

ProPoc V2.0

- Projects in my Pocket -

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ProPoc is a project planner for the PSION Series 3 family of computers.

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ProPoc 2 is an advanced project management system that allows to administer multiple projects of interconnected elementary tasks.

ProPoc supports resource competition on a priority basis, resource levelling, and various scheduling strategies. ProPoc automatically creates time schedules reflecting interdependency and resource utilisation.

ProPoc also generates cost estimations and allows to track the project progress.

ProPoc supports the definition of workdays and rest days based on a central calendar. It supports nationalised public holidays.

A variety of customisable output options allows to print project plans and to export data into other applications such as the word processor, the spreadsheet application, or third party project management software.

ProPoc is the perfect project planner for people on the move.

Berthold Daum

produces a series of applications for PSION Series 3 computers:

ProPoc	project planner
HyperPoc	hypertext and hypermedia system
RepPoc	Mail merging and report writing
PicPoc	high end painting program
PocView	GIF, PCX, PIC-viewer
MusiPoc	music player and editor
F11	WORD enhancements
PocDoc	health monitor

Contents

Introduction	7
1 Basic concepts	7
1.1 Files	7
1.1.2 Time	8
1.1.2.1 The Time Base	8
1.1.2.2 The Calendar	8
1.1.3 (P) Baselines	10
1.1.4 (P) File links	10
1.1.4.1 (P) Subprojects	10
1.1.4.2 (P) Masterfile	10
1.1.5 Reordering ProPoc files	11
1.2 Resources	12
1.2.1 Resource definition	12
1.2.2 (P) Resource calendar	14
1.3 Projects	15
1.3.1 Project attributes	16
1.3.2 Calculated attributes (Project Statistics)	17
1.4 Tasks	18
1.4.1 Attributes	19
1.4.2 Calculated attributes	22
1.4 Links	23
2 The User Interface	25
2.1 The main screen	25
2.1.1 Graphic mode	25
2.1.2 Table mode	27
2.1.3 PERT mode	29
2.1.4 Navigation	29
2.1.5 Key Short-cuts	30
2.2 Split screens	31
2.2.1 Resource schedule	31
2.2.2 Cashflow analysis (P)	31
2.3 Report boxes	32
2.3.1 Resource schedule	32
2.3.2 Cumulated resource schedule	32
2.3.3 (P) Quick schedule	32
2.3.3 (P) Cashflow analysis	33
2.3.4 (P) Review baseline	33
2.3.5 (P) Bottleneck analysis	33

2.4	Definition boxes	34
2.4.1	Weekday	34
2.4.2	Global public holidays	34
2.4.3	Custom public holidays	35
2.4.4	Calendar exceptions	35
2.4.5	Resources	35
2.4.6	(P) Resource calendar	35
2.4.7	Table definition	36
2.5	Entering date and time	36
3	ProPoc and the rest of the world	37
3.1	System settings that control ProPoc	37
3.2	Printing in ProPoc	37
3.1.1	Printing from the main screen	37
3.1.2	Printing from a report box	38
3.3	ProPoc and WORD	38
3.4	(P) ProPoc and HyperPoc	38
3.4	Output to the Spreadsheet application (P)	39
3.5	Alarms	40
3.6	(P) ProPoc and the AGENDA	40
3.6.1	(P) AGENDA alarms	40
3.6.2	(P) Import of resource calendar exceptions	41
3.7	(P) The MPX-interface	42
3.7.1	Export to MPX-file	42
3.7.2	Import from MPX-file	44
4	Function reference	46
4.1	File title	46
	<i>New file</i>	46
	<i>Open file</i>	46
	<i>Save as</i>	47
	<i>Print</i>	47
	<i>(P) Outline</i>	48
	<i>(P) Detail</i>	48
	<i>(P) Baselines</i>	49
	<i>Reorder</i>	49
4.2	Resource title	49
	<i>Define Resource</i>	49
	<i>(P) Resource Calendar</i>	49
	<i>Resource Schedule</i>	50
	<i>(P) QuickSchedule</i>	51
	<i>(P) Bottlenecks</i>	51

4.3 Project title	52
<i>Insert</i>	52
<i>Modify project</i>	52
<i>Remove project</i>	52
<i>Statistics</i>	53
<i>(P) Cashflow</i>	53
<i>(P) Review baseline</i>	53
<i>Switch project</i>	54
4.4 Task title	54
<i>Edit task</i>	54
<i>Copy task</i>	55
<i>Cut task</i>	55
<i>Delete task</i>	55
<i>(P) Repeat task</i>	55
<i>Show Info</i>	56
<i>Associated document</i>	56
<i>Remove document</i>	56
4.5 Link title	56
<i>Link</i>	56
<i>Unlink</i>	57
<i>Go to prerequisite</i>	57
<i>Go to depending</i>	57
<i>Show links</i>	57
<i>Hide links</i>	58
4.6 Scan title	58
<i>Find</i>	58
<i>Find next</i>	58
<i>Find previous</i>	58
<i>Jump to date</i>	59
4.7 Special title	59
<i>About</i>	59
4.7.1 Preferences	59
<i>Calendar - Weekdays</i>	59
<i>Calendar - Public holidays</i>	59
<i>Calendar - Exceptions</i>	60
<i>Calendar - Global holiday file</i>	60
<i>Other Preferences - View</i>	61
<i>Other Preferences - Format</i>	62
<i>Other Preferences - Table definition</i>	62
<i>Other Preferences - Mode</i>	63
<i>Other Preferences - Alarm, Agenda</i>	63

<i>(P) Other Preferences - Locations</i>	64
<i>(P) Other Preferences - File links</i>	64
<i>Zoom in</i>	64
<i>Zoom out</i>	65
<i>(P) Password</i>	65
<i>Printer setup</i>	65
<i>Exit</i>	66
4.8 Diamond title	66
<i>Normal mode</i>	66
<i>Condensed mode</i>	66
<i>Table mode</i>	66
<i>PERT mode</i>	66
Appendix A - The help system	67
Appendix B - The ProPoc directory structure	68
Index	69

Introduction

ProPoc is available in two different versions:

ProPoc LITE
ProPoc PROF

ProPoc PROF has additional functions.

Functions only available in ProPoc PROF are indicated with (P).

1 Basic concepts

1.1 Files

In ProPoc files and projects are different concepts. One file can contain up to 15 projects. Projects in one file share resources and share the same preferences and calendar settings. Projects in different files cannot share resources and have separate calendar settings.

(P) Projects within one file can be linked to each other as prerequisites.

(P) Files can be imported into other files as subprojects.

(P) Resource and calendar settings can be imported from Masterfiles.

	Menu	Key
Create a new file	File-New	PSION-N
Open a file	File-Open	PSION-O
Print	File-Print	PSION-P
(P)Save as	File-Save as	PSION-A
(P)Toggle Outline	File-Detail/Outline	PSION-Shift-O
(P)Set Baseline	File-Baseline	PSION-Shift-K
(P)Review Baseline	Project-Review_baselin	PSION-Shift-V
Reorder	File-Reorder	PSION-*
Preferences	Special-Preferences	PSION-Q
Exit	Special-Exit	PSION-X

Each project file can contain:

1 calendar
15 projects
224 activities
56 milestones
15 resources
1 set of Preferences
4 baselines (P)

1.1.2 Time

1.1.2.1 The Time Base

The standard time unit are days. Durations are specified in workdays, resource costs are defined as costs per day, and so on. Certain days can be restdays, such as weekends or public holidays. ProPoc files can cover approximately 89 years starting at the 1/1/1970.

(P) Optionally you can define a finer granularity of time. When a new file is created you are prompted for the time units: days, hours, minutes. This is the only time when you can define the granularity of time, you cannot change this setting for an existing file. This setting allows you to define durations and dates with the precision of hours or minutes. It will switch also the display and diagram printing to time units of hours or minutes.

Files with a finer granularity can cover only a short period:

- Hours: approx. 3 years
- Minutes: approx. 3 weeks

However, these are maximum values. A more practical approach would be to use minutes for projects lasting a day or two, and to use hours for projects below 3 months.

☞ *Some operations can only be applied to dates after 1/1/1995 if the time unit was set to minutes.*

1.1.2.2 The Calendar

Each file has one calendar. All calendar definitions are made through the *Preference*-function.

A calendar is made up from three basic definitions:

1. Definition of workdays and restdays for the week
2. Definition of up to 30 public holidays (per annum)
3. Up to 40 calendar exceptions (in total)

When creating a new project file, first specify the weekdays. Then specify which custom public holidays do apply, finally specify the calendar exceptions.

1. The definition of workdays and restdays is straight forward.
The default setting is taken from the system settings made in the *Clock* application. Use the *Preferences-Week* function to make project specific changes. Select *Work* or *Rest* for each day.

(P) If the time unit was set to hours or minutes you can define the working hours for each day separately. Position the cursor to a weekday and press TAB to enter or modify the work hours. You can define up to 4 work periods per day.

The default setting is 9:00 am to 5:00 pm.

Another popular setting would be: 9:00 am to 12:00 pm, 1:00 pm to 6:00 pm.

☞ *When the time unit was set to hours, time specifications are truncated to full hours.*

- Public holidays are controlled by a global public holiday file. This file is usually supplied with ProPoc and applies to all project files. During installation you had been able to select a specific public holiday file for your country. If not, you can edit the current public holiday file to your requirements using the *Global holiday file*-function in *Preferences*.

The public holidays are defined as algorithms rather than as individual dates. Therefore the definition of each public holiday is valid for any year.

The global holiday file applies - as the name says - to all project files.

It classifies its entries into three categories:

- *always*: The holiday is applied unconditionally to all project files
- *custom*: You can activate or deactivate the holiday for each project file separately.
- *never*: The entry is inactive and is not applied to any project file

- The calendar exceptions allow to declare certain intervals as workdays or rest days. The calendar exceptions will override any week or holiday definitions. You can set restdays to workdays and vice versa.

☞ *You can nest exceptions: For instance, you want to define the whole March as a work period but the 15th of March as a rest day. You define the first exception by setting the interval from 1st to 31st of March to work, the second exception then sets 15th - 15th March to rest.*

(P) When defining calendar exceptions for files with a time unit of minutes or hours, you enter also "from" and "to" times.

Example:

The exception 1Mar96-14Mar96 : 12:00 pm - 1:00 pm : Rest would define a rest hour after noon for each day between 1st and 14th of March. Again, it is possible to nest these definitions.

☞ *When the time unit was set to hours, time specifications are truncated to full hours.*

1.1.3 (P) Baselines

Each file can contain up to 4 baselines. Baselines store historical information about the projects and tasks within a file. Each baseline is identified with the date and time of its creation (*Set baseline*). The function *Review Baseline* compares a baseline with the current state of the file.

1.1.4 (P) File links

1.1.4.1 (P) Subprojects

For large projects it might be advisable to segment the project plan into several independent files. The summary information of those segments can be then imported as new entities (subprojects) into the main project file.

A file can be declared as a subproject via *Other Preferences, File Links*. By default the subproject option is set to YES. If you do not plan to use the file as a subproject, select NO. This will speed up the closing of a file.

Subprojects can impose a workload on resources in the main file. This workload is computed from the average workload in the subproject file.

However, resource clashes in the main file cannot back-influence the subproject - computation of a subproject file is performed without knowledge of the contents of the main file.

When a subproject was changed, the contents of the main file is automatically updated when the main file is opened.

☞ *Files with a smaller time unit can be used as subprojects in files with a larger time unit, but not vice versa. For instance, a minute based file can be used as a subproject in a hour based file.*

☞ *To open a subproject file, place the cursor on the subproject and press PSION-O.*

1.1.4.2 (P) Masterfile

Theoretically, calendar and resource definitions in a subproject file and the main file can be different. This, as a matter of fact, is not good style and could lead to surprising results. To synchronise the calendar and resource definitions of two independent files, use the master file concept. For the subproject file set the *Masterfile* option in *Other Preferences, File Links* to YES and select the main file as a master file.

Now every time the subproject file is opened, its calendar and resource definitions will be synchronised with that of the master file.

☞ *It is not possible to use a masterfile with a different time base.*

1.1.5 Reordering ProPoc files

As you change ProPoc tasks, create new dependencies between tasks, or change the workload on resources, vital project dates like begin or finish of tasks may need recomputation. This can be done in a automated fashion or manually, depending on the definitions in *Preferences, Mode*.

In automatic mode ProPoc will reorder the project file whenever a change has been made that could effect start or finish date of tasks.

In manual mode ProPoc reorders the project file when the Reorder function is invoked. An indicator in the bottom right corner of the screen is visible when a reorder is needed.

In both modes ProPoc reorders the project file in the following cases:

- a file is closed and needs to be ordered. (This will happen in the background if you had exited ProPoc).
- a file is opened and is found in non-ordered state.
- you invoked a function that needs the file in ordered state, like printing or exporting.

The manual mode is best used with large project files where frequent reordering would cause unduly delays.

☞ *You can do longer reorders in the background and do other things with your palmtop in the meantime. Simply press the SYSTEM button after you have initiated the reorder. ProPoc will give a short beep when a manual reorder was completed.*

ProPoc allows certain commands to interrupt the reorder process. Depending on the command the reorder process is

- continued and finished before command execution
- aborted and not restarted
- aborted and restarted after command execution.

(P) The number of activities directly influences the performance. If a project becomes too big, it might be worthwhile to segment it into subprojects.

Resource sharing slows down the reordering process considerably. ProPoc might have to shift around activities many times until a good solution is found. The more resources you use, the more likely this is going to happen.

It might be a good idea to switch off resource levelling in the initial design phase (*Preferences, Mode*). You will be still able to define resources and enter workloads, but recalculation will be factors faster as with resource competition. In the final design phase switch resource levelling on again.

