

A-Plan[®] X

Manual

Release 2.17

01/2024

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INSTALLATION

GENERAL NOTES

Manual

Please note that the manual has been machine translated and therefore translation errors can unfortunately not be completely excluded.

System requirements

To install and run A-Plan, your PC must have the following equipment:

- Win 7 (32/64 bit), Win 8/8.1 (32/64 bit), Win 10 (32/64 bit) or Win 11 (64 bit)
- Processor from approx. 10,000 "Cinebench R23" points (multicore), see e.g. [Benchmarks Cinebench R23](#)
- approx. 300 MB free hard disk space
- Administrator right (only for installation)
- Microsoft SQL server (only SQL version of A-Plan, see "SQL version" on page 182)

A-Plan X can also be installed on terminal servers without any restrictions. However, since there are different configurations, we recommend tests with a larger database before a productive use.

SINGLE-USER INSTALLATION

Installation

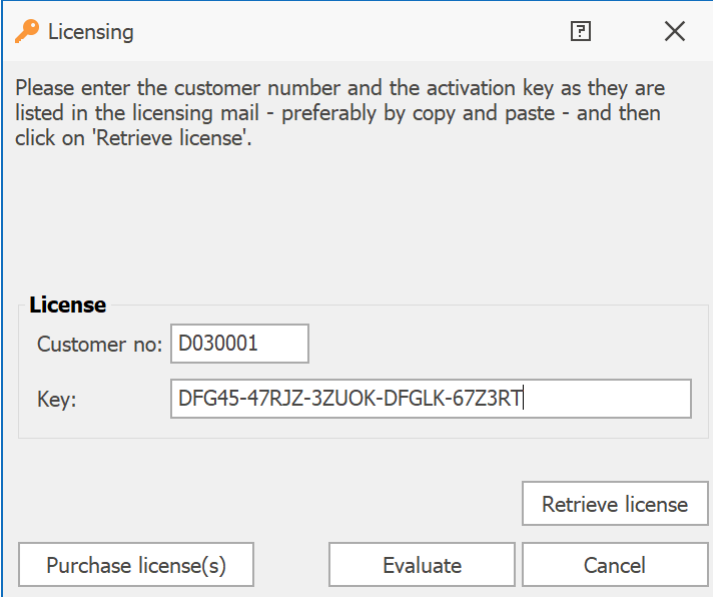
Unpack the **installation archive** (see [Download PM Software Trial \(braintool.com\)](#)) and double-click the **Setup_APlanX.exe** file.

During the subsequent installation of A-Plan, the installation directory can be changed. However, if possible, you should not install A-Plan X in a directory that contains a previous version of A-Plan.

The rest of the installation runs automatically.

Note: If there are any problems with the installation, please **right-click** the installer and select **Run as administrator**.

Licensing



Please enter the customer number and the activation key as they are listed in the licensing mail - preferably by copy and paste - and then click on 'Retrieve license'.

License

Customer no: D030001

Key: DFG45-47RJZ-3ZUOK-DFGLK-67Z3RT

Purchase license(s) Evaluate Retrieve license Cancel

When you start A-Plan for the first time, you will be asked to enter your **customer number** and the **key**. It is best to **copy and paste** the key from your licensing email to avoid transmission errors.

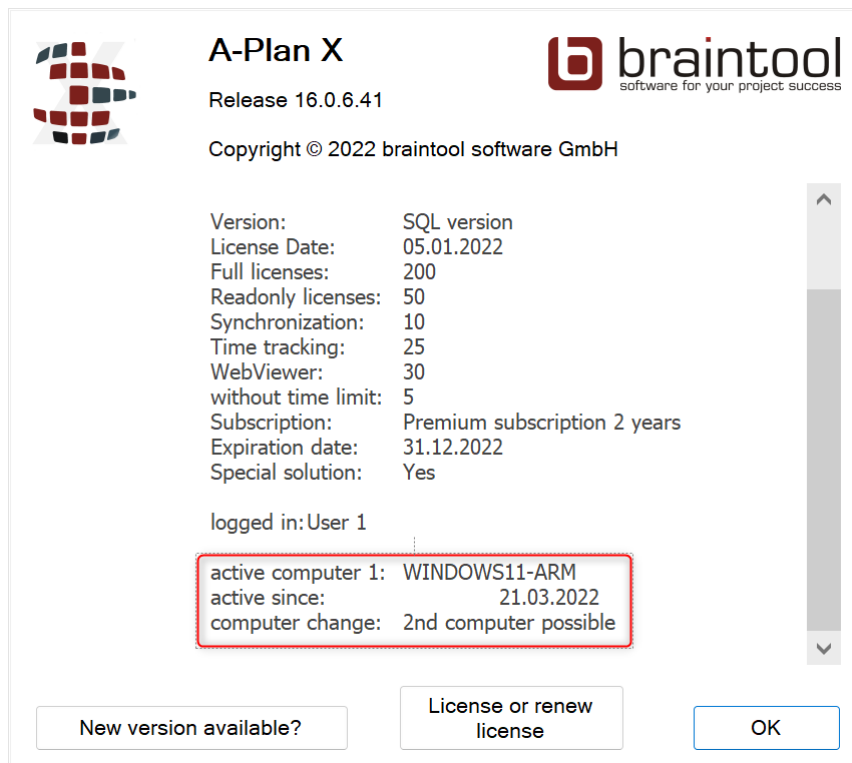
Then click **Retrieve license**.

