Asta Easyplan

Getting Started Guide

Version 7

Elecosoft®

Asta Easyplan: Simple planning tool for small projects
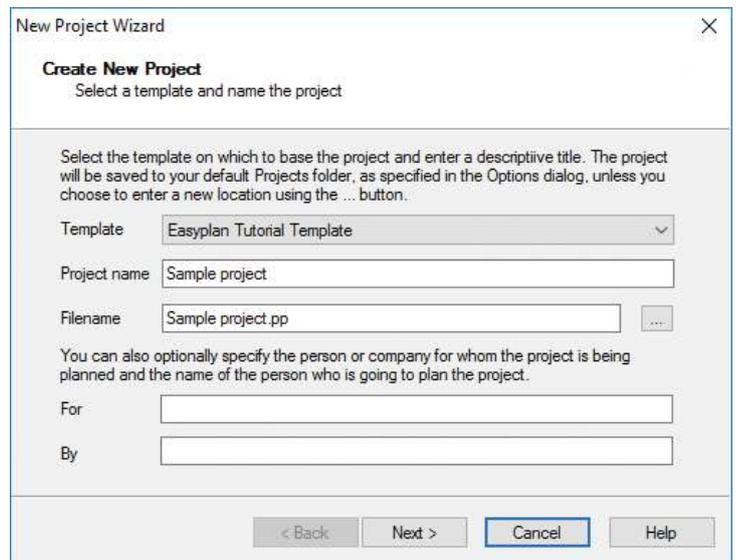
Asta Easyplan

This booklet is designed to help you start using Asta Easyplan as quickly as possible. As you work through this booklet, you will build up a small sample project. The techniques you learn as you do this will help you to plan your own projects using Asta Easyplan.

This booklet introduces you to the basics of Asta Easyplan. To learn more about what you can do with Asta Easyplan, refer to the Asta Easyplan Help and tutorial, which are available on the **Help** tab of the Backstage view.

CREATING YOUR FIRST PROJECT

1. Start Asta Easyplan from the Windows® **Start** menu.

2. Click **File**, then click **New**. The **New Project Wizard** appears.

3. Select *Easyplan Tutorial Template* in the **Template** field.

4. Enter a name for the project in the **Project name** field. The project's filename defaults to the project name that you have entered.

5. Click **Next**. The second screen of the wizard appears.

6. Specify the date on which you want the project to start in the **Start date** field, then click **Next**. The third screen of the wizard appears.

7. Select *Days* in the **Snapping time unit** field to specify that you will be planning the project in a time units of days, then click **Next**. The final screen of the wizard appears.