1.2 Resources

1.2.1 Resource definition

	Menu	Key
Define resource	Resource-Define	PSION-Shift-H
Resource calendar	Resource-Calendar	PSION-Shift-A
Display schedule	Resource-Schedule	PSION-H
(P) Bottleneck analysis	Resource-Bottlenecks	PSION-Shift-B
Switch resources off	Special-Preferences/Mode	PSION-Q,M

Each ProPoc file can contain up to 15 different resources. Anything can be defined as a resource, a person, a group of persons, a machine, a room, etc. Resources can be shared between tasks, even between projects.

Attributes

Name:

Name of a resource up to 15 characters long.

☞ *Resource names must not contain a comma.*

(P) Capacity:

Defines the capacity of a resource. This parameter can be used to reflect the number of persons in a group.

Since in ProPoc workloads are specified in percent of the total capacity the *Capacity* parameter does not directly influence resource scheduling.

However, if you change the capacity of a resource you have the option to have all workloads changed accordingly.

Example:

You change the capacity from 1 to 2. All workloads for that resource would be divided by 2.

Workload:

Constant

The workload applied by an activity is applied with the same amount for each day during the whole duration. If the total workload for the resource exceeds the maximum utilisation (normally 100%) the activity is postponed.

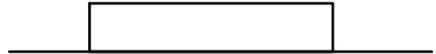
In ProPoc resource overallocation can never happen!

(P) You can, however, make a resource available more than 100% by editing the resource calendar.

(P) *Flexible*

The resource is allowed to vary the actual workload during the duration of an activity, as long as the average matches the specified workload. This mode reduces the number of resource conflicts and shortens the total project duration. It may, however, not be appropriate for certain resources.

☞ *In this mode short periods of overallocation may appear in a resource schedule. These are compensated by following periods of underallocation.*

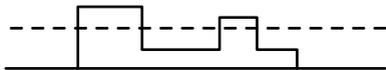


Cost per workday:

Defines the cost rate of the resource per workday.

For a work group define the cost of the whole group, not of a group member.

Costs are applied for each workday a resource is used by an activity.



(P) **Overtime surcharge in %**

The overtime surcharge is applied when a resource is used by more than 100% and for the excess time only (this is only possible if the maximum utilisation had been set to more than 100% in the resource calendar). The valid range for the surcharge is 0-500%.

Cost per activity:

These costs are one-off costs applied for each activity that uses the resource.

rated:

full time

The resource costs are applied to 100% independent from the actual workload for each activity that uses the resource.

part time

The resource costs are applied according to the actual workload.

☞ *This rating is the most compatible with third party project management software.*

shared in project

The full resource cost (100%) is divided between activities in the same project that use the resource. The ratio depends on the workloads from each activity of the resource.

shared overall

The full resource costs (100%) are divided between all activities that use the resource. The ratio depends on the workloads from each activity of the resource.

Example:

Activity 1 uses a resource to 30% and has a duration of 5 days.

Activity 2 uses the same resource to 20% and has a duration of 4 days.

Both activities overlap for 3 days.

Days 1 and 2: Activity 1 is the sole user and pays 100% each day.

Days 3,4,5 : Both activities share the resource. The total utilization is 50%

Activity 1 is charged with $30/50 = 60\%$ for each day

Activity 2 is charged with $20/50 = 40\%$ for each day

Day 6: Activity 2 is the sole user and pays 100% each day

☞ *The total project costs may change if a project is reordered and if cost ratings other than part time are used.*

☞ *Resource costs are applied in full to all activities or in the ratio of completion depending on the setting in Preferences-Mode.*

1.2.2 (P) Resource calendar

Each resource can have additional calendar modifications.

You can specify the maximum resource utilisation (0-150%) for up to 36 different intervals. This function can be used to specify times of unavailability or increased availability for each resource individually.

To specify resource calendar events, invoke the *Resource Calendar* function. Press TAB on an existing item or insert a new item. Then enter the start date, end date and the availability. The setting will be applied to all workdays between the start date and the end date.

If the time unit was set to hours and minutes, you will enter the start date and end date with full time specification. The exception is applied to all work hours between the specified start and the specified end.

☞ *If the time unit was set to hours, time specifications are truncated to full hours..*

A special function allows to derive resource calendar exceptions from the contents of the S3a-AGENDA-file. This is explained in detail in the AGENDA-link chapter.

☞ *Resource exceptions cannot override restdays and holidays set in the general calendar. They are only applied to workdays.*

1.3 Projects

	Menu	Key
Insert a new project	Project-Insert	PSION-I
Modify a project	Project-Modify	PSION-M
Remove a project	Project-Remove	PSION-V
Display project statistics	Project-Statistics	PSION-S
Switch to another project	Project-Switch	PSION-T
	or	TAB
	or	Shift-TAB
(P) Project outline	File-Outline	PSION-Shift-O
	or	CONTROL-TAB
(P) Functions in Outline mode:		
Project detail	File-Detail	PSION-Shift
	or	CONTROL-TAB
Modify project	Item-Edit	PSION-E
	or	ENTER
Remove project		DEL
Project statistics	Item-Show	PSION-W
Edit associated document	Item-Associated	PSION-+
Remove associated document.	Item-Remove_doc	PSION--
Find project	Scan-Find	PSION-F
Find next	Scan-Find_next	PSION-G
Find previous	Scan-Find_prev	PSION-R
Jump to date	Scan-Jump	PSION-J

One ProPoc file can contain up to 15 projects.

1.3.1 Project attributes

Name:

a unique name (up to 15 characters)
We recommend to use alphanumeric characters.

☞ *Project names must not contain a comma.*

Description:

up to 255 characters of text

(P) WBS:

The work breakdown structure specifier. Up to 12 characters, for instance 2.3.1. ProPoc will propose a WBS value for new projects.

(P) HyperPoc link:

Hotlink to a HyperPoc card. Please see the chapter on HyperPoc.

(P) Location:

7 different locations can be selected. Locations are used for resource control. A resource cannot be used in different locations at the same time. Specify "global" if no location control is wanted.

For a new file only "global" and 7 locations with default names are available.. Specify your own location names via *Preferences-Locations* (PSION-Q-PSION-L).

(P) disabled:

Set to YES to study the effect of dropping a project.

Disabled projects are not considered in overall cashflow analysis, or overall resource schedules. They are not used as prerequisites, and do not allocate resources. They are not printed with "print all projects" functions, and are not exported to spreadsheet or MPX.

Rank:

1 for high, 15 for low.

Ranks are unique. Each project has a different rank. ProPoc will automatically arrange ranks in consecutive order.

Example 1:

*Define a new project with rank 3.
Existing projects with ranks 3-6 are pushed downwards to ranks 4-7*

Example 2:

*Change the rank of an existing project from 1 to 3.
Existing projects with ranks 2 and 3 are pushed upwards to rank 1 and 2*

High ranks (= low number) win in resource conflicts between projects.

Planned start:

Official project start date. All tasks within this project will start after this date.

Budget:

The total amount of money budgeted for this project.

Use negative numbers for planned earnings.

Alarm:

Activity: none, all, critical (P) (includes subprojects)

Milestone: none, all, critical

Resource 1 and 2: any of the defined resources

ProPoc raises an alarm for each of the specified events here. If alarm is specified for a resource, alarm will be raised whenever an activity of this project uses the specified resource. Alarms can be raised through the Morpheus alarm handler or (P) can be exported to an Agenda file through the Agenda link. For further information on alarms see the Alarms chapter.

Alarm advance:

Defines the advance time for the above specified alarm events. This is specified in days (or in minutes if the time unit is hours/minutes).

1.3.2 Calculated attributes (Project Statistics)

Duration:

Start date and end date of the project. The end date is defined by the end date of the latest task in that project.

The difference between end date and start date in workdays (or work hours, work minutes) is shown in parenthesis. This value excludes any rest periods.

completed:

The percentage of completed workdays (or work hours, work minutes).

(P) Links:

Prerequisite projects for this project.

Links between projects are defined using the Link-function in Outline mode.

(P) required by

Projects depending on this project.

Links between projects are defined using the Link-function in Outline mode.

Activities:

number of activities in this project.

The number of closed activities is shown in parenthesis.

Critical:

A list of critical activities in this project. Closed activities are not considered critical.

Hot milestones:

A list of critical milestones. Closed milestones are not considered critical. Milestones that do not have prerequisites are considered as closed and not critical.

Total costs:

Costs accumulated from all activities and resources used in this project. The defined budget for the project and the sum of budget amounts from all activities in the project is displayed with this figure for comparison.

Example:

Cost,Budget: 3000, 2500/2900 shows that the actual costs are 3000. The budget defined for the project was 2500, while the sum of budgets for the activities of this project exceeds the project budget by 400.

Resource costs are optionally applied to all scheduled work or only to the completed work. This can be set in *Preferences-Mode*.

☞ *The currency is taken from the system settings. It is possible to override this setting for individual files via Preferences-Format*

Workload (Average):

The average workload caused by this project is shown for each resource. This is calculated from the workload defined with each activity.

1.4 Tasks

Menu	Key	
Create a task.	Project-Insert	PSION-I
Modify a task.	Item-Edit	PSION-E
	or	ENTER
Cut a task.		DEL
Delete a task.		Shift/DEL.
Copy a task.	Item-Copy	PSION-C
Repeat task	Item-Repeat	PSION-Shift-R
Show task info	Item-Show	PSION-W
Edit associated document	Item-Associated	PSION-+
Remove associated document.	Item-Remove_doc	PSION--
Find task	Scan-Find	PSION-F
Find next	Scan-Find_next	PSION-G
Find previous	Scan-Find_prev	PSION-R
Jump to date	Scan-Jump	PSION-J

Tasks can be activities, milestones or (P) subprojects.

- An activity is the basic entity of a project that must be performed to complete the project. Most important, activities have a duration, can use resources, and imply costs.
- Milestones are used to demarcate a certain step in project development. Milestones do not have a duration, do not use resources, and do not imply costs.
- (P) Subprojects are similar to activities but their duration, resource workload, and cost is derived from the content of a subproject file (another ProPoc file). Please see the chapter about File Links for information about subprojects.

Each task can be the prerequisite of another task. These link relationships are defined with the Link-function. For more information see the chapter about Links.

ProPoc will generate project plans in such a way that no resource is used more than 100 percent (or whatever the defined availability is). In cases of a resource conflict, the activity belonging to the project with the higher rank (smaller rank number) will win. In cases of a resource conflict within the same project (i.e. with the same priority) the activity with a higher priority (smaller priority number) will win.

1.4.1 Attributes

Name:

unique name. Up to 7 characters. We recommend alphanumeric characters.

☞ *Task names must not contain a comma.*

Description:

up to 255 characters of text.

(P) WBS:

The work breakdown structure specifier. Up to 12 characters, for instance 2.3.1.

This should be an extension of the projects WBS value. ProPoc will generate default WBS specifiers for new tasks if a WBS specifier was defined for the project.

(P) HyperPoc link:

Hotlink to a HyperPoc card. Please see the chapter on HyperPoc.

Lead and lag:

The lead value defines the number of idle workdays that must precede a task after all prerequisites had been completed.

The lag value defines the number of idle workdays that must follow a task before any depending task can commence work.

No resources are allocated during the lead and lag days.

You can specify negative values for lead and lag. The lead/lag field accepts arithmetic expressions.

☞ *Additional lead/lag days can be defined for individual links between tasks.*

Constraint:

- $S \geq$ Start No Earlier Than (SNET)
The task will not start before the Target Date
- $->$ As Late As Possible (ALAP)
The task is positioned as late as possible.
The task should be a prerequisite to other tasks.
- $S =$ Must Start On (MSO)
The task must start on the Target Date.
- $<<-$ As Soon As Possible (ASAP)
The task is positioned as early as possible.
- $F \geq$ Finish No Earlier Than (FNET)
The task will not finish before the Target Date.
- $S < =$ Start No Later Than (SNLT)
The task will not start later than the Target Date.
- $F =$ Must Finish On (MFO)
The task must finish on Target Date.
- $E < =$ Finish No Later Than (FNLT)
The task finishes no later than the Target Date.

In some cases ProPoc may be forced to violate the specified target date. Optionally a warning can be given during reordering if that happens (*Preferences-Mode*).

(P) To list all task that violated constraints invoke table mode and specify an appropriate filter (*Preferences-View*)

Default constraints:

- Activities: Start No Earlier Than (ASAP)
- (P) Subprojects: Must Start On (MSO)
- Milestones: Start No Later Than (SNLT)

Target date:

Specify the target date for the constraints that require a target date.

Duration:

Duration of an activity in workdays, (P) work hours, or work minutes.

(P)The duration of subprojects is derived from the subproject file.

Status:

The percentage of completion for an activity: 0-100%.

(P) The status of subprojects is derived from the subproject file.

As long as at least one prerequisite is not closed (100%) the status of an activity will stay at 0%!

Closed activities are displayed as a broken line, they do not have float days, disappear from the critical path list and from the resource schedule, and do not generate alarms. However, they still keep their resources allocated.

Closed and partially closed activities are frozen: Their start date will not change during recalculation.

Cost:

Defines the fix cost per activity, e.g. setup costs. Use negative numbers for earnings.

(P) The fix costs of subprojects are derived from the subproject file.

Fix costs are independent from resource utilisation. Depending on the setting in *Preferences-Mode* they are applied always, or to any activity with a status > 0%.

Budget:

The amount of money allowed for this activity. Use negative numbers for planned earnings.

(P) The budget of subprojects is derived from the subproject file

Workload:

In ProPoc workloads for resources are specified in percent (0-100) of the total resource capacity. The work load is specified for activities only.