If you do not have a full version yet, you can test A-Plan for 30 days. The call of A-Plan in trial mode is done by clicking **Evaluate**. Files created in this way can be used in the full version. A new installation is not necessary, you only have to unlock A-Plan by entering name and key. You will receive the required key when purchasing the full version.

Re-licensing (additional modules)

If you have subsequently purchased a license for the synchronization or time tracking module, you can call up the licensing window again under **File / Info**.

Use on 2 computers



You can use A-Plan on 2 different computers, e.g. on a computer in your company and on a computer in your home office.

Please note that a change to a third computer - and thus deactivation of one of the two computers previously used - is only possible if the activation of the computer to be replaced was at least one week ago.

INSTALLATION FOR MULTI-USER DEPLOYMENT

We strongly recommend installing A-Plan on the **clients and** not on a server (unless it is a terminal server), as this is the least likely to cause problems in the long run (e.g. different versions of program libraries on the client and on the server, wrong or missing references, etc.). Also, when installing A-Plan on the clients, all users can access a database located on the server together!

Installation

Application installation

For multi-user use, A-Plan is installed on the individual clients in the same way as the single-user version (see "Single-user installation " on page 8). The network functionalities are only released by entering the corresponding licensing data.

The licensing data must only be used by one user - with master rights for A-Plan (see "Master, Admin" on page 147) - to enter the licensing data. To do this, proceed as follows:

Installation of A-Plan on a client.

Start A-Plan and enter the licensing data (see "Licensing" on page 9).

Create a database and enter the user(s) (see "User " on page 145).

When the registered users open the database, the license data is automatically transferred to the Windows account used.

In general, there **must be a license for each user**, regardless of whether they use A-Plan at the same time or at different times. The licenses for A- Plan are therefore **not floating licenses**.

Modification of the license (additional licenses, additional modules)

If you have increased the number of licenses by purchasing additional licenses or have subsequently purchased licenses for the synchronization or time tracking module, the license data will be automatically updated the next time you start A-Plan.

INSTALLATION WITH EXISTING OLDER VERSION OF A-PLAN

General

A-Plan X can initially be installed in parallel with an older version of A-Plan without any problems, since neither the existing program nor data or settings are changed by the installation of A-Plan X. This applies to both the standard and the SQL version.

Adaptation of existing databases (standard version)

The **customization of SQL databases** is described in the chapter Convert database(s) from A-Plan 2018 SQL on page 190 described.

Databases of the A-Plan 2018 version are automatically converted incl. the existing profiles and holidays when opening by A-Plan X. The existing database is not changed, but a new database with the extension .apldb is created.

Conversion of a database is only possible with **master rights** for the database (generally available with a single-user version of A-Plan).

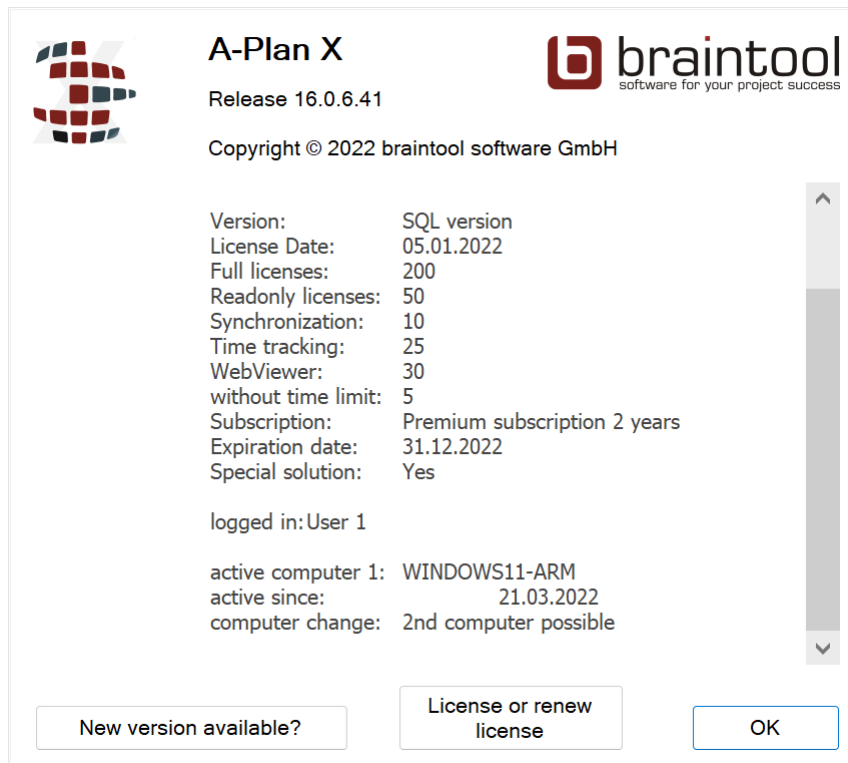
Important: Databases of **older versions of** A-Plan must first be converted to the format of A-Plan 2018, but this is also possible with the trial version of A-Plan 2018 (see [Down-load PM Software Trial \(braintool.com\)](http://braintool.com)).

