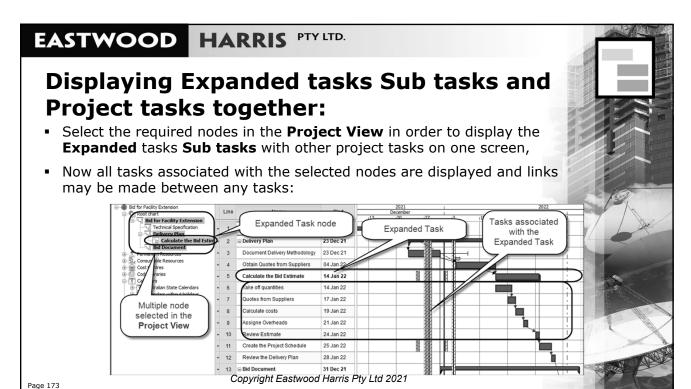


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Hammock Tasks

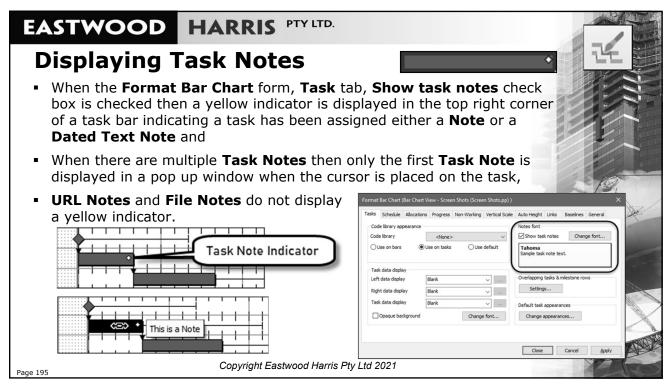
- Hammocks are used to summarise tasks that are not adjacent to each other,
- Unlike P6, Powerproject Hammock tasks do not have Links to the tasks assigned to the Hammock,
- Hammock start and finish dates are taken from the earliest and latest dates of their assigned tasks,
- Hammock durations are back calculated from the task dates over the calendar assigned to the Hammock,
- Expanding a Hammock will display the assigned tasks twice, in the chart and under the hammock,
- To create a Hammock, either:
 - Select an empty bar of your project by clicking on the line number, then select Home, Insert – Hammock, and enter the Hammock name, or
 - Draw a task, name it and then Right Click on the bar and select Make into,
 Hammock.

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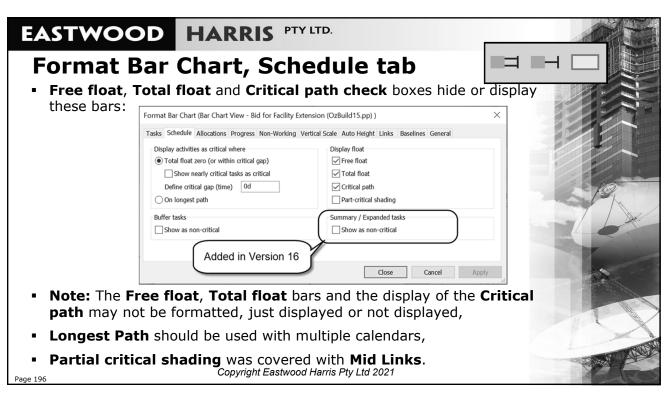
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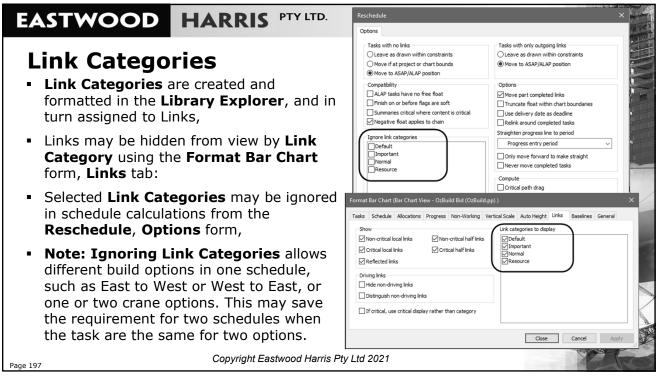
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Hammock