(P) For subprojects it is retrieved from the subproject file.

The workload influences the scheduling of tasks as ProPoc tries to resolve resource conflicts. A resource conflict is given when the workload of a resource would exceed the maximum resource availability (normally 100%). The workload also influences the cost of an activity.

Priority:

The priority setting can be used to influence the resolution of resource conflicts. A task with a high priority will win over a task with a low priority. 1 is high, 99 is low.

The task priority setting is only used to resolve resource conflicts within the same project. Resource conflicts between projects are solved by the project rank.

Scheduling:

Duration driven (Fix duration)

The actual duration of an activity is determined by its duration setting. The workload on the resource is determined by the specified workload percentage and will be applied over the whole duration. When resource overload occurs the activity is postponed.

Effort driven

The activity lasts no longer than the specified duration. When resource overload occurs the activity is postponed. When resource underload occurs the activity increases its load on the resource and reduces the actual duration, i.e. the activity will finish earlier.

Example:

An activity with 10 days duration and 50% resource load and no competition from other activities will actually last only 5 days and will use 100% of the resource.

☞ (P) Subprojects are always scheduled duration driven (fix duration).

1.4.2 Calculated attributes

Links:

List of prerequisite tasks.

Each displayed link can contain a link qualifier like ":SS+3"

SS = start to start

FS = finish to start

A numeric values specifies the lag days.

No qualifier is displayed for the default of FS+0

Links between tasks are created using the *Link-function* in Detail mode.

required by:

List of tasks depending on the current task. Link qualifiers are shown as above.

Duration:

Computed start date and end date of an activity or subproject.

Target / Start Date:

For a milestone the target date and the actual date is displayed. If these dates are later than the current date, the distance from the current date is shown in workdays (work hours, work minutes) in parenthesis.

Slack:

Amount of workdays (work hours, work minutes), the task is allowed to float without influencing the end date of the project or violating a constraint date.

Tasks with a higher priority or tasks in other projects with a higher rank can influence the slack of a task when they compete for the same resources.

A task with a slack ≤ 0 is called critical.

A negative slack indicates a constraint violation: The task is overdue!

For a closed task no slack days but "closed" is displayed.

Costs:

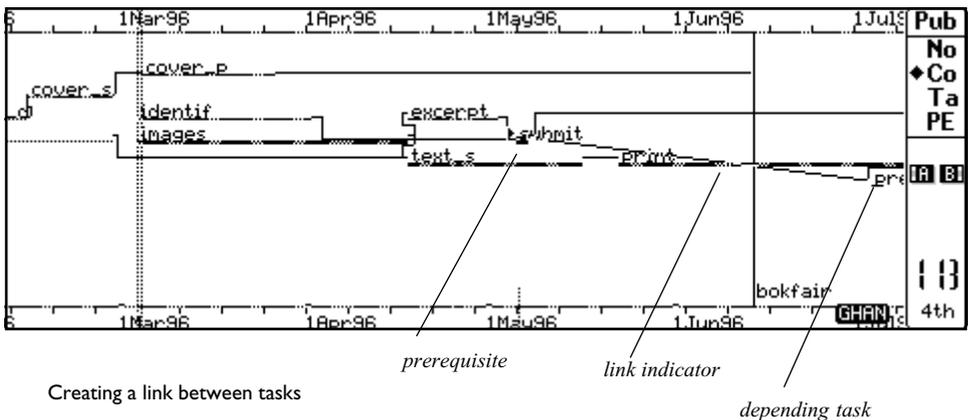
For activities and subprojects the sum of fix costs plus resource costs is displayed. The budget is displayed behind the costs for comparison.

For milestones the accumulated project costs up to the actual date of the milestone is displayed. This includes the costs of all activities and subprojects that have been completed until that date.

1.4 Links

	Menu	Key
Define link.	Link-Link	PSION-L
Undo or modify link	Link-Undo	PSION-U
Go to prerequisite	Link-Goto_link	PSION-K
Go to depending task	Link-Goto_dependent	PSION-B
(3a) Show/Hide link	Link-Show/Hide link	Shift-PSION-L

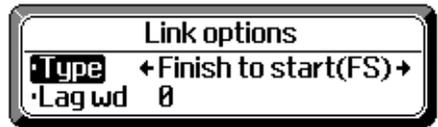
In ProPoc links between task are created interactively. The *Link function* (PSION-L) starts the link mode. Simply navigate to the prerequisite task. You can use all navigation tools while in the link mode including the *scan*, *jump* and *goto* functions.



To confirm a link press the ENTER key, to abort press ESC.

After you have confirmed a link, a dialogue box pops up to define the link options. Select Finish to start (FS) or Start to Start (SS). If the prerequisite should be a milestone this selection is meaningless and is therefore not presented. The default is FS.

Specify a lag value in workdays (work hours/minutes). You can also specify negative values. The default is 0.



The link-lag-value adds with the lag value of the prerequisite and with the lead value of the depending task.

The maximum number of prerequisites per task varies. If only standard links are used a maximum of 16 applies, if all links have special options a maximum of 4 applies.

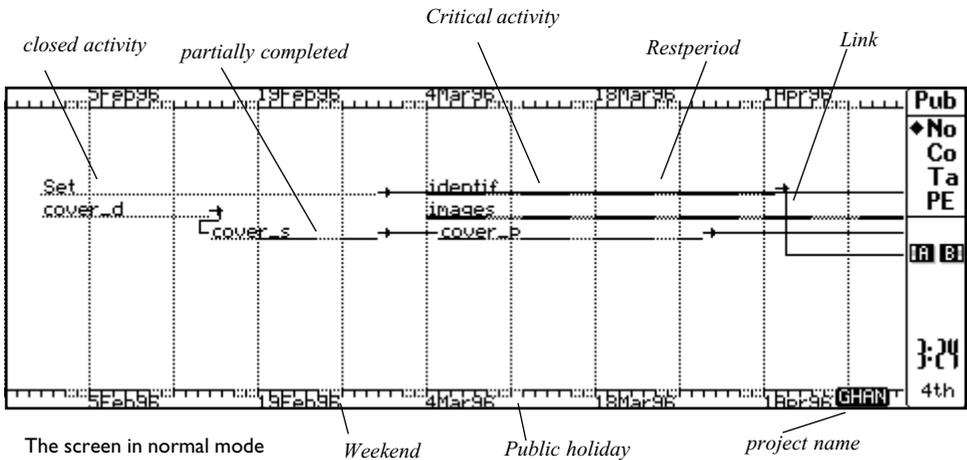
(P) To create links between projects use the *Link* function in Outline mode. Only standard links can be used between projects.

To remove or modify a link, use the *Unlink*-function.

2 The User Interface

2.1 The main screen

2.1.1 Graphic mode



In graphic mode the screen displays a calendar. Items are shown with their true duration. There are two flavours of graphic mode: normal and condensed. In normal mode each day is one character wide. In condensed mode each day is only 3 pixels wide (2 pixels on S3). Note, that you can change the character size using the *Zoom* function.

The project name is found in the bottom right corner of the screen.

Activities and subprojects are displayed as horizontal lines, if critical as bold lines. The name of the activity is found below the line. If an activity is closed the line is grey. Restdays are also displayed grey.

Milestones are displayed as vertical lines. The name is printed at the bottom.

- grey if uncritical (slack is > 0)
- black if critical (slack = 0)
- bold if overdue. (slack < 0).

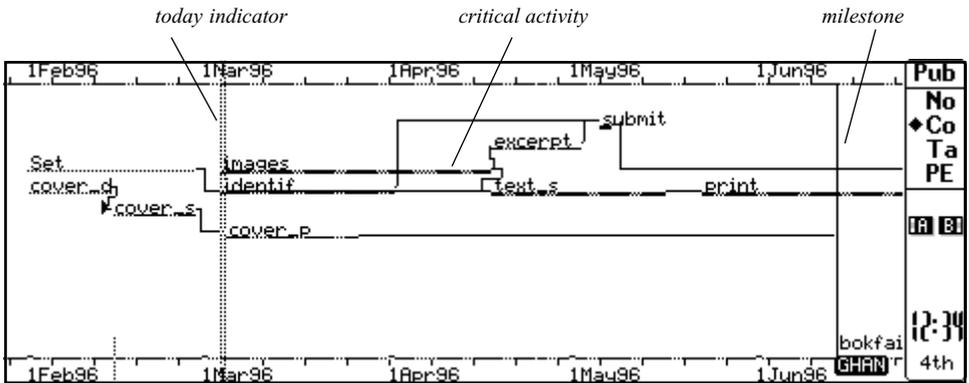
A grey line horizontal line to indicates the amount of delay.

Links are displayed optionally.

A calendar ruler is displayed at the top and bottom of the screen. Saturdays and Sundays are marked with a dash while restdays are displayed grey.

Week starts are marked in the calendar ruler. An optional grid is provided to identify weeks more easily.

The current date is displayed as a pair of grey vertical lines.



The screen in condensed mode

Use the *Zoom* functions to view the graphical screen in different magnifications. Other options are controlled through the *Preferences-View* function.

2.1.2 Table mode

Table mode is best suited for an overview over task attributes and for mass modification. It lists all tasks within a project ((P) in Outline mode all projects). As you move with the cursor across the fields, modifiable fields will be highlighted. To edit a modifiable field, press Enter. A dialogue box with the field value will pop up.

	Pri/Mod	Constraint	Lead	Lag	Duration	Status	Pub
cover_d	22 dur	<<-	0	0	10wd	100%	1 No
Set	28 dur	S>=1Feb96	0	0	20wd	100%	1 Co
cover_s	22 dur	<<-	0	0	10wd	0%	15 Ta
images	32 dur	S>=2Mar96	0	0	30wd	0%	4 PE
identif	1 dur	S>=3Mar96	0	0	20wd	0%	4
cover_p	25 dur	<<-	3	4	15wd	0%	5 IR BI
text_s	28 dur	<<-	0	0	20wd	0%	18
excerpt	22 dur	S>=3Mar96	0	0	10wd	0%	18
submit	7 dur	->>	0	60	2wd	0%	6
print	34 dur	<<-	4	4	35wd	0%	23
bokfair	---	S= 14Jun96	0	0	---	open	14
preview	1 dur	<<-	0	0	2wd	0%	4 GHRN 26th

The screen in table mode

	TotalCost	Budget	Resource1	Pub
cover_d	350	500	myself	10% No
Set	1800	2000	myself	30% Co
cover_s	0	800	myself	3% Ta
images	0	3000	myself	30% PE
identif	0	0	alison	5%
cover_p	0	0		IR BI
text_s	0	6500	myself	5%
excerpt	0	0	myself	20%
submit	0	100	myself	50%
print	0	11000	myself	5%
bokfair	2150	---		23
preview	0	200	myself	40% GHRN 26th

Displaying right part of table

	Pri/Mod	Constraint	Lead	Lag	Duration	Status	Pub
cover_d	22	dur <<-	0	0	10wd	100%	1 No
Set	28	dur S>=1Feb96	0	0	20wd	100%	1 Co
cover_s	22	dur <<-	0	0	10wd	0%	15 Ta
images	32	dur S>=2Mar96	0	0	30wd	0%	4 PE
identif	1	dur S>=3Mar96	0	0	20wd	0%	4
cover_p	25	dur <<-	3	4	15wd	0%	5
text_s	28	dur <<-	0	0	20wd	0%	18
excerpt	22	dur S>=3Mar96	0	0	10wd	0%	18
submit	7	dur ->>	0	60	2wd	0%	6
print	34	dur <<-	4	4	35wd	0%	23
bokfair	---	S= 14Jun96	0	0	---	open	14
preview	1	dur <<-	0	0	2wd	0%	4 26th

Selecting an editable field

	Pri/Mod	Constraint	Lead	Lag	Duration	Status	Pub
cover_d	22	dur <<-	0	0	10wd	100%	1 No
Set	28	dur S>=1Feb96	0	0	20wd	100%	1 Co
cover_s	22	dur <<-	0	0	10wd	0%	15 Ta
images	32	dur S>=2Mar96	0	0	30wd	0%	4 PE
identif	1	dur S>=3Mar96	0	0	20wd	0%	4
cover_p	25	dur <<-	3	4	15wd	0%	5
text_s	28	dur <<-	0	0	20wd	0%	18
excerpt	22	dur S>=3Mar96	0	0	10wd	0%	18
submit	7	dur ->>	0	60	2wd	0%	6
print	34	dur <<-	4	4	35wd	0%	23
bokfair	---	S= 14Jun96	0	0	---	open	14
preview	1	dur <<-	0	0	2wd	0%	4 26th

Constraint images

Constraint + Start No Earlier Than +

Target date 02/03/1996

Editing a field

Item name

The set of attributes shown can be customised (*Preferences-Table*).

(P) You can restrict the set of displayed tasks by applying a filter. While in table mode go to *Preferences-View* and make your choices under "Show" and "but only".

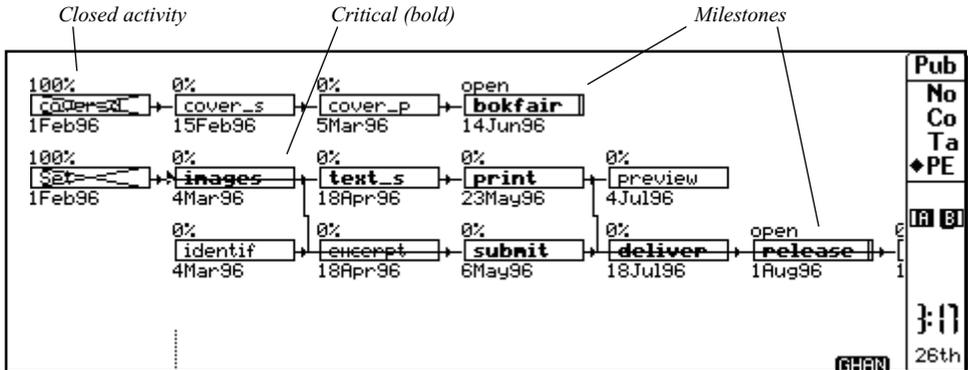
Milestones are displayed underlined.