UNINSTALLING A PREVIOUS VERSION OF A-PLAN

After successful installation of A-Plan X, you can uninstall an existing previous version of A-Plan (**Start / Settings / Control Panel / Add or Remove Programs**).

INFO ABOUT A-PLAN (LICENSE DATA, RELEASE NUMBER)

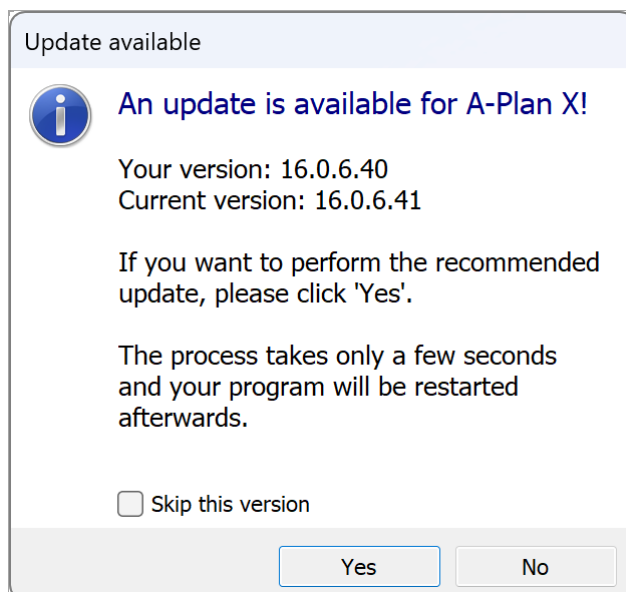
After clicking on the "i" in the gray circle (top right of A-Plan) or under **File / Info**, the currently used release number and the licensing data are displayed:



Here you can also relicense A-Plan and check if there is a newer release of A-Plan X available.

Updating the installation (patches)

If a new release is available due to changes or fixed bugs, a corresponding notification window is displayed when A-Plan is started:



It is generally recommended to perform the update.

Since the update requires administrator rights under Windows, only a corresponding note is displayed for users without administrator rights. In these cases, the installation should be carried out by the person responsible for IT.

Different release levels usually do not cause any problems, so that not necessarily all installations have to be updated at the same time.

The release status can be queried in multi-user deployment in the user administration (see "User " on page 145).

INSTALLATION OF A-PLAN ON AN ADDITIONAL OR NEW COMPUTER

A-Plan X can be used on 2 different computers per user.

For this purpose, A-Plan X is installed on the new or additional computer and, if necessary, also unlocked by the existing licensing. The activation is not necessary if an A-Plan server directory was set during the initial licensing (see Server directory on page 128) and on the additional computer a database is opened, which was already opened on the other computer.

Please note that a change to a third computer - and thus deactivation of one of the two computers previously used - is only possible if the activation of the computer to be replaced was at least one week ago.

REPAIR OF AN EXISTING INSTALLATION OF A-PLAN

If A-Plan can no longer be started due to defective program files, files overwritten by installation of other programs or missing program files, or if unexplained errors suddenly occur after startup, the original installation can be restored:

Click **A-Plan X** under **Start / Settings / Apps**, and then select **Repair**.

PROGRAM INTRODUCTION

A-PLAN SEMINARS

A-Plan seminars provide comprehensive introductions to the program, explaining all of A-Plan's features and how it works. In addition, participants receive support in entering their own data and advice on how to use A-Plan optimally for their specific needs.