8. Click **Finish** to close the wizard and create the new project.

THE ASTA EASYPLAN WINDOW

The Asta Easyplan window comprises the following main elements:
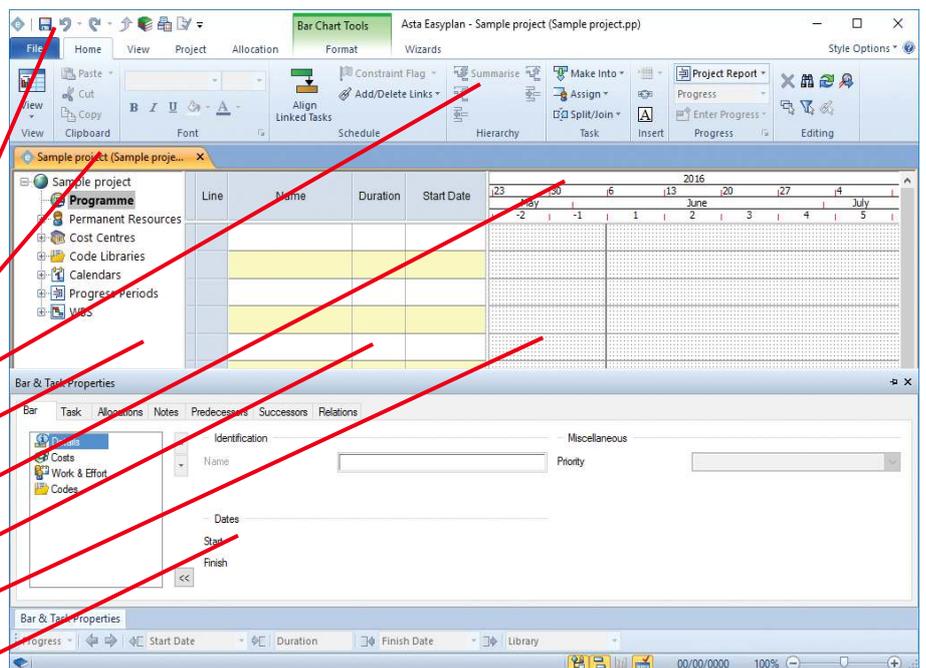
- Quick Access toolbar
- Tabs
- Ribbon
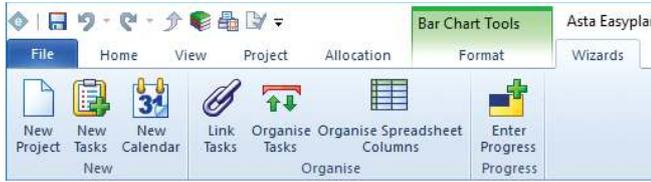- Project view
- Date zone
- Spreadsheet
- Bar chart
- Properties view

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CREATING YOUR FIRST TASKS

1. Click the **Wizards** tab of the Ribbon to display a list of the wizards available in Asta Easyplan.
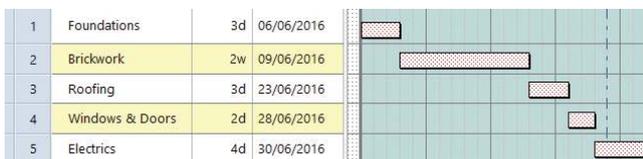

2. In the **New** group, click **New Tasks**. The **New Tasks Wizard** appears.

3. Click **Add**. A new row appears in the grid, representing a new task.

4. Click in the Task Name column and enter *Foundations*.

5. Click in the Duration column and enter *3*.

6. Follow the above three steps to create these four more tasks:

Task Name	Duration
Brickwork	10 days
Roofing	3 days
Windows & Doors	2 days
Electrics	4 days

| Task Name	Start Date	Duration	Time Unit
Foundations	06/06/2016	3	Days
Brickwork	09/06/2016	10	Days
Roofing	23/06/2016	3	Days
Windows & Doors	28/06/2016	2	Days
Electrics	30/06/2016	4	Days

7. Click **Next**. Ensure that the **Use the Link Tasks Wizard...** check box is selected on the following screen, then click **Finish** to close the wizard and create the tasks in the bar chart.
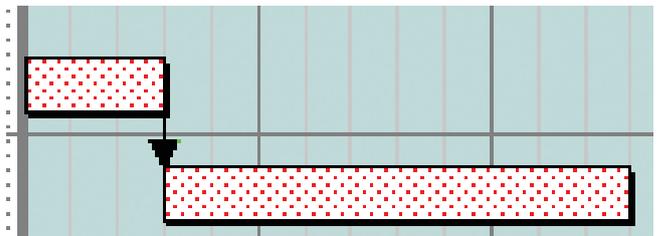

LINKING TASKS

The **Link Tasks Wizard** appears automatically as the **New Tasks Wizard** closes. This wizard provides you with a simple way of creating links, which specify the order in which tasks take place:

1. Click **Next** when you have read the wizard's introductory screen.

2. The second screen of the wizard displays two panes, each one listing the tasks in the project. Click the Foundations task in the left pane and click the Brickwork task in the right pane to indicate that you want to create a link from one to the other.
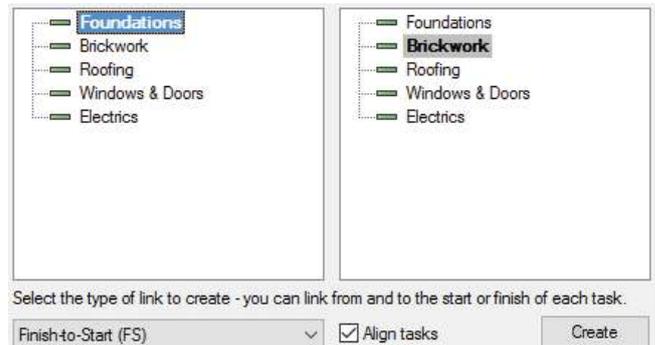

3. With *Finish-to-Start (FS)* selected in the **Select the type of link...** field and the **Align tasks** check box selected, click **Create**.

   A link is drawn between the two tasks and the start of the Brickwork task is aligned with the finish of the Foundations task.

4. Follow the above two steps to create two more Finish-to-Start links: one from the Brickwork task to the Roofing task and one from the Roofing task to the Electrics task.
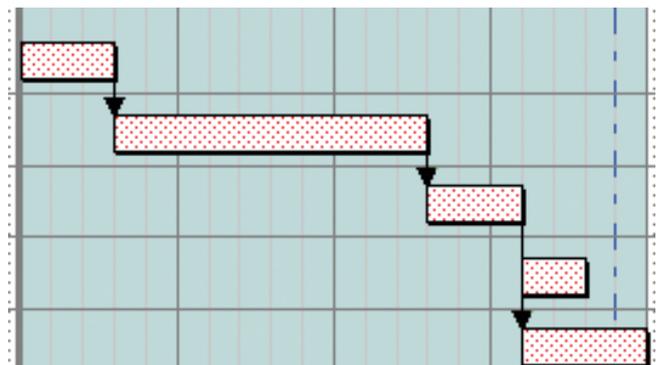

5. Click **Finish** when you have linked the tasks.

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You can also create links by drawing them directly in the bar chart. You will do this now by drawing a link from the start of the Roofing task to the start of the Windows & Doors task to indicate that they can start at the same time:
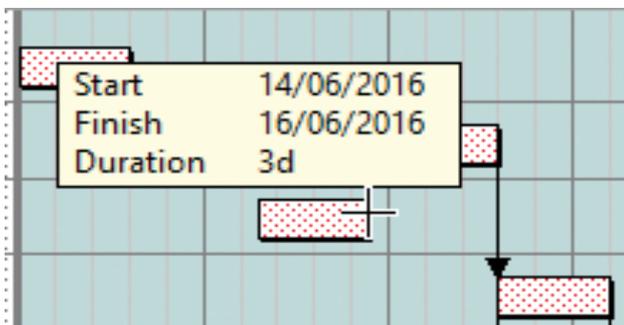
1. Position the mouse pointer at the bottom-left of the Roofing task so that the cursor changes to ⬚.

2. Hold down the left mouse button and drag the cursor away. Notice that a line now stretches from the task to the cursor.

3. Position the end of the link at the bottom-left of the Windows & Doors task, then release the mouse button.

   A link is drawn between the tasks, which are aligned so that they start on the same date.

4. Now draw a link from the finish of the Windows & Doors task to the start of the Electrics task.
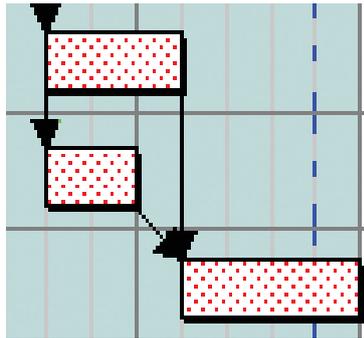
DRAWING TASKS IN THE BAR CHART

As well as using the **New Tasks Wizard** to create tasks, you can create them by drawing them directly in the bar chart. Here, you will insert a new blank bar into the project and draw a task on it:

1. Move the mouse pointer over bar 3 in the Line column of the spreadsheet, then click. Bar 3 – the bar containing the Roofing task – is selected.