Critical tasks are displayed with the name set in bold.

You can define links interactively in table mode, too.

2.1.3 PERT mode

PERT mode is best used to get an overview over the project structure. It displays tasks as boxes and optionally links between them. In addition each box can show two attributes for each task. To select the attributes to be displayed go to *Preferences-View* while in PERT mode and select the appropriate attributes for "PERT display 1" and "PERT display 2".



PERT mode, displaying status and start date

2.1.4 Navigation

- Cursor keys move the cursor to tasks left or right or above/below the current task. The PSION key accelerates. If the Shift key is pressed in addition, the cursor will move to the very first/last task. The CAPS key will restrict the cursor movement to critical tasks.
- Cursor keys in combination with the CONTROL-key will scroll the screen without changing the actual cursor position.
- Any alpha key will move the cursor to the next task with a name starting with that letter (selective browsing). This function works "wrap around". It restarts at the project begin when the end was reached.
- TAB or Shift/TAB flips through projects.
(P) CONTROL-TAB switches between Detail mode and Outline mode.
- Use the functions of the Scan title to search for specific tasks.
- Use the "GoTo"-functions of the Link title to navigate to linked tasks.

2.1.5 Key Short-cuts

ESC	abort an operation
DELETE	Cut a task (Copy to clipboard and Delete)
Shift-DELETE	Delete a task (without copying to clipboard)
TAB	Toggle projects through ranks 1..15
CAPS-TAB	Toggle resources in resource schedule.
Shift-TAB	Toggle projects through ranks 15..1
CAPS-Shift-TAB	Toggle resources in resource schedule in opposite direction.
CONTROL-TAB	(P) Toggle between Outline and Detail mode
PSION-TAB	(P) Toggle between ProPoc and HyperPoc
Alpha key	Browse through tasks beginning with that letter
ENTER	Edit current task or current field
Shift-ENTER	Edit associated document
MENU	Display menu
Diamond	Toggle display modes: normal, condensed, table, PERT
Shift-Diamond	Toggle display modes in opposite direction.
Shift-MENU	Same as diamond (S3 only)
Control-MENU	Toggle Status window
HELP	Display help screen
Control-HELP	Display help index
Cursor keys	Navigate between tasks
PSION-cursor key	Fast navigate or fast scroll
PSION-Shift-cursor key	Home or End
Control-cursor key	Scroll screen without moving cursor
CAPS-cursor key	Navigate to critical tasks only.
Contrast keys (, .)	Decrease/Increase duration in graphic mode

2.2 Split screens

2.2.1 Resource schedule

When you invoke the resource schedule while in graphic mode, you have the possibility to display the resource schedule as a graph. The resource utilisation will be shown as a bar graph below the task calendar. As you navigate through the tasks or scroll the screen, the resource graph will be scrolled accordingly.

If the "all projects" option was chosen, a white line separates the utilisation by the current project (top) from the utilisation by the other projects (bottom).

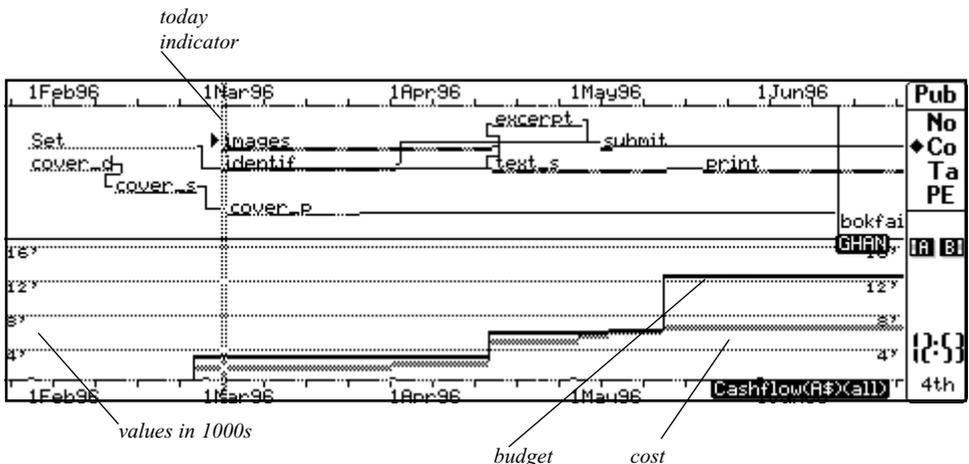
Restdays, holidays, and times of resource unavailability are greyed out.

To return to the full screen, press ESC.

2.2.2 Cashflow analysis (P)

When you invoke the Cashflow analysis function while in graphic mode, you have the possibility to display the cash flow as a graph. The accumulated costs will be shown as a grey line below the task calendar. The budget is represented as a black line. As you navigate through the tasks or scroll the screen, the cash flow graph will be scrolled accordingly.

To return to the full screen, press ENTER.



Cashflow analysis, condensed mode

2.3 Report boxes

Several functions display results in a special screen, a report box. Navigation is similar in all of these boxes and some output functions can be used for all boxes:

Use the up/down cursor keys to scroll and to move from task to task. The PSION key accelerates. Arrows on the right hand side of the box indicate if there is data above the first line or below the last line.

Leave a report box by pressing ESC or ENTER. If you press ESC the main screen cursor will stay at its original position. If you press ENTER, the cursor will jump to that task or date that had the cursor in the report box.

You can also invoke a function (like Edit) to be applied immediately to a certain task.

You can print a report by applying the Print function to a report box.

(P) You can output a report to spreadsheet by applying the Save-As function to a report box. If you choose "SPR with graphics" ProPoc will automatically create a graphic in a format that is best suited for that report.

2.3.1 Resource schedule

The resource schedule can be evaluated for the current project or all projects. ProPoc will display the resource utilisation task by task. Include or exclude closed tasks. (P) Include or exclude resource calendar exceptions.

You can restrict the display of events to a specified time window. In a summary line ProPoc displays the average resource utilisation for that time window.

Use *Zoom* function to narrow or widen the time window (day, week, month, year, whole project). Use the left/right cursor key or PSION-R/PSION-G to move the time window one day/week/month/year to the left or to the right.

Use TAB or Shift-TAB to switch the report to another resource.

2.3.2 Cumulated resource schedule

As above, but the resource utilisation is not displayed task by task but cumulated over time.

2.3.3 (P) Quick schedule

The same as resource schedule, but with the following parameters preset:

- Schedule type: Task list
- Projects: all
- Closed tasks: no
- Resource calendar exceptions: no
- time frame: today

This function provides a quick way to generate a resource schedule for today's tasks.

2.3.3 (P) Cashflow analysis

The cash flow can be evaluated for the current project or all projects. The costs/earnings can be applied at the begin of a task, at the middle of a task, at the end of a task or 7, 14, 30, 60, 90, 180 days after the end of a task.

The report can be limited for events that lie in a specified time window. In a summary line ProPoc displays the total change in cash between the beginning and end of that interval.

Use the *Zoom* function to narrow or widen that time window (day, week, month, year, whole project).

Use the left/right cursor key or PSION-R/PSION-G to move the time window one day/week/month/year to the left or to the right.

Note, that earnings are defined as negative costs.

In Detail mode the budget figure is derived from task budgets.

In Outline mode the budget figure is derived from project budgets.

2.3.4 (P) Review baseline

The current state of the project file is compared with a previously generated baseline (Set Baseline). ProPoc can store up to 4 different baselines that are identified with date and time of their creation.

Select one of the stored baselines (not required if only one baseline is stored). ProPoc will display the development of task start, task end, task fix cost, task resource cost, and task total cost for each task of the current project.

When this function is invoked in Outline mode, ProPoc will display the development of start, end, and total cost for each project.

2.3.5 (P) Bottleneck analysis

ProPoc tests the influence of each resource by disabling the resource, reordering the whole file, then comparing the results with the previous values.

The resulting box shows how many workdays the completion of the current task, the current project, and the whole file is delayed by each resource. This list can be used to identify resources that should be increased in capacity.

In Outline mode only the values for the current project and the whole file are displayed.

2.4 Definition boxes

Definition boxes are used to allow quick modification of a larger set of entries. Definition boxes can be scrolled just as Report boxes.

Use the up/down cursor keys to scroll and move from line to line. The PSION key accelerates. Arrows on the right hand side of the box indicate if there is data above the first line or below the last line.

In addition definition boxes allow the modification of entry lines by pressing the TAB key. Each definition box has its own menu that can be accessed with the MENU key.



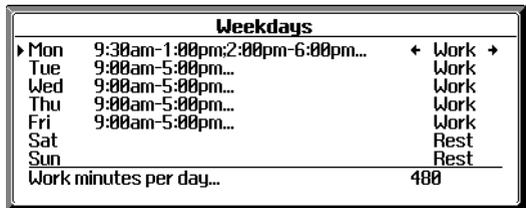
Invoking a definition box menu

To accept the changes, press Enter. To discard the changes made press ESC.

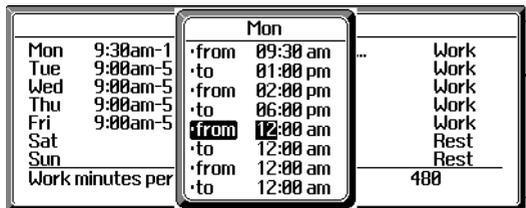
2.4.1 Weekday

Used to define the workdays of a week (Preferences-Weekdays). Position the cursor to the day you want to modify.

- Switch from *Work* to *Rest* by pressing the left/right cursor keys or by typing W or R.
- (P) For files with the time unit set to hours/minutes, press TAB to change the definition of each day in detail.
- To change the work minutes per day, position to the last line and press TAB.



Week definition in hour based file



Defining a day scheme

2.4.2 Global public holidays

Position the cursor to the holiday.

- Switch between *Always*, *Custom*, *Never* by pressing the left/right cursor keys or by typing A, C, N.
- To change the algorithm of a holiday press TAB.
- To create a new holiday position the cursor to a line that is marked as free and press TAB.
- To remove a holiday definition, press DEL.

2.4.3 Custom public holidays

Used to define the public holidays that were set to custom (Preferences-Public holidays).

Position the cursor to the holiday you want to set.

- Switch from *Work* to *Rest* by pressing the left/right cursor keys or by typing W or R.

Custom public holidays		
1	EasterSaturday	Work
2	EasterTuesday	Work
▶ 3	ChristmasDay	+ Rest +
4	QueensBirthday	Rest
5	AboriginesDay	Work
6	MelbourneCup	Rest
7	ProclamationDay	Work

Setting custom holidays

2.4.4 Calendar exceptions

(Preferences-Exceptions).

- Position the cursor to the exception you want to modify and press TAB.
- To create a new exception at the cursor position, use the *Insert* function. (PSION-I).
- To append a new exception, press the TAB key on an empty line.
- To delete an exception, press the DEL key.

Calendar Exceptions	
Nothing found	
Exception 1/0	
Start date	04/03/1996
End date	04/03/1996
Mode	Rest

Current exception
Total number of exceptions

Setting calendar exceptions

2.4.5 Resources

Used to define a files resources (*Resource-Define*).

- To modify a resource, position the cursor to the resource and press TAB.
- To create a new resource, move the cursor to a line marked as free and press TAB.
- To delete a resource, press DEL.

Resources	
1	myself(1/f)...
2	alison(1/f)...
▶ 3	ken pryse(4/f)...
4	(free)
5	(free)
6	(free)
7	(free)
8	(free)
9	(free)

flexible mode

Capacity

Resource definition

2.4.6 (P) Resource calendar

Used to define individual calendars for each resource (*Resource-Calendar*).

- Position the cursor to the calendar entry you want to modify and press TAB.
- To create a new entry at the cursor position, use the *Insert* function (PSION-I).
- To append a new entry, press the TAB key on an empty line.
- To delete an entry, press the DEL key.
- To generate resource calendar entries from the PSION-Agenda, use the *Load Agenda* function (PSION-A) (see the chapter about the Agenda-Link)
- To switch through the calendars of other resources, press CAPS-TAB or CAPS-Shift-TAB.

Calendar		
myself		
▶	10Oct96	31Oct96
		0%

Availability

Resource calendar

2.4.7 Table definition

Define individual tables for screen table mode, printing to a printer, printing into a ASCII text file, and printing into a WORD file.

(P) When you invoke this function in Outline mode, you will edit a separate set of tables to control the table layout for Outline mode.

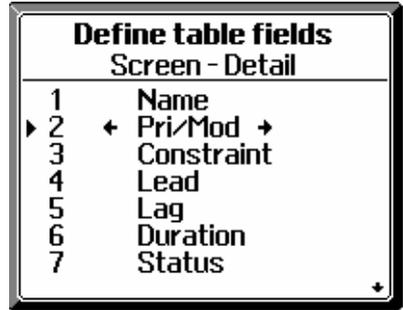
- To modify a table entry, position the cursor to that entry and use the left/right cursor keys to scroll through the possible choices. You can also use an alpha key to position to matching choices.
- Press TAB to use a pop up dialogue box to make your choices. If you press TAB again, you will see a list of all possible choices.
- To delete an entry, use the DEL key.
- To insert a new entry, use the *Insert* function (PSION-I).
- To append a new entry, use the TAB key in an empty line.

Use the *Reset to default* function to abandon any customising and to return to the original ProPoc default settings.