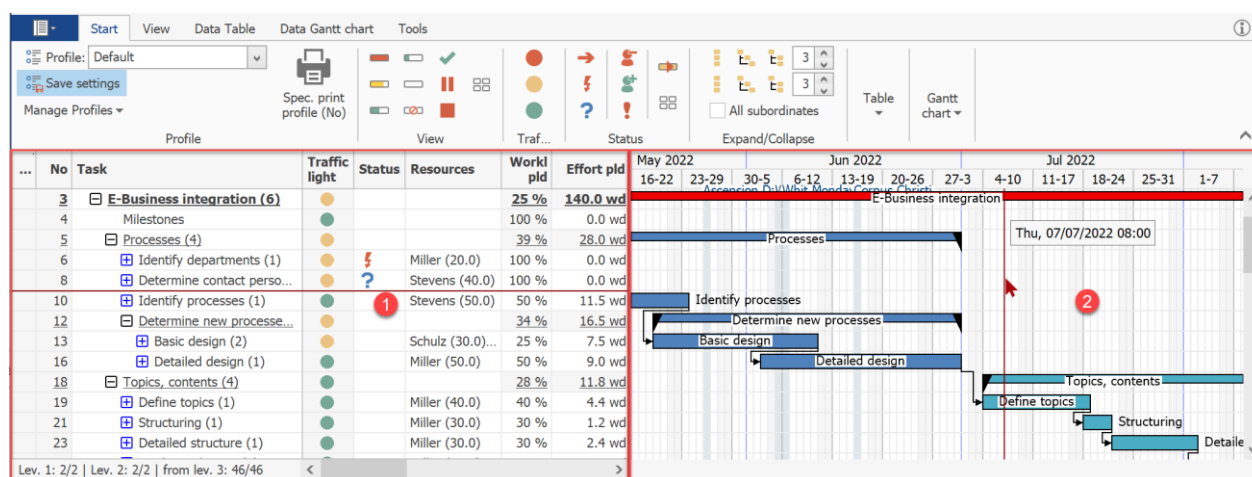
The seminars are offered both as "open seminars" at braintool software and as "in-house seminars" at the customer's premises.

Up-to-date information on dates, prices, etc. is available on the Internet at <https://www.braintool.com/schulung-beratung/>.

THE MAIN WINDOW

One of the great advantages of A-Plan is that almost all inputs can be made in the main window. It is therefore not necessary to constantly switch between different input windows, so that all the necessary data can be accessed very quickly.

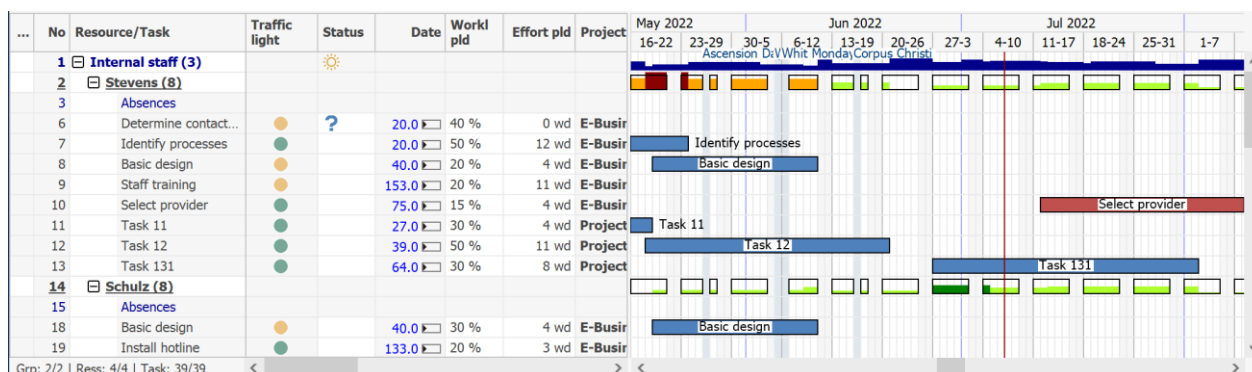
The central part of A-Plan is the **main table** with the **columns (1)** and **Gantt chart (2)**, which displays all the tasks present in a database:



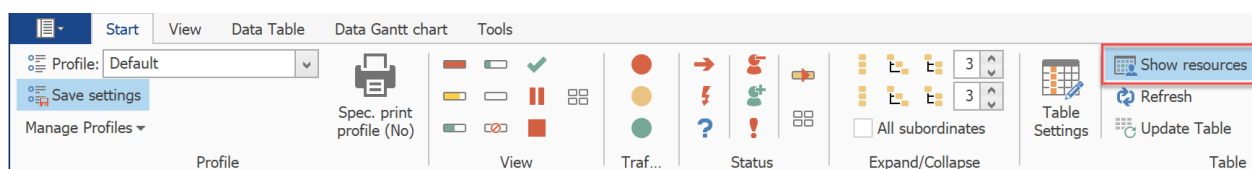
The **zoom factor** can be set at the bottom right, as with many other Windows programs. The **font and font size** can be set in the options (see General settings on page 113).