2. Press **INSERT**. A blank bar is inserted above the Roofing bar.

3. Position the mouse pointer over the blank bar, hold down the left mouse button, then drag the cursor to the right. As you drag, a popup box displays the start date, finish date and duration of the task you are drawing.

4. Release the mouse button when the task is three days in length.

5. Click in the Name column of the spreadsheet in the new bar and enter *Plumbing*.

DRAWING MID-LINK TASKS

Links do not have to start and finish at the start or finish of tasks; they can start at any point along a task. Here you will draw a link between the Brickwork and Plumbing tasks that indicates that the Plumbing task can start two days after the Brickwork task has begun:

1. Position the mouse pointer at the bottom of the Brickwork task, two days to the right of the start of the task, so that the cursor changes to ⬚.

2. Hold down the left mouse button and drag the cursor away to the start of the Plumbing task. The two tasks are linked and the Plumbing task is aligned so that it starts two days into the Brickwork task.
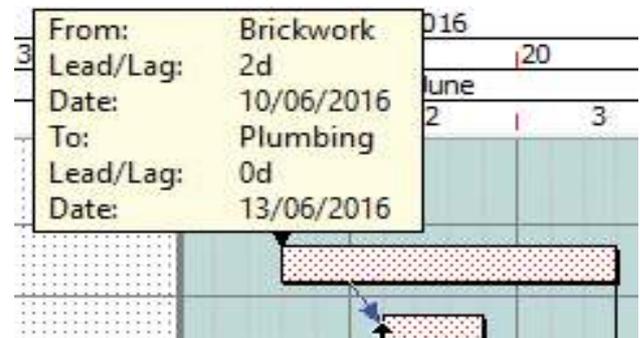
3. Now draw a link from the finish of the Plumbing task to the start of the Electrics task.

EDITING THE DURATION OF TASKS

To edit the duration of a task in the spreadsheet:

1. Click in the Duration column in bar 2 of the spreadsheet.

2. Change the duration of the Brickwork task to 8d (8 days) and press **ENTER**.

To edit the duration of a task in the bar chart:

1. Position the mouse pointer over the finish of the Foundations task so that the cursor changes to ✛.

2. Hold down the left mouse button, then drag to the right.

3. Release the button when the task is 4d (4 days) long.

Durations in Asta Easyplan can be shown as 'elapsed' or 'working' time. Elapsed time includes working and non-working time (eg holidays, weekends and evenings); working time excludes non-working time. By default, durations are shown in working time.

ALIGNING TASKS ACCORDING TO LINKS

Notice that as you have changed the duration of two tasks in the project, the tasks are no longer aligned correctly according to their links.

To re-align the tasks according to their links, on the **Home** tab of the Ribbon, in the **Schedule** group, click **Align Linked Tasks**.

SAVING YOUR PROJECT

You may have noticed that the bars you have edited have been coloured blue. This colouring indicates that the work on the bars has not been saved. The blue colouring disappears when you save the project.

To save your project, click 💾 in the Quick Access toolbar. It is good practice to save regularly.

COLOUR-CODING TASKS

You can colour-code the tasks in your projects so that their appearance represents something relevant to you. You use code libraries to do this. For example, you could use them to show the department or person responsible for each task, or the location of each task.

You create code libraries in Library Explorer, then assign them to tasks. In this example, you will use codes that are already set up.

ASSIGNING CODES TO TASKS

1. Click the + next to Code Libraries in the project view to view the code libraries that are set up in the template.

2. Click the + next to the Floor Level code library to view the codes it contains.

   You can assign codes to tasks by dragging and dropping them onto tasks from the project view.

3. Drag the Ground code and drop it onto the Foundations task. A dialog appears, asking whether you would like to display codes from this library in the bar chart.