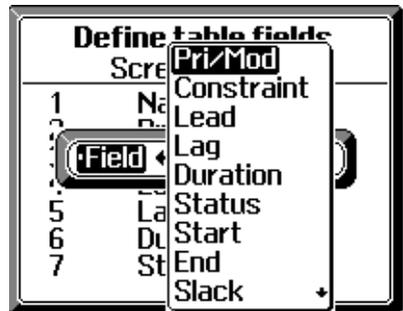
☞ *The very first entry is Name. This entry cannot be modified or deleted.*

A maximum of 16 columns can be defined.

☞ *When customizing a table for output to WORD, please note that WORD cannot handle more than 9 columns (8 tabs). ProPoc gives a warning if more than 8 tabs would be used for this table (The resource column needs 2 tabs).*



Setting up a table



Selecting column header

2.5 Entering date and time

Entering date and time in ProPoc is similar to other PSION applications. In any date field you can press the TAB key to invoke a pop up calendar.

If you enter intervals without time specification, remember that the end date is inclusive: The interval 12Feb1996-14Feb1996 is three days long (includes 14Feb).

(P) For intervals with time specification the end time is exclusive: The interval 12Feb1996 6:00pm - 13Feb1996 0:00 am lasts exactly until midnight (excludes the first minute of 13Feb).



Using the pop up calendar to enter a date.

3 ProPoc and the rest of the world

ProPoc can interface with many other PSION applications, and via the MPX interface even with third party project management applications on a PC or Macintosh.

3.1 System settings that control ProPoc

The following system settings determine the operation of ProPoc:

- week start as defined in CLOCK is used as week start in ProPoc.
- rest days as defined in CLOCK are used as default for the rest day definition in ProPoc.
- the system date format determines the date format in ProPoc.
- the system currency setting is used as default currency in ProPoc.
- the system printer setup will influence the printing functions.

3.2 Printing in ProPoc

In ProPoc you can print to printers, into ASCII text files, and into WORD files.

Each output medium has its own advantages:

- Printers deliver immediate output on paper.
With most printers ProPoc can print even graphics.
Before printing to a printer, use *Printer Setup* to configure the printer and to define the margins. The margins apply to the A4 paper format.
- ASCII text files are the most portable form of output and can be easily e-mailed.
The generated file is stored by default in the \WRD\ folder on the internal disc and has the extension .TXT .
- WORD files have additional style information, and it is possible (P) to merge associated documents into the main document.
The generated file is stored by default in the \WRD\ folder on the internal disc and has the extension .WRD .

3.1.1 Printing from the main screen

Printing from the main screen will produce an overview over the whole project or the whole file. You may restrict the output to tasks falling into a specified time window.

Select one of the following output modi:

- Table. A paragraph containing the project data, followed by table of tasks. You can customize the table layout via *Preferences-Table* definition.
- Full report list. For each project a task a full paragraph is printed.
- Diagram. A calendar view diagram of the current project or all projects is printed.

If you output to a printer that is capable to print bitmap graphics and you are in graphic mode, ProPoc will generate bitmap graphics very similar to those on the screen. Otherwise, ProPoc will use a semigraphical approach.

☞ *Printing can take a while. You can print in the background. ProPoc will give a short beep when finished.*

3.1.2 Printing from a report box

ProPoc will print the current report in list form on the chosen output medium. In some cases you can have task descriptions optionally printed with each task.

3.3 ProPoc and WORD

It is possible to attach a WORD document to each ProPoc task and project. This is called an *associated document*. Associated documents can be created, modified and viewed by pressing Shift-ENTER on a certain task (or a certain project in (P) Outline mode). When the cursor is placed on a task with an associated document its form changes from triangle to rectangle.

ProPoc can print into WORD files. (P) After the printing is finished, ProPoc asks you if you want merge associated documents into the main document and if you want to invoke WORD to view the output. You can than make modification or print the document then.

☞ *Remember, that WORD can only handle 8 tabs which limits the number of columns in tables.*

3.4 (P) ProPoc and HyperPoc

HyperPoc is a hypertext application for PSION S3/S3a. Multimedia information is stored in form of cards which can be hotlinked to each other.

It is possible to hotlink HyperPoc cards to ProPoc items similar as to associated documents. By using the hypertext and multimedia capabilities of HyperPoc there are virtually no limits for project documentation.

To create a link to a HyperPoc-card:

Invoke the *Edit task* function or *Modify project* function.

Position the cursor to the description field and press ENTER.

A new dialogue box appears to enter WBS, description and the HyperPoc hotlink.

☞ *The HyperPoc hotlink is not shown if there is no HyperPoc stack found.*

If no hotlink was defined yet, (none) is shown. Press the MENU key to create a new hotlink:

- If HyperPoc is active in the background, ProPoc will propose the current HyperPoc card as hotlink. The *Stack* field will show the name of the current HyperPoc stack, and the *Card number* field will show the number of the current card.
- If HyperPoc is not active, ProPoc will display an existing HyperPoc stack in the *Stack* field and will display 0 for the card number. Modify these fields to your requirements.

To remove a hotlink, press MENU again.

To jump to a HyperPoc-card:

Press PSION-TAB while in the main screen. If HyperPoc was not already running it will be invoked. HyperPoc is brought to the foreground and the referenced card is opened. Press PSION-TAB again to return to ProPoc.

To create a backward link from HyperPoc to a ProPoc object:

In HyperPoc create an application link to ProPoc (PSION-L in edit mode). If ProPoc is currently active (in the background), HyperPoc will automatically remember the current cursor position in the ProPoc file. If you later activate this link, ProPoc will be invoked and the cursor will be set to the remembered position.

3.4 Output to the Spreadsheet application (P)

ProPoc can output to spreadsheet applications in two different formats through the *Save As* function. The exported file is stored by default in the \SPR\ folder on the internal disc.

WKS is the most widely understood spreadsheet format - you should choose this format if you plan to output to a third party spreadsheet application on a PC or Mac.

SPR is the format of the PSION spreadsheet application. You should choose this format if you plan to output to the spreadsheet application on your palmtop. This format allows a more sophisticated formatting of data.

When you output from the main screen ProPoc generates a spreadsheet with one row for each task (in Outline mode one row for each project).

When you output from a report box ProPoc generates a spreadsheet with one row for each row in the report box.

When exporting in SPR format you may opt to output with graphics. ProPoc will generate graphics for the resulting spreadsheet. ProPoc will chooses a chart format that best suits the data in the resulting spreadsheet. You may, however, change the chart format later in the spreadsheet application.

☞ *The spreadsheet application cannot print graphics. However, you can use an application like PocView to make a screen hardcopy.*

3.5 Alarms

ProPoc can raise alarms for certain events. The type of alarm events can be defined for each project separately (see Projects). Additional options are available in Preferences.

There are two different alarm handlers: Morpheus and the PSION AGENDA application through (P) Agenda link.

Morpheus is a service application that is delivered with most of our applications. It usually runs silently in the background and only becomes active when the HELP-key is pressed or an alarm is raised.

Both systems have advantages and disadvantages:

Handling alarms through the AGENDA offers a "one stop" information as the events are shown in the agenda. At the other hand, the agenda may become too cluttered by too many ProPoc alarms.

The agenda must be used on a daily basis, too, as the agenda sets only the next alarm. When the alarm goes off and the agenda application was closed, no more alarms will be scheduled.

This does not happen with Morpheus. As long as there are alarms in the alarm file, Morpheus will run as a background task and will pass each alarm to the alarm system. This requires some overhead - about 10k of memory and a small CPU usage.

You can switch between alarm handlers or switch off alarms altogether via *Preferences-Alarms*.

Alarms are only updated when you close a ProPoc file !

3.6 (P) ProPoc and the AGENDA

ProPoc can export alarms to the AGENDA and can import resource calendar entries from the AGENDA.

3.6.1 (P) AGENDA alarms

To select the AGENDA as an alarm handler, go to *Preferences-Alarms,Agenda*. Then select *Agenda* as alarm handler and select an agenda file (usually there is only one).

You can then enter options for sound and formatting.

You also must specify a unique year symbol (letter). The symbol must be unique for each ProPoc file. It will be used to identify entries in the AGENDA for later updating when dates of events have changed.

In the AGENDA, you are allowed to modify generated entries, even to attach notes. You should, however not change the name within the chevrons or change the year symbol.

When ProPoc tries to write to the agenda file, it may have to close the AGENDA application, because it cannot access an open file.

You should then reopen the AGENDA to make it process the new alarm events.

3.6.2 (P) Import of resource calendar exceptions

You can import resource calendar exceptions from an Agenda file. This feature can be useful for the resource "myself", to reflect the unavailability for project work due to meetings, etc.

First set up the Agenda file (same as for alarms) via *Preferences-Alarms*.

Then invoke the Resource Calendar function and select the resource.

In the Resource Calendar definition box, use the *Load Agenda* function.

The following screen lets you define a time window for Agenda-scanning.

The function can work on a

- daily, weekly, or monthly (time unit: days)
- hourly, daily, weekly or monthly (time unit: hours)
- minutely, hourly, daily (time unit: minutes)

interval base and will evaluate the average percentage of availability.

All appointment type entries including the crossed out entries and repeating entries are considered.

The percentage of unavailability is computed from the length of the appointments compared to the amount of "work minutes per day". This value is taken from the *Preferences-Week-days* setting.

☞ If "Minutes" was set no averaging takes place. The availability is either 100% or 0%.

You can update existing calendar entries bearing the mark "A" for Agenda by re-applying the function. You can make entries permanent by editing them - they will lose the Agenda-mark.

When ProPoc tries to read the Agenda file, it may have to close the AGENDA application, because it cannot access an open file.

3.7 (P) The MPX-interface

MPX stands for MicroSoft Project eXchange and is a file format to exchange project data between various project management packages.

The MPX-interface can be used to move a project from ProPoc to MS Project and vice versa. When exporting a project from ProPoc, ProPoc generates optionally MPX V1 or MPX V4 files, so the files are understood from MS Project V1 upwards. When importing a project into ProPoc, ProPoc ignores all fields that are not relevant - so MPX V1 and V4 files are understood.

ProPoc and MS Project have quite different concepts. During a conversion you will usually encounter a series of error messages and the resulting project schedules may differ substantially.

It is particularly not a very good idea to convert the same project file repeatedly back and forth - the content of the file would deteriorate.

Having said all this, the MPX-interface is a very useful tool for integrating personal project data into corporate project data and can save a lot of retyping.

☞ *You can run ProPoc on a PC, too, using the S3a-emulator (freeware).*

MPX conversion can take a while. You can run the conversion in the background. ProPoc will give a short beep when it needs your attention.

3.7.1 Export to MPX-file

Invoke the *Save-As* function and choose MPX. You can opt to export only the current project or all projects in the file.

Then specify a file name for the MPX output. With 3-link active this can be a file name on a remote computer.

Specify the MPX file type: MPX1 or MPX4. The preferred choice is MPX4, but if the importing application does not understand MPX4, select MPX1. MPX1 cannot export fixed task costs.

- ProPoc will export the settings for date format and currency, and the calendar settings. Holidays are exported as calendar exceptions. For very long projects this can result in too many calendar exceptions.
- The resource definitions and the resource calendars are exported.
- Projects are exported as summary tasks. Links between projects cannot be exported.
- Activities, milestones, and subprojects are exported as tasks.

The extension of the name of subproject files is changed to .MPX, so you should convert subproject files as well.

The following calendar attributes are exported:

Calendar name	File specific name (created by ProPoc)
Weekday definitions	
Exceptions	Combined public holidays and calendar exceptions

The following MPX resource attributes are exported:

ID	created by ProPoc
Name	Resource Name
Initials	derived from Resource Name
Max Units	Capacity
Standard Rate	Resource Cost
Overtime Rate	derived from Surcharge
Cost Per Use	Cost Per Use
Accrue At	always "End"
Base Calendar	same as under Calendar
Resource Calendar	

The following ProPoc resource attributes are not exported:

The fract-part of resource capacity (rounded up to integer)
 Flexible workload handling
 Cost options other than "part time"

The following MPX task attributes are exported:

ID	generated by ProPoc
Name	task or project name
WBS	WBS
Outline Level	1 for projects, 2 for tasks
Duration	Duration
Fixed	Yes = duration driven, No = workload driven
Constraint Date	Constraint Date (Start date for projects)
Constraint Type	Constraint Type
Fixed Cost	Fixed Cost (MPX4 only)
Predecessors	Links
Scheduled Finish	actual task or project finish
Early Finish	same
Late Finish	same
Scheduled Start	actual task or project start
Early Start	same
Late Start	same
%Complete	Status
Planned Cost	Budget

Finish1	Finish 1-3 and Start 1-4 are derived from
Finish2	baseline 2-4. If no baseline 4 exists
Finish3	baseline 1-3 is exported.
Start1	
Start2	
Start3	
Priority	derived from Priority (or Rank)
Milestone	YES for milestones
Subproject File	Filename.MPX for subprojects
Text1	Description and HyperPoc hotlink

The following project attributes cannot be exported:

Links between projects, Locations, Alarm settings

The following task attributes cannot be exported for MPX1 format:

Fix costs for activities and subprojects

ProPoc reports on all cases where it cannot export an attribute. (except alarm settings)

3.7.2 Import from MPX-file

To import an MPX-file, select the *File Open* function, navigate to the MPX-file. ProPoc will ask you to specify an output file for the converted result.

Split into multiple projects: If you choose yes, ProPoc will convert summary tasks on level 1 into individual projects (in the same file). However, ProPoc cannot map links across projects.

If you choose no, ProPoc will ignore all summary tasks and will create one single project.

ProPoc will ask you about the time unit to be used: days, hours, minutes.