Resource View

the available resources with calendars, absences, assigned tasks and workload displayed in the lower part of the table:



In order for the resources to be displayed, the **Show resources** button must be engaged:



Structure (folders, projects, tasks)

In an A-Plan database, any number of projects can be created, each with any number of tasks, and these can be stored in folders for a better overview. E.g. one folder each for "development projects", one for "production orders", one for "press presentations", etc.

Lev	Task
1	Examples (2)
2	E-Business integration (6)
3	Milestones
3	Processes (4)
4	Identify departments (1)
4	Determine contact persons (1)
4	Identify processes (1)
4	Determine new processes (2)
5	Basic design (2)
5	Detailed design (1)
3	Topics, contents (4)

The tasks of a project can be subdivided as desired.

Folder (level 1) are displayed in blue color, **projects (level 2)** in bold font and tasks (from level 3) are displayed in normal font.

The numbers in parentheses after the designations represent the number of subitems at the next lower level.

Note:

If filters are set (see "Filter, Search" on page 72), it is possible that fewer subitems are displayed in the open state than are indicated in the parenthesis.

This structuring option makes it relatively easy to implement the recommended use of only one database for all current projects of a department or an organizational unit (see "Organization of data (database)" on page 37).

Expand and collapse headings

Task
Examples (2)
E-Business integration (6)
Project 2 (4)

Task
Examples (2)
E-Business integration (6)
Project 2 (4)
Milestones
Task 1 (3)
Task 2 (3)
Task 3 (3)
Task 31 (1)

Folders, projects and tasks with further subitems can be expanded or collapsed by clicking the square in front of the name.

Task 32 (1)
Miller
Task 33 (1)
Schulz

Likewise, tasks can be expanded to which resources have been assigned. The so-called **resource rows** are displayed in blue color.

☐ All subordinates

Expand/Collapse

It is also possible to expand or collapse a larger area or all headings.

For this purpose, there are corresponding buttons in the **Start** tab of the Ribbon. Pressing these buttons expands or collapses the **currently selected area**. If there is **no selection**, all headings will be opened or closed.

Meaning of the symbols:

Project view (top row icons)

	Collapse all layers completely
	Expand all levels completely
	Expand to the set level
<input type="text" value="3"/>	Level to which to expand

Resource view (bottom row icons)

Collapse groups/resources completely
Expand groups/resources completely
Expand groups only
Level to which to expand

If the **Ctrl key** is pressed at the same time as expanding blocks, not only all tasks but also the resource rows below them are expanded as well.

To collapse the resource rows, click the same button a second time without holding down the Ctrl key.

All subordinates refers to the filters set (see Filter, Search on page 72). If this option is active, not only the rows that meet the set filter conditions are displayed, but also the respective subordinate rows.

Table columns

The columns of the table can be configured as desired:

Column selection

Columns position

Wide

Column header

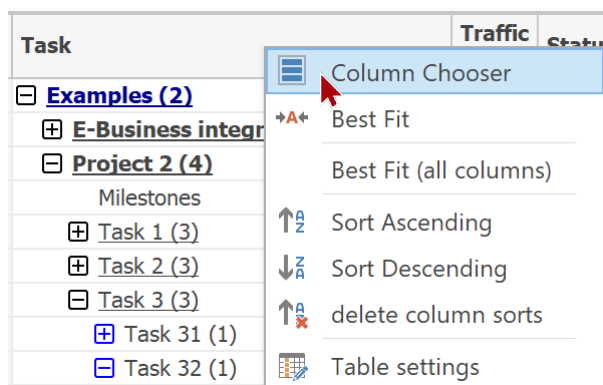
Format (date, user-defined number columns)

Addition yes/no (user defined number columns)

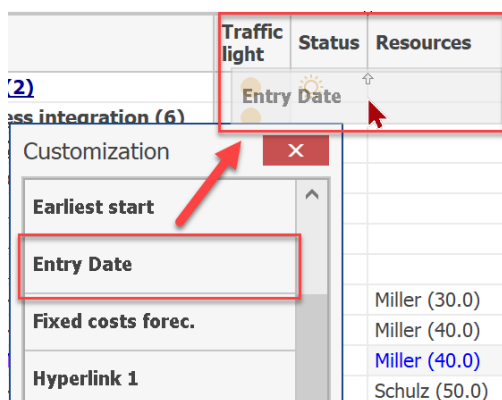
Saving the settings

Settings are **only updated when the 'Save settings' button** is active. This prevents temporary changes to the settings from unintentionally overwriting the corresponding settings in the profile (see also Working with profiles on page 128).

Column selection, position and width of columns



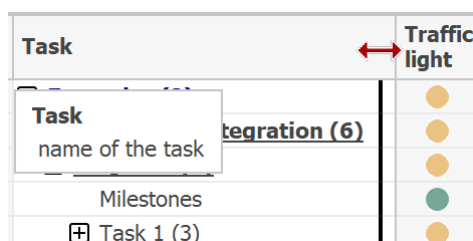
After clicking any column title with the **right mouse button**, the **Columns Chooser** is displayed, whose menu item **Column selection** shows a list of all available and currently unselected columns ...