4. Click **Yes**. The task is coloured according to the code you have assigned to it.

5. Drag and drop appropriate codes onto the rest of the tasks. Their appearance changes according to the codes you assign to them.
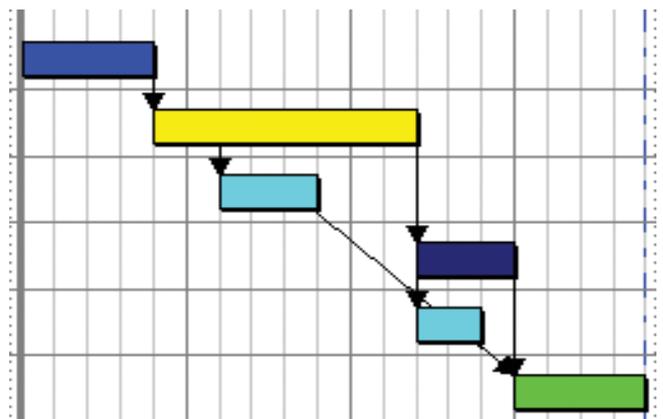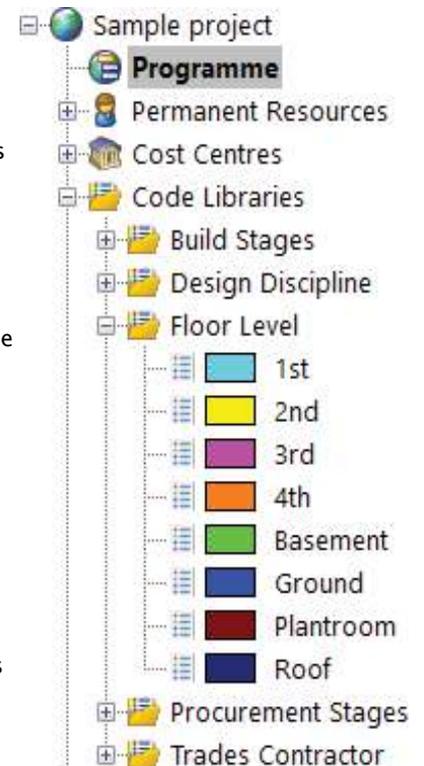
WORKING WITH RESOURCES

You can use Asta Easyplan to plan the resources you will use in a project: permanent resources such as people and machinery, and consumable resources such as materials, components and utilities.

You can create your own resources in Library Explorer. In this example, you will work with resources that are already set up in the template.

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ASSIGNING RESOURCES TO TASKS

1. Click the + next to Permanent Resources in the project view to view the permanent resources that are set up in the template.

2. Drag the Plumbers resource and drop it onto the Plumbing task.

3. Drag the Carpenters resource and drop it onto the Windows & Doors task.

4. Drag and drop the Electricians resource onto the Electrics task. Allocation bars appear below the tasks, indicating which resources have been assigned to the tasks.
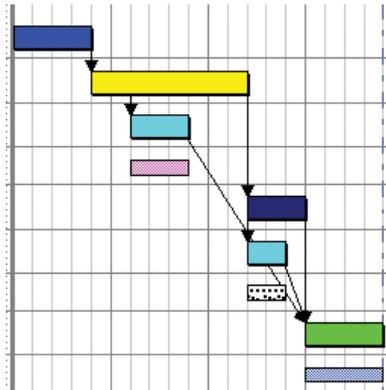
VIEWING AN ALLOCATION HISTOGRAM

You can use histograms to graph detailed cost and resource information, highlighting important details that are updated in real time:

1. On the **View** tab of the Ribbon, in the **Graph** group, click **New Histogram**. A new pane appears below the project view, spreadsheet and bar chart:
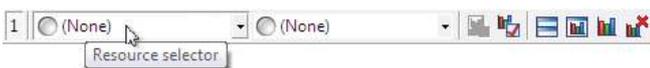
2. Click the **Resource Selector** field in the new pane and select the check boxes to the left of the Carpenters, Electricians and Plumbers resources.