Use minutes for very short projects (1 or 2 days), hours for projects up to a few weeks, and days for longer projects.

ProPoc will import the currency symbol, the calendars, the resource definitions and calendars, and all tasks except summary tasks (see above).

Calendars are mapped on the default ProPoc calendar. Calendar exceptions are generated where the two calendars do not match. For very long projects this can cause a "Too many calendar exceptions" message, as ProPoc can only handle a maximum of 40 calendar exceptions.

For resources the following MPX attributes are imported:

ID	Name	Max Units
Standard Rate	Overtime Rate	Cost Per Use
Base Calendar		

The following MPX attributes for projects are imported:

ID	Name	WBS
Duration	Fixed	Constraint Date
Constraint Type	Fixed Cost	Predecessors
Scheduled Finish	Scheduled Start	%Complete
Planned Cost	Finish1	Finish2
Finish3	Start1	Start2
Start3	Priority	Milestone
Subproject File	Text1	Outline level
Finish	Start	Baseline finish
Baseline start		

The following attributes are considered to be equivalent:

Start	Scheduled Start
Finish	Scheduled Finish
Baseline start	Start1
Baseline finish	Finish1

The following attributes are modified during import:

duration and lag values are clipped to 999 if greater.

The following attributes are not imported:

Links between tasks in different projects.

4 Function reference

4.1 File title

New file

Psion-N

The current file is closed (and reordered if necessary) and a new file with the specified name is created. A new set of preferences identical to the current preferences of is created.

(P) Specify the time units for the new time. You cannot change the time units later.

- Days: longer projects and projects where a finer resolution is not required.
- Hours: projects with medium length (days to a few weeks)
- Minutes: very short projects (a few days)

You can use any disk for your files, the internal disk, Flash SSD or RAM SSD. We recommend to use the internal disk or a RAM SSD, as ProPoc files are frequently updated when ProPoc is running.

If you use Flash SSD for project files (not recommended) and you plan to reorganise the Flash SSD, it is good practice to copy the ProPoc files to RAM SSD or the internal disk, open them and close them again, before you copy them back to the re-formatted Flash SSD. This will compress the file.

☞ *You can also create a new project file from the system screen. Place the cursor under the ProPoc icon and press PSION-N.*

Open file

Psion-O

The current file is closed (and reordered if necessary) and the file with the specified name is opened. If the file is not found in a ordered state it will be reordered.

Files from ProPoc V1 are automatically converted to V2-format. If the conversion should fail for any reasons, you'll find a backup copy of the original file in the /PROJ/ folder (extension .BAK).

☞ *ProPoc files have the file extension .PJT.*

(P) If you open a file with the extension .MPX, ProPoc will convert the file from MPX format to ProPoc format (see chapter about MPX).

☞ *To quickly open a subproject file, place the cursor on the subproject and press PSION-O.*

Save as

Psion-A

Exports the data of one project or all projects in the current file into a new project file, a (P) spreadsheet-file or an (P) MPX-file.

- Saving as a project file:
the new project file is reordered immediately. All settings in the new project file are the same as in the original file, except that the alarm handler is switched off (*Preferences-Alarm*), and the (P) subproject property is switched on (*Preferences-File links*). This function is a convenient way, to save a single project as a separate file. The original file stays open.
(P) The new file could be imported immediately as a subproject.
- (P) Saving as a spreadsheet:
For export to spreadsheet choose the format that suits you best: .SPR is the PSION proprietary format for the S3a-spreadsheet application. .WKS is understood by most other spreadsheet programs.
"SPR with graphics" generates one or more graphics in addition. The actual graphics format (curve, bars, pie) is chosen by ProPoc depending on the data. In the spreadsheet application the graphics are displayed by pressing the diamond key. You can then change the graphics format to your requirements.
The *Save as* function can also be used to export data from a report box (such as resource schedule, bottleneck analysis, cashflow, etc.) to a spreadsheet file.
- (P) Saving as an MPX-file:
Choose the file name and the format. MPX4 can map more ProPoc task attributes to MPX attributes and is therefore the preferred option. MPX1 is understood by a wider range of software. See also chapter about MPX-import/export.

Print

Psion-P

- prints the current project or all projects as table, full report, or diagram.
The layout of printed tables can be customised with *Preferences-Table*.
- can be used to print a report box such as resource schedule, (P) cashflow analysis, etc.
- printing to a Printer
Check your printer setup and the margins first (PSION-Y).
- printing to an ASCII text file
The target folder is the \WRD\ folder. The file extension is .TXT. The result can be read in and modified with the WORD application.

☞ To do so create an alias (System application-New List) of the WORD application, specifying

extension TXT and type Texteditor. This will switch the WORD application to monospaced text style making table documents and diagrams easier to read.

- printing to a WORD file.
The target folder is the \WRD\ folder. The file extension is .WRD. The result can be read in and modified with the WORD application.

☞ (P) *When printing to a WORD file you may optionally merge associated documents into the main document.*

- Diagrams are tiled into several pages if necessary.

To print a diagram in bitmap form (WYSIWYG), print to a printer other than the *General* printer and switch the screen to graphic mode (normal or condensed) or PERT mode.

To print a diagram in semigraphical mode, print to the *General* printer, to an ASCII or WORD file, or switch the screen to table mode before invoking the *Print* command.

☞ *When printing a diagram to a WORD file you can optionally choose landscape format. Make sure your printer supports this format when printing out of WORD.*

(P) To print an outline diagram, switch to Outline mode before you start printing.

(P) Outline

Psion-Shift-O, CONTROL-TAB

Switches to Outline mode. In Outline mode each project is displayed as one item. The names of the items are written in italic and the label in the bottom right corner of the screen displays OUTLINE.

In outline mode, projects are treated as elementary items. Most of the edit functions for tasks will now work in a similar fashion on projects. The reporting functions will itemize by projects, not by tasks, too.

(P) Detail

Psion-Shift-O, CONTROL-TAB

Switches to Detail mode. In Detail mode each task is displayed as one item. The label in the bottom right corner displays the name of the current project.

(P) Baselines**Psion-Shift-K**

Set a new baseline. ProPoc will save the current state of the file (start and end dates, costs). If there are already baselines stored, you will have the option to delete or overwrite a selected baseline or to add a new baseline. ProPoc can store a maximum of 4 different baselines. Baselines are identified with date and time of creation.

Reorder**Psion-***

Reorder recalculates the project schedule and reconstructs the screen. Use this function if you had switched the Preferences to manual reordering and you want to see the new schedule. This function is ineffective if the current file is already reordered.

If a *Reorder* is necessary, a +/- symbol flashes in the bottom right corner of the screen and some dialogue boxes display a +/- in the title line.

4.2 Resource title

☞ This menu title is not available on the S3. Instead the Resource schedule function is found under the Project title, and the Resource definition is accessed through the Preferences . The hotkeys can be used on S3, though.

Define Resource**Psion-Shift-H**

You can define up to 15 different resources. To create a new resource, press TAB on a field marked with (free). To modify a resource, press TAB on an existing resource entry. To delete a resource, press DEL on an existing resource entry.

You can enter arithmetic expressions in all cost fields.

For details on resources see the chapter on Resources.

(P) Resource Calendar**Psion-Shift-A**

You can define a separate resource calendar for each resource.

Select a resource and then modify existing calendar entries or create new entries.

Each entry specifies a period of increased or decreased resource availability. The availability can range from 0% to 150%. For periods that are not covered by the resource calendar entries the resource is 100% available.

If more than 100% was specified, the overtime surcharge is applied when the resource utilisation actually exceeds 100%.

- To create a new entry at the cursor position, use the *Insert* function.
- To append a new entry, press TAB on an empty line.
- To modify an entry, press TAB on an existing entry.
- To delete an entry, press DEL on an existing entry.
- To switch to another resource press CAPS-TAB or CAPS-Shift-TAB.

Each resource calendar can have up to 36 entries.

To generate resource calendar entries automatically from your S3a-Agenda, select the *Load Agenda* function (for details see the AGENDA chapter).

Resource Schedule

Psion-H

This functions displays the resource utilisation of the selected resource either in graphical form (split screen) or in list form (report box).

☞ *When invoked the function positions to the resource used most by the current task.*

When used in Outline mode, the function displays the average resource workload for each project.

Graphic display:

If necessary the screen will switch to graphic mode.

- The split screen stays active until the ESC key is pressed.
- TAB or Shift-TAB switches the project.
- CAPS-TAB or CAPS-Shift-TAB switches the resource.

If the "all projects" option was chosen, a white line separates the workload from the current project (top) from the workload from the other projects (bottom).

Restdays, holidays, and times of resource unavailability are greyed out.

Report:

Two flavours are available:

- task list shows utilisation for each task.
- cumulated list. shows utilisation over time.

The resulting report boxes can be printed or (P) exported to a spreadsheet (*Save as*).

- Switch the report box output to another resource by pressing TAB or Shift-TAB.
- Narrow or widen the time window by using the *Zoom* function.
- Move the time window by using the left/right cursor keys or PSION-R/PSION-G.
- Press ESC to leave the report box.
- Press ENTER or PSION-J to jump to the current item.
- Press PSION-E to edit the current item.

(P) QuickSchedule

Psion-Shift-Q

This function is designed to give a quick information about immediate tasks.

It is more or less identical to the previous function, but does not prompt for parameters.

Instead it always displays a task list for the most used resource for all projects. It does not display resource holidays or closed tasks. The time window is set to *today*.

You can then use the above hotkeys to flick through resources, or to widen or move the time window to another date.

(P) Bottlenecks

PSION-Shift-B

The *Bottleneck* function starts a bottleneck analysis to find out which resources need to improve performance. It displays the delays in workdays (work hours, minutes) for the current task, project and the whole file.

Press ESC to close the report box. Press Enter or PSION-H to show the resource schedule of the current resource.

☞ Bottleneck analysis can take a while to perform and will result in a report box that can be printed or (P) exported to spreadsheet. Bottleneck analysis can run in the background. ProPoc will give a short beep when it has finished.

If you want to abort bottleneck analysis press ESC. After pressing ESC wait until reordering has finished.

4.3 Project title

Insert

Psion-I

With *Insert* you add new projects, activities, subprojects and milestones to a file. Each file can contain up to 15 projects, 224 activities, and 56 milestones.

The dialogue box that appears will be filled with the contents of the clipboard if appropriate.

You can enter arithmetic expressions into the budget/cost fields and lead/lag fields.

(P) The description line of an edit box can contains Description, WBS, and HyperPoc hotlink.

To define description, WBS and/or HyperPoc hotlink position the cursor to the description line and press Enter. A new edit box for Description, WBS and HyperPoc appears.

To modify constraints either select the new constraint type, or set the cursor to the constraint line and press Enter. A new dialogue box with the constraint type and target date appears.

For projects set *Alarms* to YES for a second dialogue box with the alarm settings.

After a new project was created, ProPoc will invoke the *Insert* function again to create the first activity in the empty project.

Modify project

Psion-M

This function allows you to modify the current project. The edit box is the same as for the *Insert* function.

Remove project

Psion-V

The current project is removed from the project file.

If an associated document exists for this project, it is removed as well.

You have the choice to remove all tasks belonging to that project (with their associated documents), or to transfer those tasks to another project.

Statistics

Psion-S

The calculated attributes of the current project are displayed. If the current project uses resources, a second screen informs about resource utilisation.

(P) Cashflow

Psion-Shift-S

The cumulated costs and budgets of the current project or of all projects are evaluated.

The costs are displayed as a grey line, while the budget is displayed as a black line. Negative values are earnings.

In Detail mode the budget figures are derived from the task budgets. In Outline mode the budget figures are derived from the project budgets.

Graphic display:

- If necessary the screen will switch to graphic mode.
- The split screen stays active until the ESC key is pressed.
- TAB or Shift-TAB switches the project.
- The ruler abbreviates Thousands with a quote, Millions with a double quote.

Report:

- The resulting report boxes can be printed or saved as a spreadsheet.
 - The summary line shows the change of cash during the specified time window.
 - Narrow or widen the time window using the *Zoom* function.
 - Move the time window by using the left/right cursor keys or PSION-R/PSION-G.
 - Press ESC to close the report box. Enter or PSION-J jumps to the selected date.
-

(P) Review baseline

Psion-Shift-V

Review baseline compares the current content of the project file with a previously saved content. If there are two or more baselines stored you will be asked to select a baseline for comparison. Baselines are identified by date and time of their creation.

In Detail mode the function compares start date, end date, fix costs, resource costs, and total costs of the tasks of the current project. The differences are presented in a report box.

In Outline mode the function compares start date , end date, and total costs of all projects.

You can print the results or export them to spreadsheet (*Save as*).

- ESC closes the report box.
- Enter or PSION-J jumps to the selected item.
- PSION-E edits the selected item.

Switch project

Psion-T, TAB/Shift-TAB

Switches the main screen to another project.

4.4 Task title

Edit task

Psion-E, Enter

Modify the attributes of the current task.

The lead/lag field contains two separate values for lead and lag, separated by a comma. Note that extra lag values can be defined for each link.

You can enter arithmetic expression for lead, lag, costs, and budget.

To edit the target date for a constraint place the cursor on the constraint line and press ENTER. If the selected constraint requires a target date, a new dialogue box for constraint and target date pops up.

☞ S3 only: The cost/budget field contains two separate values for cost and budget, separated by a comma.

- (P) The description line of a project edit box can contain Description, WBS, and HyperPoc hotlink. To define description, WBS and/or HyperPoc hotlink position the cursor to the description line and press Enter. A new edit box for Description, WBS and HyperPoc appears.

If resources are defined, the main dialogue box is followed by a dialogue box for the definition of resource workload.