... by drag & drop the columns can be **inserted** from this list at the desired position.

Conversely, columns that are to be **hidden** can be removed by dragging and dropping them onto the list.

In addition, the **position of the columns** can be changed by drag & drop.



The **width of a column** can be set by dragging and dropping the boundary line or by clicking **Best Fit** in the **Columns Chooser**. The menu item **Best Fit (all columns)** should only be used in exceptional cases, because this creates very wide columns with a lot of content.

Table settings - project table

After clicking a column title of the project table with the left mouse button, a dialog window is displayed where further settings of the currently selected columns can be made:

The screenshot shows the 'Table settings' dialog box with the 'Project table' tab selected. The dialog contains a table with columns for 'Fix', 'Orig. designation', 'Act. Designation', 'Digits', 'Time', 'Align.', 'Format', 'Add', and 'Sort order' (Level 1, Level 2, From ...). The 'Start pld.' row is selected, and the 'Time' checkbox is checked. The 'Sort order' column shows Level 1 as 1, Level 2 as 2, and From ... as 0. Below the table, there are 'OK', 'Apply', and 'Cancel' buttons. A note at the bottom states: 'Note: Change column order by 'dragging and dropping' column titles in the project or resource table. Other settings: Click column title with right mouse button.'

Project table								Sort order		
Fix	Orig. designation	Act. Designation	Digits	Time	Align.	Format	Add	Level 1	Level 2	From ...
<input checked="" type="checkbox"/>	Level	Lev	0		right					
<input checked="" type="checkbox"/>	Task	Task			left			1	1	0
<input type="checkbox"/>	Traffic light	Traffic light			left			0	0	0
<input type="checkbox"/>	Status	Status			left					
<input type="checkbox"/>	Resources	Resources			left					
<input type="checkbox"/>	Workload pld.	Workl pld	0		right			0	0	0
<input type="checkbox"/>	Work pld.	Effort pld	1		right			0	0	0
<input checked="" type="checkbox"/>	Start pld.	Start		<input checked="" type="checkbox"/>	right			0	2	0
<input type="checkbox"/>	End pld.	End		<input checked="" type="checkbox"/>	right			0	0	0
<input type="checkbox"/>	Duration pld.	Dur.	0		right			0	0	0
<input type="checkbox"/>	Note	Nt.			left			0	0	0

Note: Change column order by 'dragging and dropping' column titles in the project or resource table. Other settings: Click column title with right mouse button.

OK Apply Cancel

Fix

A check mark in the Fix column specifies that the column in question will be placed within the left block of the table and thus will not be moved by the scroll bar below the table.

Name of the column (current name)

The name of the columns can be changed after clicking on the current name.

Format of the displayed values (digits, time, alignment, format)

There are different options for setting the **format** depending on the type of column:

Text columns: no adjustment possibility

Date columns: Show **Time** (yes/no) - not available if a whole day is set as time grid (see "Time grid" on page 119)

Cost columns: The number of **Digits** can be entered after clicking. When entering negative digits, the values in the affected column are rounded (e.g. "-3 digits": 346,456.03 results in 346,000).

Custom number columns: Individual setting of the **Format** after clicking in the form "x 0.00 x". Where x stands for any sequence of letters and the number of zeros after the decimal point indicates the precision of the representation. Roundings cannot be made, thousand separators (",") are always set. Example: Format "0,000 €" represents 23532,34 in the form 23.532,340 €.

Alignment

Click to select "left", "right" or "centered" for the **Alignment**.

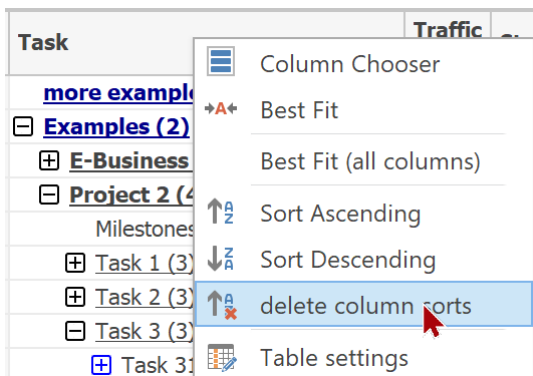
Addition (Add.)

By clicking a check box in the **Add** column, addition is activated in the user-defined number columns.

Sort order

The order in which the rows are displayed can either be unsorted or sorted according to different criteria.

Unsorted (fixed) order of projects/tasks



This mode is set when neither the **triangle** is displayed in a **column** as an indicator of an existing sort, nor a sort order is present in the **Table Setting** dialog box.