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Formatting the Spreadsheet using the Table function The formatting of the spreadsheet is achieved through the Table function, The Table formatting functions have far more options than P6 or Microsoft Project: Each date column may be formatted with a different date format, Most Baseline data fields may be viewed in columns, Columns may be created to display the data for one resource only and the resource data may be updated in a column, Note: The default Column title does not indicate that it is displaying

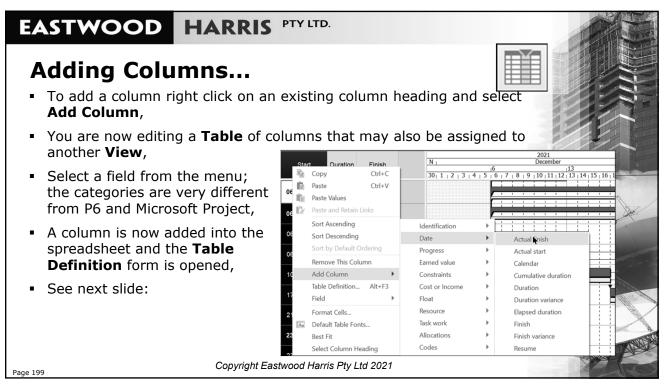
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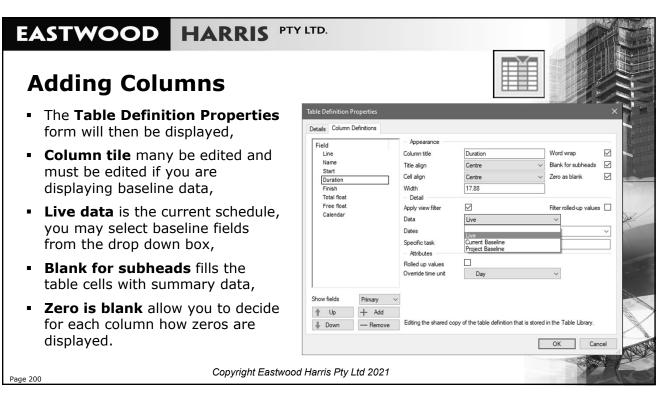
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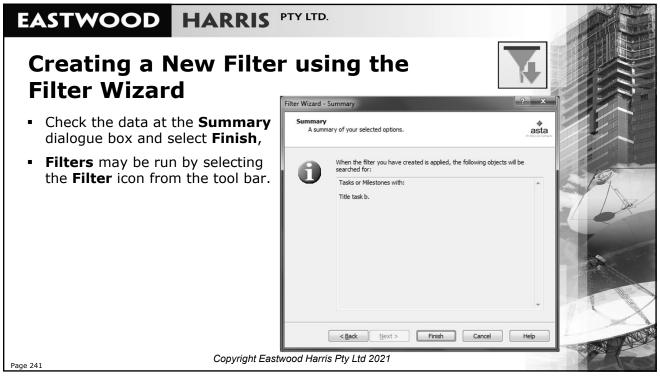
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baseline data, so when a baseline column is displayed the user must change the **Column title** so it is clear that it is displaying baseline data.