3. Click the **Report Selector** field and select *Allocation, Availability and Over Allocation*. A histogram appears, showing the allocation of the selected resources.
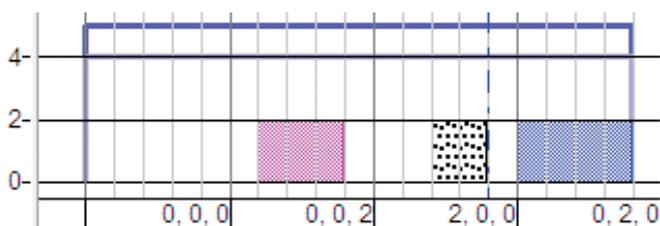
GROUPING RELATED TASKS TOGETHER

You can group related tasks together using summary tasks. A summary task takes its position and duration from the position and duration of the tasks within its summary group.

1. On the **Wizards** tab of the Ribbon, in the **Organise** group, click **Organise Tasks**. The introductory screen of the **Organise Tasks Wizard** appears.

2. Click **Next** to view the second screen.

3. Select the check boxes next to all of the tasks in the project except the Foundations task.

4. Enter *Post-Groundwork* in the **Enter a name for the summary task** field and click **Finish**. The selected tasks are grouped together by a summary task. Note that the bar on which the summary task is located is highlighted with a different background colour.
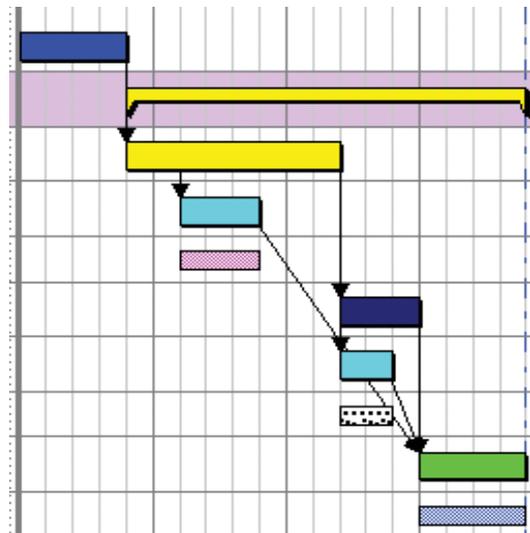
PROGRESSING A PROJECT

You progress projects to keep them up to date. One of the easiest ways of doing this is by using the **Enter Progress Wizard**:

1. On the **Wizards** tab of the Ribbon, in the **Progress** group, click **Enter Progress**. The first screen of the **Enter Progress Wizard** appears.

2. Click **Next** to view the second screen.

3. Select the check box next to the Foundations task to indicate that you want to progress it, then click **Next** to view the final screen.

4. Click in the Percent Complete column and enter 50, click outside the field then click **Finish**. The Foundations task is now shown to be 50% complete.
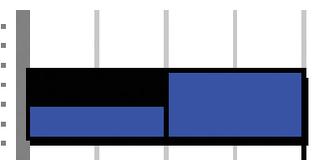
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PRINTING A PROJECT