With this setting, the rows remain in the order in which they were entered. New rows are always inserted **below the** selected row, changes to the order can be made either by "Cut" and "Paste" or by moving them with the mouse ("Drag and Drop") (see "Moving rows (changing the display order)" on page 68).

Sorted order of projects/tasks

There are two variants for sorting: The **level dependent sorting** and the **column sorting**.

Level dependent sorting

It is often the case that tasks are to be sorted in a different way to folders or projects. Since this is not possible with the column sorting, the level-dependent **sorting order is available** for this in the **Table settings** dialog box.

With the setting shown here, the folders (= Level 1) are sorted alphabetically according to their designation, the projects (= Level 2) first according to their priority and then also alphabetically according to their designation. The tasks (From level 3) first according to their priority and then chronologically in relation to the planned start.

For columns that cannot be sorted, the input field is grayed out.

It should be noted that sorting is only possible by columns that are in the column selection (see "Saving the settings

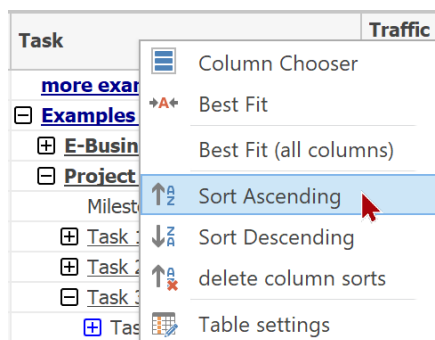
Settings are only updated when the 'Save settings' button is active. This prevents **temporary changes to the settings from unintentionally overwriting the corresponding settings in the profile** (see also **Working with profiles on page 128**).

Column selection, position and width of columns" on page 18) have been selected for display. If you do not want them to be visible, you can, for example, position them all the way to the right and set them very narrow.

Column sorting

Column sorting is activated by clicking the title of the desired column with the right mouse button and selecting **Sort ascending** or **Sort descending**.

This type of sorting is only available for the project view and not for the resource view. However, the resource view can be synchronized with the sorting of the project view or sorted chronologically independently (see "Sorting" on page 23).



... click the column title with the left mouse button and select **Sort ascending**:

Table settings - resource table

When clicking with the left mouse button on a column title in the resource table or selecting **Resource table in** the dialog window, the setting options for the resources are displayed.

These are - with the following exceptions - identical to the settings for the project table:

Do not show rows

In the case of resources, calendar and absence rows can be hidden independently of each other.

Table_settings

☐ Project table ☒ Resource table

Fix	Orig. designation	Act. Designation	Digits	Time	Align.	Format
<input type="checkbox"/>	Latest end	End late		<input checked="" type="checkbox"/>	right	
<input type="checkbox"/>	Earliest start	Start early		<input type="checkbox"/>	left	
<input type="checkbox"/>	Reminder date	Reminder date		<input checked="" type="checkbox"/>	right	
<input type="checkbox"/>	Traffic light	Traffic light			left	
<input type="checkbox"/>	Status	Status			left	

☒ Do not show special times ☐ Do not show task rows
☐ Do not show absence rows ☐ Do not show task rows w/o timebar
☐ Do not show workload ☒ Ignore all filters
☐ Show only resources that are present in the project view

Note: Show and hide columns: Click column title with RIGHT mouse button and 'drag' column caption from list to desired position or vice versa. Changing the order also by 'drag and drop'.

Sorting of resources: ☒ manual ☐ alphabetical
 Sorting of tasks: ☒ like project table ☐ chronological

OK Apply Cancel

Full display (none of the checkboxes is ticked):

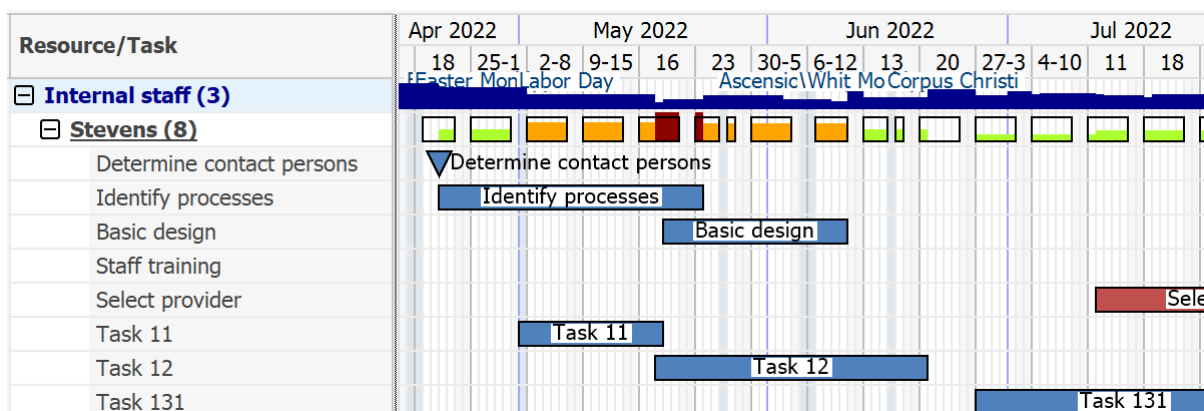
Resource/Task	Traffic light	Status
<input checked="" type="checkbox"/> Internal staff (3)		
<input checked="" type="checkbox"/> Stevens (8)		
Absences		
Special times		
Overtime		
Determine contact...		?
Identify processes		