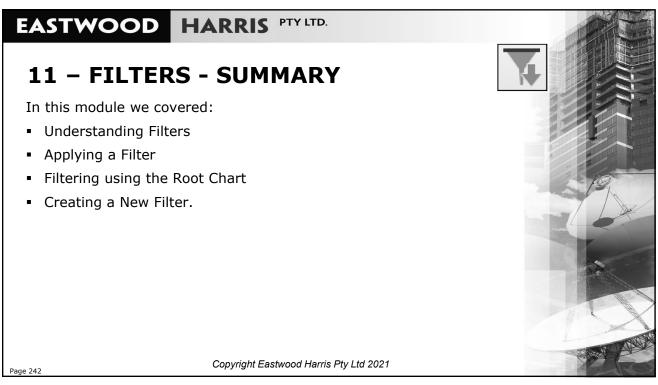


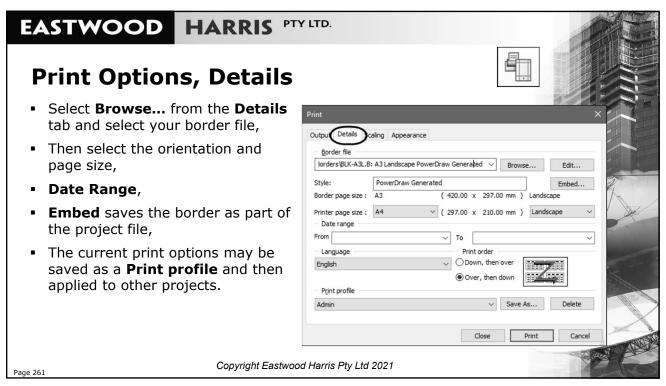
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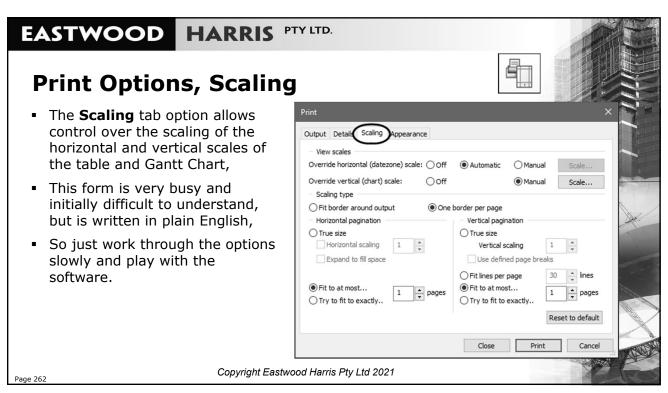


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Updating an Unresourced Project

There are two main methods used with Powerproject to update a schedule:

- The first method is to just enter the **Percent Complete** against each task which will show if activities are ahead or behind of the **Report Date**,
 - This does not reschedule incomplete work that is scheduled in the past forward in time into the future, or reschedule complete work scheduled in the future back to the past, both of these situations are illogical, and
 - This leaves a Jagged Report Line, and NOT considered a properly updated schedule,
- The second method is to Straighten the Report Line which reschedules:
 - Incomplete work into the future based on the logic and remaining durations, and
 - Moves complete work into the past, thus Actual Dates may not be correct but theses may be adjusted to produce a properly updated program,
- Note: P6 only updates a schedule with a Straight Report Line and this may be set as the default in Powerproject and the Jagged Report Line not used.

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Updating An Unresourced Project

- This module will look at two methods of updating a program with Powerproject
- The main steps for monitoring progress are:
 - Set the **Reschedule Options** to reflect how you wish to update your schedule,
 - Saving a Baseline schedule, covered in the last module,
 - Record or mark-up progress as of a specific date, know in Powerproject as the Report Date,
 - Update the schedule,
 - Straightening the Progress Line, forcing all incomplete work into the future and incomplete work into the past,
 - Comparing and reporting actual progress against planned progress and revising the plan and schedule, as required.

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EASTWOOD HARRIS PTY LTD. **Rescheduling with Progress** Scheduling will straighten Progress Line and: Push incomplete portions of tasks into the future and • Push completed work into the past: Before scheduling After scheduling • **Note:** Actual Dates will change when a complete part of a task was in the future, At this point it would be prudent to ensure the actual dates match when work actually started and finished, especially if your are entering into litigation. Copyright Eastwood Harris Pty Ltd 2021 Page 307

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Jagged Line to Straight Line Display If you have followed the update progress over multiple periods and Straightened the Progress Line each time, then you will have a project which will show: The progress for each period, and A revised end date of the project:

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Course Close

We have covered the following topics:

- Introduction to Powerproject and Creating a project
- Navigation and Setting Options
- Calendars
- Tasks and Milestones
- Summary Tasks
- Linking Tasks to create a Critical Path Schedule
- Constraints

- Other Task Types
- Formatting the Display
- Code Libraries
- Filters
- Organising Tasks using Sort and Groups
- Printing and Reports
- Baselines
- Updating an Unresourced Project
- User Definable Fields and WBS.



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Review Expectations

- Any questions,
- Complete Feedback Sheet,
- Have we met your expectations?



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