Asta Easyplan offers you a wide range of printing options, which are all accessible on the **Print** dialog.
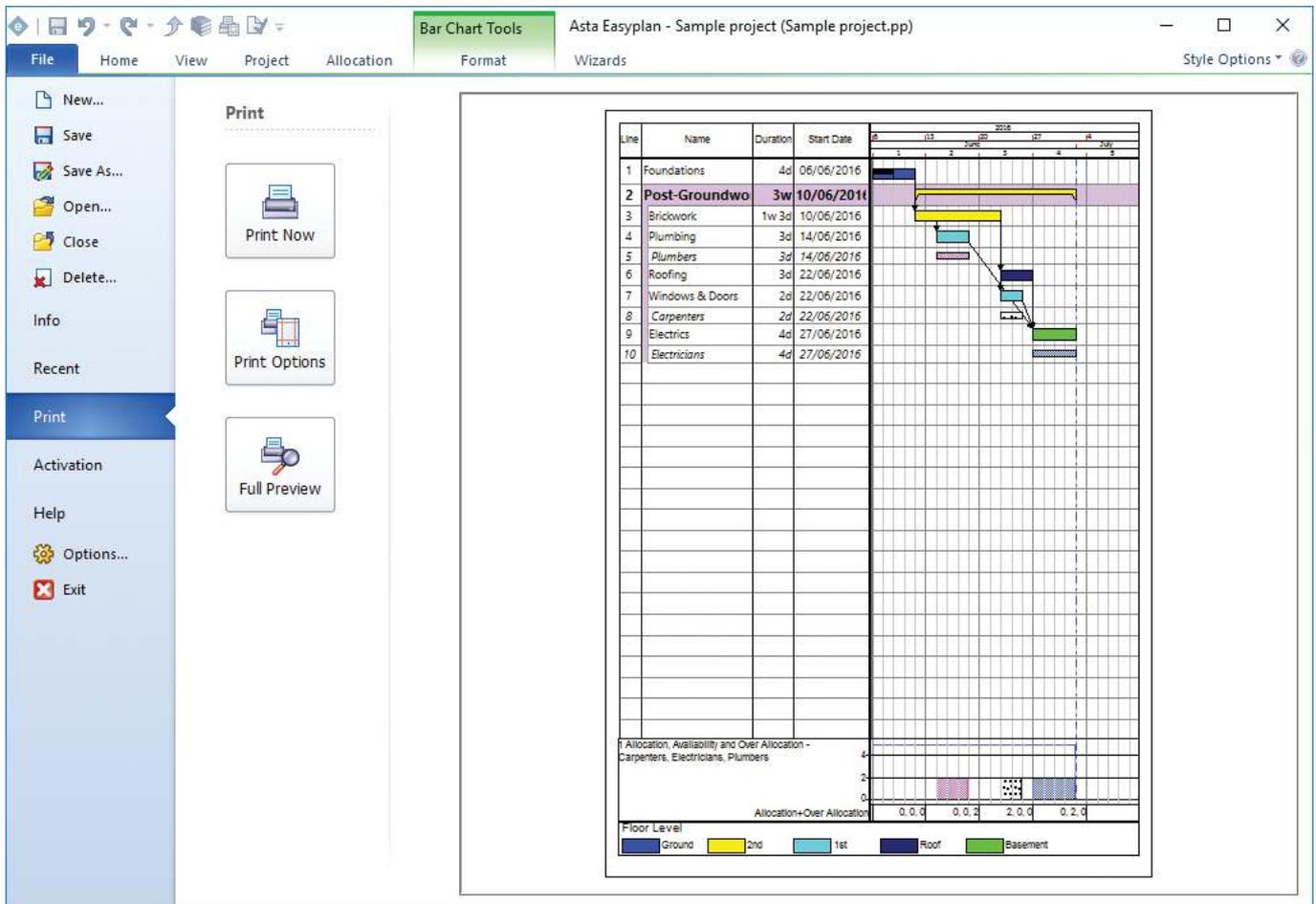
To exclude items from a printout, format the bar chart and exclude the items from the current view before you print. For example, you may want to exclude links, progress or allocations, depending on who is to view the printout.

You can also use the controls in the **Show/Hide** group on the **Format** tab of the Ribbon to turn elements of the display on and off instantly:

To create a simple printout of the current view:

1. Click **File**, then click **Print**. The **Print** tab of the Backstage view appears, displaying a preview of what the output will look like.

GETTING HELP

Asta Easyplan's online help provides you with all the information you need to use Asta Easyplan to the full. To access the help:

- Press **F1** to access help about the current dialog.

- Click **File**, click **Help**, then click **Help**.

Use the Contents and Index tabs and the Search facility to locate the information you want.

2. Click **Print Now**. The output is sent to your default printer.

astapowerproject.com/software/asta-easyplan

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