- (P) In Outline mode this menu item will invoke the *Modify Project* function instead.

Copy task**Psion-C**

Copies the current task and its associated document to the clipboard.

Cut task**DEL**

Moves the current task and its associated document to the clipboard. If other tasks depend on the current task and the task has prerequisites you will have the option to establish new links between depending tasks and prerequisites.

Delete task**Shift-DEL**

Deletes the current task and its associated document. If other tasks depend on the current task and the task has prerequisites you will have the option to establish new links between depending tasks and prerequisites. The clipboard is not modified.

(P) Repeat task**Psion-Shift-R**

Repeats the current task. Select the number of repetitions, the type (minutely, hourly, daily, weekly, or monthly) and the interval (1-999).

Example:

*Repetitions 3, Type weekly, Interval 2
will repeat the task 3 times every two weeks.*

If you repeat monthly and the start date is in the last week of the month, ProPoc will repeat relative to the month end instead of the begin of the month.

Optionally, ProPoc can create links between the repeated tasks.

☞ The copies become individual tasks that are independent from any later changes made to the original task.

Show Info

Psion-W, Spacebar

Displays the calculated attributes of a task.

(P) In Outline mode this menu title invokes the *Project Statistics*.

Associated document

Psion-+, Shift-ENTER

This function invokes the PSION WORD processor and opens an existing associated document, or creates a new one. You can use all features of WORD to process the document - including printing. When you leave the word processor with PSION-X, you will return to ProPoc.

(P) In Outline mode this function accesses the associated document of the current project.

(P) You can merge associated documents into the main document when printing to a WORD file.

☞ *Each single word document uses at least 700 byte of disk space.*

Remove document

Psion--

The associated document of the current item is deleted.

(P) In Outline mode this function removes the associated document of the current project.

4.5 Link title

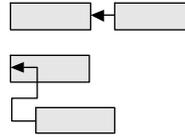
Link

Psion-L

Navigate to the prerequisite task. You can use all navigation tools while in the link mode including the *Scan*, *Jump* and *GoTo* functions.

To confirm a link press the ENTER key, to abort press ESC. ProPoc will not allow cyclic links.

After you have confirmed a link, a dialogue box pops up to define the link options. Select Finish to Start (FS) or Start to Start (SS).



Finish to Start

Start to Start

Specify a lag value in workdays. You can also specify negative lag values.

Unlink

Psion-U

This functions allows to remove a link or to modify the options of a link.

First a list of prerequisites of the current task is displayed. Select a prerequisite and press ENTER.

A dialogue box appears that displays the link options. Press ENTER to modify the options, or press the DEL key to delete the link.

Go to prerequisite

Psion-K

The cursor jumps to the selected prerequisite.

Go to depending

Psion-B

A list of depending tasks is displayed. The cursor jumps to the selected task.

Show links

Psion-Shift-L

Draws the links between tasks.

Each mode (Normal, Condensed, PERT) has its own Show/Hide status.

This function is not available in table mode.

☞ The menu item is not available on S3. Instead use the Preferences to hide the links. The hotkey can be used on S3, though.

Hide links**Psion-Shift-L**

Hides the links between tasks.

☞ The menu item is not available on S3. Instead use the Preferences to hide the links. The hotkey can be used on S3, though.

4.6 Scan title

Find**Psion-F**

Search for a task by its name, its description, the name of a prerequisite, or the name of a resource the task uses. The search can be executed in the current project only or in all projects.

The cursor will jump to the first task where the search string matches.

(P) In Outline mode, you can search a project by its name, its description, the name of a prerequisite project, or the name of a resource that is used in the project.

The cursor will jump to the first project where the search string matches.

Find next**Psion-G**

The search is continued with the same search criteria and the cursor jumps to the next task (or project) where the search string matches.

In the resource schedule and (P) QuickSchedule this function can be used to advance the time window.

Find previous**Psion-R**

The search is continued in opposite direction with the same search criteria and the cursor jumps to the next task (or project) where the search string matches.

In the resource schedule and (P) QuickSchedule this function can be used to move the time window backwards.

Jump to date**Psion-J**

The cursor jumps to the task (or project) that is closest to the specified date, if "Set Cursor" was selected. Otherwise only the screen is positioned to the specified date while the cursor stays at its original position.

4.7 Special title

About**Psion-/**

Displays the banner with the copyright message and registration information. When the *About* screen is active, press the ENTER key to enter your name and the registration number. Any other key closes the *About* box.

Informs also about the number of projects in the file

4.7.1 Preferences

Psion-Q**Calendar - Weekdays****(Psion-Q-Psion-W)**

(P) Specify the number of work minutes for a normal workday. The default is 480 min. This value is used for the *Load Agenda* function, and for MPX import/export.

Specify for each day of the week which day is a workday and which day is a restday. The default is taken from the system settings (CLOCK application).

(P) For minute or hour based files, press TAB to define a time scheme for each workday.

Calendar - Public holidays**(Psion-Q-Psion-P)**

Specify for each holiday listed in the dialogue box if it is a workday or a restday. The default is "Workday".

This function lists all public holidays that have been defined as "Custom" in the Public holiday file (see below).

Calendar - Exceptions

(Psion-Q-Psion-E)

Define up to 40 calendar exceptions. Each calendar exception can define an interval as a restday or workday. Calendar exceptions override all other calendar definitions.

To create a new entry at the cursor position, use the *Insert* function. To append a new entry at the end of the list, press TAB on an empty line.

To modify an entry, press TAB on an existing entry.

To remove an entry, press DEL on an existing entry.

Defining a new calendar exception

Calendar - Global holiday file

(Psion-Q-Psion-G)

The Global Holiday file contains all global information about public holidays. This file affects all project files. ProPoc is delivered with nationalised holiday files for some countries. If a special holiday file is not available for your country or if you have specific requirements you can edit the Global Holiday file.

- To create a new entry, press TAB on an entry marked as (free).
- To modify an entry, press TAB on an existing entry.
- To remove an entry, press DEL on an existing entry.

Each holiday entry has a mode and an algorithm.

- To change the mode, use the left/right cursor keys or type A,C,N for Always, Custom, Never.
- If the mode is set to "Always" the holiday will be enforced through all project files. If the mode is set to "Never" the holiday will not appear in any project file.
- If the mode is set to "Custom" the holiday will appear in the Public holiday list of each file (see above) and can be enabled or disabled for each file separately.
- To change the algorithm, press TAB.

In the following dialogue box, enter or modify the name, specify if the holiday depends on Eastern.

1. Easter based holidays

A second dialogue box lets you specify the offset from Easter Sunday.

You can define a number of days to be added.

Example:

GoodFriday is EasterSunday with an offset of -2.

2. Non-Easter based holidays

The holiday has a base date, a modification, an offset value (plus), and a direction.

The direction defines if the actual holiday is before or after the base date.

If the modification specifies a weekday, the actual holiday will be placed on the next weekday before or after the base date. If the modification specifies "next workday" the actual holiday will be placed on the first available workday before or after the base date. The delay specified under "plus" will be added to or subtracted from the result depending on the specified direction.

Example:

Name: Busstag (Germany)
Base date: 19 Nov
Modifier: Sun
plus: 4
Direction: before
Result: Wednesday before the fifth Sunday before Christmas



Changing the algorithm of a holiday

Other Preferences - View

(Psion-Q-Psion-V)

- The *grid* setting works independently for Normal mode and Condensed mode.
- *Links* between tasks can be shown in normal mode, condensed mode, and PERT mode. The setting works independently for each of the 3 modes. The setting can be changed with the *Show/Hide link* function, too.
- Set the *cursor* to blinking for better visibility. Some other screen items like scroll arrows, and the reorder indicator will blink to. This feature will draw a bit more power from the battery.
- Set *draw offscreen* to YES to speed up drawing. You will not see the process of drawing, but the screen goes blank first and reappears after the drawing has finished.

- (P) *Show* and *but only* are filters that allow to restrict the set of displayed tasks in detailed table mode. You can show all tasks, or only activities, milestones, subprojects. You can narrow this set further by displaying only tasks that are: critical, completed, in progress, open, where the costs exceed the budget, or where the constraints are violated.
- In *PERT* mode, select the 2 attributes to be shown with each task. (PERT display 1, PERT display 2). (P) This setting works independently for Outline mode.

Other Preferences - Format

(Pсион-Q-Псион-F)

- *Fonts* can be set for normal mode, condensed mode, table mode, and PERT mode independently. The font setting is changed by the *Zoom* function, too. ProPoc supports all 13 inbuilt fonts of the S3a.
 - ☞ *On the S3 the system font, a small font, and a large font are available.*
- The *date format* (numeric/alpha) applies to the presentation of the month. (Or the day presentation, if the time base is hours/minutes.) The sequence of day/month/year and the date separator depends on the systems setting (CLOCK application.) The alpha format supports only "Day Month Year".
- The *currency* symbol is file specific and can be changed. It is used to identify costs on screen and in printouts. The default currency symbol is taken from the system settings (SYSTEM application).

Other Preferences - Table definition

(PSION-Q-PSION-T)

Define the table layout for screen (table mode) or for printing to a printer, into an ASCII text file, or into a WORD file.

(P) A separate set of tables exists for Outline mode.

Define which task (project) attributes will make up the columns in tables.

The first column is always the name of the task (project).

All other columns can be customised. Each table can have up to 16 columns.

☞ *When creating a table for WORD files, consider that WORD can handle only 8 tabs. This restricts the number of columns to 9 (8 if Resource was selected.). ProPoc will give a warning if this value is exceeded.*

- To insert a new column selector at the cursor position, invoke the *Insert* function.
- To append a new column selector at the end, press TAB on an empty line.
- To modify a column selector, press TAB on an existing column selector.
- To delete a column selector, press DEL on an existing column selector.

Other Preferences - Mode

(Psion-Q-Psion-M)

- For small projects set *Reorder* to "automatic". This will ensure that the file is reordered after each change that needs reordering. For big projects it is better to use "manual" and to call the Reorder function from time to time.
- The *resource* parameter should be set normally to YES.
 - If you set it to NO the project will be calculated as if no resources had been defined.
 - This feature can be used to find out how much a project is delayed by resource conflicts. A more detailed analysis is possible with the (P) bottleneck function.
 - A third option is to switch resources off only for the computation of the slack but to consider them for the computation of start and finish time.

In the initial design phase of a project it might be advisable to switch the resources off, as this increases recalculation speed considerably.
- *Charge for all work*: The fix costs, the resource one-off costs and the resource utilisation costs are charged for all tasks independently of the task status.
Charge for completed work: Nothing is charged for open (0%) tasks. The fix costs, the resource one-off costs and a proportion of the resource utilisation is charged for completed or partially completed tasks.
- Optionally you can be warned on *constraint violation* (target date cannot be fulfilled) during a reorder.

Other Preferences - Alarm, Agenda

(Psion-Q-Psion-A)

- *Alarm handler*: You can switch all alarms off or direct the alarms to Morpheus (P) or the AGENDA. Please see the chapter about Alarms for details. If you select OFF, existing and already scheduled alarms are deleted.
- The *Alarm Time* defines the time of day when alarms shall go off. The default is 11 am. This entry is only available for day based files.
- (P) If the AGENDA was chosen as an alarm handler, some more definitions must be made. Specify the appropriate *Agenda file* (usually there is only one).
- (P) The *Unique symbol* will appear as a year symbol in the agenda. It is necessary to define a different symbol for each project file. The symbol is used to identify ProPoc entries in the agenda file. Changing it, may render the entries un-updatetable.

(P) All other attributes (alarm settings, format) apply only to new entries in the Agenda.

☞ *When the starting date of a task changes, the corresponding entry in the agenda will be updated with the new date when the ProPoc file is closed. All attributes of this entry will be maintained, so it is quite safe to attach notes to these entries or to make other modifications.*

Other alarms settings, including the prewarn time, are defined separately for each project (*Modify project*).

(P) Other Preferences - Locations

(Psion-Q-Psion-L)

Define the names of up to 7 locations. Locations can be used for advanced resource control. If a location is specified in the project definition, it is made sure that the same resource is not used in two different locations at the same time.

☞ *Location names must not contain a comma.*

(P) Other Preferences - File links

(Psion-Q-Psion-I)

- Set *subproject* to NO if you do not plan to use the current file as a subproject in other files. The default value YES will slow down the closing a file.
- Set *Inherit* to YES if you want to import calendar and resource definitions from a master file. In the following dialog box specify the name of the masterfile.

Zoom in

Psion-Z

The *Zoom in* function selects the next larger font. The function works font conservative: If a serif font was active, a larger serif font will be used. If the largest font is already active, the function switches to the smallest font.

The font setting can also be changed through *Preferences* and works independently for each screen mode.

The function can also be used to narrow the time window for *Resource schedule*, (P) *Quick schedule* and *Cashflow*.

Zoom out

Psion-Shift-Z

The *Zoom out* function selects the next smaller font. The function works font conservative: If a serif font active, a smaller serif font will be used. If the smallest font is already active, the function switches to the largest font.

The font setting can also be changed through *Preferences* and works independently for each screen mode.

The function can also be used to narrow the time window for *Resource schedule*,(P) *Quick schedule* and *Cashflow*.

☞ *On the S3 there is only one Zoom functions that steps through the 3 fonts.*

(P) Password

Psion-Shift-W

To specify a password for your project file type in the password (and a second time behind *Verify*).

The next time you open the file you will be required to enter the specified password.

☞ *Passwords can only be defined in ProPoc PROF, but ProPoc LITE will also prompt for a password if a password protected file is opened.*

Printer setup

Psion-Y

Define the printer model, the printer device, and the margins.

Select a printer other than *General* for bitmap graphics and enhanced text output. Select the *General* printer for plain text output.

If you selected "Serial" for printer device you are prompted for the parameters for the serial interface. See the PSION User Guide "Printing - Setting up the connection".

If you selected "Printfile" you are prompted for a file name for the print output. It is possible to specify remote files, even remote printer ports (e.g. REM::LPT1).

The margins are specified in inch or centimetre whatever was set up for your system (*System screen, Printer setup*).

Exit**Psion-X**

Leaves ProPoc. At this point, ProPoc will, if necessary, reorder the project, save the current computation state and all preferences, and will update the alarms. This will be done in the background. The project file name on the system screen will stay bold for a few more seconds until the updating has been finished.

4.8 Diamond title**Diamond/Shift-Diamond**

Alternatively to selecting display modes with the functions of the diamond title you can toggle display modes with the diamond key. Shift-diamond key works in the opposite direction.

☞ On the S3 use Shift-MENU, or the hotkeys listed below.

Normal mode**Psion-Shift-N**

Switches to normal mode (Task calendar). Each day is displayed in the character width of the font selected.

Condensed mode**Psion-Shift-C**

Switches to condensed mode (Task calendar). Each day is displayed in the width of 3 pixels (2 on the S3). This is independent from the font selected.

Table mode**Psion-Shift-T**

Switches to table mode. The tasks are shown in a spreadsheet like style and can be edited directly. You can setup the table columns with *Preferences-Table Definition*.

(P) Use the *Preference View* function to restrict the set of tasks shown with a filter.

PERT mode**Psion-Shift-P**

Switches to PERT mode. Tasks are shown as boxes with two attributes displayed. Use the *Preference View* function to select the attributes to be displayed.

Appendix A - The help system

When you press HELP the help system becomes active. To get help about the help system press the HELP key a second time.

Help is provided by the MORPHEUS help server, an independent application that runs in the background. On a help request MORPHEUS will come to the foreground and display contents from the ProPoc help file. The help system is context sensitive, i.e. the text depends on the currently executed function.

One help page can have up to 18 lines. Arrows at the right hand side indicate if there is information above or below the visible window. Use the cursor keys to scroll.

If a page contains bold keywords, you can select one of them with the cursor keys. If you press ENTER on a highlighted keyword, the help page associated with that keyword will be shown.

You can search for a specific keyword by pressing TAB and entering the keyword.

The following keys have special effect when the help system is active:

HELP	Show help about HELP
Control-HELP	Show help index
TAB	Search for keyword
ESC	Go back one card, on first card go back to ProPoc
Control-ESC	Go back to application immediately.

Appendix B - The ProPoc directory structure

The following folder structure is used.

- \APP\ for the top module of ProPoc (ProPoc.opa)
- \APP\PROPOC\ for all other modules and parts
- \APP\HELP\ for the help file
- m:\ for the ProPoc license file

- m:\APP\ for the top module of Morpheus (Morpheu2.opa)
- m:\APP\MORPHEU2\ for additional Morpheus modules

- \PROJ\ for project files
- \PROJ\projectfile\ for associated documents

- \WRD\ for output text and word files
- \SPR\ for output spreadsheet files

The following extensions are used

- .OPA for modules
- .TMP for templates (printing and spreadsheets)
- .HLP for the help file
- .FON for additional screen fonts (S3 only)
- .INI for the global public holiday file and other preferences
- .\$\$\$ for the ProPoc profile

- .PJT for project files
- .MPX for files in MicroSoft project exchange format
- .WRD for associated documents and output WRD files

- .TXT for output text files
- .WKS for output WKS files
- .SPR for output spreadsheet files

Index

Symbols

.TXT 37, 47
.WRD 37, 48

A

About box **59**
activity 17, 18, **19**, 20, 25, 42
Agenda 14, 17, 35, 40, 63
 alarms **40**
 import **41**
ALAP 20
alarm 17
 advance 17
 handler 17, 63
 time 63
Alarms **40**, 52
alarms 21, 66
alpha key 29
appointment 41
As Late As Possible 20
As Soon As Possible 20
ASAP 20
ASCII 36, 37, 47, **62**
associated document 37, 38, 48, 52, 55, **56**
 merge 38,56
availability 19

B

background 11, 38, 66
baseline **10**, 33, 53
Baseline function **49**
battery 61
bitmap 38, 48
bottleneck 47, **51**
Bottleneck Analysis 33
budget 17, 18, 21, 53, 54, 62
but only option 62

C

calendar **8–9**, 10, 14, 25, 26, 42, 43, 44
 exception 8–9, 35, 42, 44, 60
 pop up 36
 ruler 26
capacity 33
CAPS key 29, 35, 50
cashflow 16, 31, 33, 47
Cashflow Analysis **53–54**
character size 25
charge
 for all work 63
 for completed work 63
chevrons 41
clipboard 52, 55
Clock application 8, 37, 59, 62
column 38
columns 62
completion 17, 20, 33, 62

compress 46
constraint **20**, 54
 date. *See* **Target date**
 violation 20, 22, 62, 63
constraints 52
CONTROL-key 29
Copy task **55**
copyright 59
cost 13, 18, **21**, 33, 53, 54, 62, 63
 fix 21
 per activity **13**
 per workday **13**
 resource 13
country 9, 60
critical 22, 27, 62
critical path **17**, 21
currency 37, 42, 44, 62
cursor 29, 38, **58**, 59, 61
cursor key 29, 32, 33, 51
custom public holidays 35
customise 9, 60, 62
Cut task **55**

D

date
 current 26
 entering 36
 format 37, 42, 62
 jump to 59
Define Resource **49–51**
definition box **34**
delay 33, 51
Delete task **55**
description 19, 52, 54
 search by 58
Detail function **48–49**
detail mode 33, 53
diagram 38, 47, 48
diamond key 66
directory structure **68**
disabled 16
disk 46
 space 56
document
 associated 38, 48, 52, 55, 56
 merge 56
draw offscreen 61
duration 17, **20**, 22
duration driven **21**

E

earnings 17, 21, 33, 53
Edit task 38, **54–56**
effort driven **22**
exception
 calendar 8–23
Exit **66**
export 51, 54

F

file 7, 46, 52, 60
 ASCII 36, 47, **62**
 conversion 46
 global public holiday 9
 links **10–23**
 master **10**, 64
 project 10, 11, 47
 subproject 10, 42, 46
 WORD 36, 38, 48, **62**

File Open 44

files 10
 ASCII 37
 main 10
 project 9
 WORD 37

filter 62

Find **58–59**

Find next **58**

Find previous **58**

Finish No Earlier Than 20

Finish No Later Than 20

Finish to Start 22, 57

flash SSD 46

FNET 20

FNLT 20

font 62, 64

FS **22**, 57

full time **13**

G

global public holiday file 9

global public holidays 34

Go to depending 57

Go to prerequisite 57

graphic display 53

graphic mode **25–26**

graphics
 spreadsheet 39, 47

grid 26, 61

group 12, 13

H

HELP key 67

help system 67

Hide links **58**

holiday 14, 31, 42, 59, 60
 Easter based 61

holidays
 public 8

hotlink 16, 38, 54

HyperPoc 16, 19, **38**, 52, 54

hypertext 38

I

inherit 64

Insert function 35, 36, 50, **52–54**, 60, 62

interrupt 11

J

Jump to date **59**

K

key
 short-cuts **30**

L

lag 19, 54, 57

lead 19, 54

Link
 Show 61

link 17, 25, 57
 hide **58**
 modify 57
 options 57
 show 57

Link function 19, **56–58**

Load Agenda 35, 41, 50, 59

location 16, 64

M

main file 10

margins 47, 65

masterfile **10**, 64

MENU key 34, 39

merge 56

MFO 20

milestone 17, 18, **19**, 20, **23**, 25, 27, 42, 52
 hot **18**

mode
 condensed 25, 61
 detail 33, 53
 graphic **25–26**
 link 56
 normal 25, 61
 out-
 line 33, 36, 38, 39, 48, 50, 53, 54, 56, 58, 62
 PERT **29**, 62
 table 27, 36

Modify project 38, **52–54**

Morpheus 17, 40, 67

MPX 16, **42**, 47, 59
 export **42–44**
 import **44–45**

MS Project 42

MSO 20

multimedia 38

Must Finish On 20

Must Start On 20

N

name
 search by 58

navigation **29**

New file **46–49**

O

- Open file **46–49**
- Outline function **48–49**
- outline
 - mode 27, 33, 36, 38, 39, 48, 50, 53, 54, 56, 58, 62
- overtime surcharge **13, 50**

P

- part time **13**
- Password **65–66**
- performance 11
- PERT mode **29, 62, 66**
- PocView 39
- Preferences **8, 40**
 - Alarms 40, **63–66**
 - Exceptions 35, **60–66**
 - File Links 10, **64–66**
 - Format 18, **62–66**
 - Global holiday file 9, **60–66**
 - Locations 16, **64–66**
 - Mode **14, 18, 20, 21, 63–66**
 - Public holidays **59–66**
 - Table 27, 38, 47, **62–66**
 - View 20, 26, 27, 29, **61–66**
 - Week 8, 34, 41, **59–66**
- prerequisite 16, 19, 55, 56, 57
 - search by 58
- prerequisites 55
- print **47–49, 51**
- Print function 32
- printer 36, 47, **62, 65**
 - setup 37, 47
- Printer setup **65–66**
- Printing **37**
- priority 21
- project **15, 40, 42, 44, 45, 48, 50, 52, 62, 64**
 - activities 17
 - alarm 17
 - alarm advance **17**
 - budget 17, 18
 - completed 17
 - description **16, 52**
 - disabled **16**
 - documentation 38
 - duration 17
 - links 17
 - location **16, 64**
 - name **16, 25**
 - number of 59
 - planned start **17**
 - rank **16, 19, 21**
 - required by 17
 - statistics 53
 - total costs **18**
 - WBS **16**
 - workload **18**
- PSION key 29, 32, 34
- PSION-TAB 39
- public holiday 59, 60

- public holidays 8
 - custom 35
 - global 34

Q

- QuickSchedule 32, **51, 58**

R

- RAM 46
- rank 16
- rated **13**
- recomputation. *See* Reordering
- registration 59
- Remove document **56**
- Remove project **52–54**
- reorder 46, 47, 63, 66
 - indicator 61
- Reorder function **49**
- reordering **11, 14, 21**
 - automated 11
 - interrupt 11
 - manual 11, **49**
- Repeat task **55–56**
- repetition 55
- report 38, 47, 53
- report box **32, 38, 39, 47, 50, 51**
- Reset to default 36
- resource,
 - 17, 18, 19, 20, 32, 33, 35, 41, 43, 45, 51
 - availability **21, 41, 50**
 - calendar **14, 35, 41, 42**
 - capacity **12, 21**
 - clashes 10
 - competition 11, 63
 - conflicts 16, **21**. *See also* resource: competition
 - cost 13, 18
 - definition 10, **12, 35, 42, 44, 49**
 - levelling. *See* resource: competition
 - location 16, 64
 - name **12**
 - overalllocation 13
 - schedule 16, 21, 31, 32, 47, 51, 58
 - cumulated 32
 - scheduling. *See* resource: competition
 - search by 58
 - sharing. *See* resource: competition
 - utilisation 14, 32, 50
 - workload 50, 54
- Resource Calendar **49–51**
- Resource Schedule **50–51**
- restday 8, 9, 14, 25, 31, 59, 60
- Review baseline 33, **53–54**
- ruler 26

S

- Saturday 26
- Save as 39, 42, **47–49, 51, 54**
- search 58
- selective browsing 29

semigraphical 38, 48
 shared in project 13
 shared overall 13
 Show Info 56
 Show Links 57
 Show option 62
 slack 22
 SNET 20
 SNLT 20
 split screen 31, 50
 SPR 39
 spreadsheet 16, 39, 47, 51, 54
 SS 22, 57
 Start No Earlier Than 20
 Start No Later Than 20
 Start to Start 22, 57
 Statistics 53
 status 20
 subproject 10, 11, 19, 20, 25, 42, 47, 52, 64
 file 10, 20, 21, 42, 46
 summary line 32, 33
 summary task 42, 44
 Sunday 26
 surcharge
 overtime 13. *See also Overtime surcharge*
 Switch project 54
 synchronise 10
 system
 settings 37
 SYSTEM application 62

T

TAB key 29, 32, 34, 36, 39
 TAB-key 50
 table 38, 47
 definition 36
 layout 36, 62
 mode 27, 36
 Table mode 66
 target date 20, 54, 63
 task 18–19, 43, 44, 48, 54, 55, 62
 budget 21, 54
 constraint 20
 cost 21, 54
 depending 57
 description 19, 38, 52, 54
 duration 20, 22
 lag 19, 54
 lead 19, 54
 links 22
 name 19
 prerequisite 19
 priority 19, 21
 required by 22
 scheduling 21
 slack 22
 status 20
 summary 42, 44
 target date 20
 WBS 19, 54
 workload 21

third party project management software 13, 42
 time
 base 8, 10. *See also time: unit*
 calendar 8–23
 entering 36
 unit 9, 14, 17, 34, 41, 44, 46
 window 32, 33, 37, 41

U

Unlink 57
 utilisation 12

V

violation
 constraint. *See constraint: violation*

W

WBS 16, 19, 52, 54
 weekday 8, 34, 59
 WKS 39
 WORD 36, 37, 38, 47, 48, 56, 62
 work hour 9
 work minutes per day 34, 41, 59
 work period 9
 workday 8, 9, 19, 34, 59, 60
 workload 10, 12, 13, 21, 50
 average 18
 WYSIWYG 48

Y

year symbol 40, 63

Z

Zoom 25, 26, 32, 33, 51, 53, 62
 Zoom in 64
 Zoom out 65–66