Do not show **special times** and **absence rows**

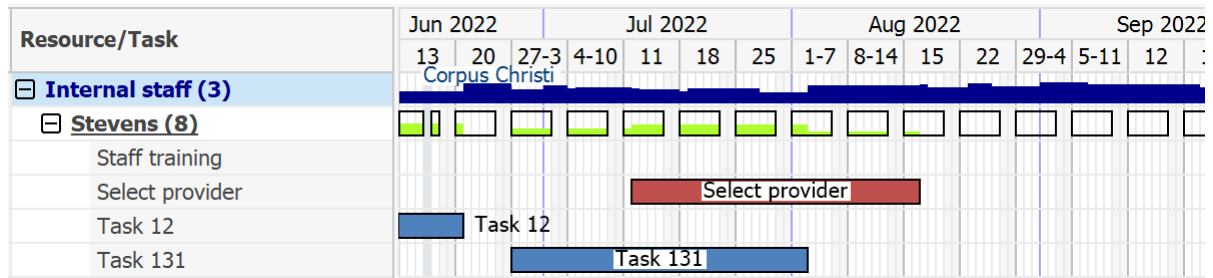
Resource/Task	Traffic light	Status
<input checked="" type="checkbox"/> Internal staff (3)		
<input checked="" type="checkbox"/> Stevens (8)		
Determine contact...		?
Identify processes		

Do not display **task rows**

Task rows can be deselected either completely (**do not show task rows**) or partially (**do not show task rows without time bars**). In the second case, only the task rows with time bars in the visible area of the Gantt chart are displayed. As soon as no more time bars are visible by moving the Gantt chart, the affected rows are hidden:



...



Sorting

Table_settings

☐ Project table ☒ Resource table

Fix	Orig. designation	Act. Designation	Digits	Time	Align.	Format
<input type="checkbox"/>	Latest end	End late		<input checked="" type="checkbox"/>	right	
<input type="checkbox"/>	Earliest start	Start early		<input type="checkbox"/>	left	
<input type="checkbox"/>	Reminder date	Reminder date		<input checked="" type="checkbox"/>	right	
<input type="checkbox"/>	Traffic light	Traffic light			left	
<input type="checkbox"/>	Status	Status			left	

☒ Do not show special times ☐ Do not show task rows
☐ Do not show absence rows ☐ Do not show task rows w/o timebar
☐ Do not show workload ☒ Ignore all filters
☐ Show only resources that are present in the project view

Note: Show and hide columns: Click column title with RIGHT mouse button and 'drag' column caption from list to desired position or vice versa. Changing the order also by 'drag and drop'.

Sorting of resources

☒ manual ☐ alphabetical

Sorting of tasks

☒ like project table ☐ chronological

OK Apply Cancel

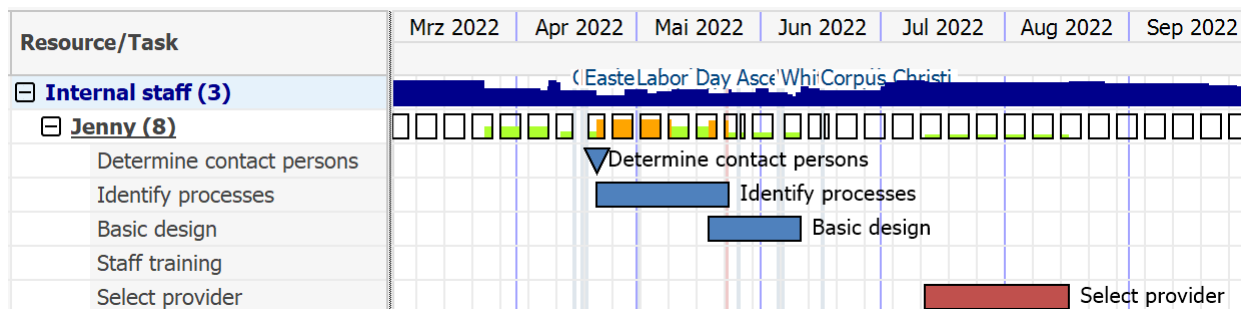
The sorts of the resources and the tasks assigned to the resources can be set independently.

The **sorting of the resources** is either fixed (= manual) according to the order during input or after definition by moving the resources or resource groups via drag & drop or is done alphabetically.

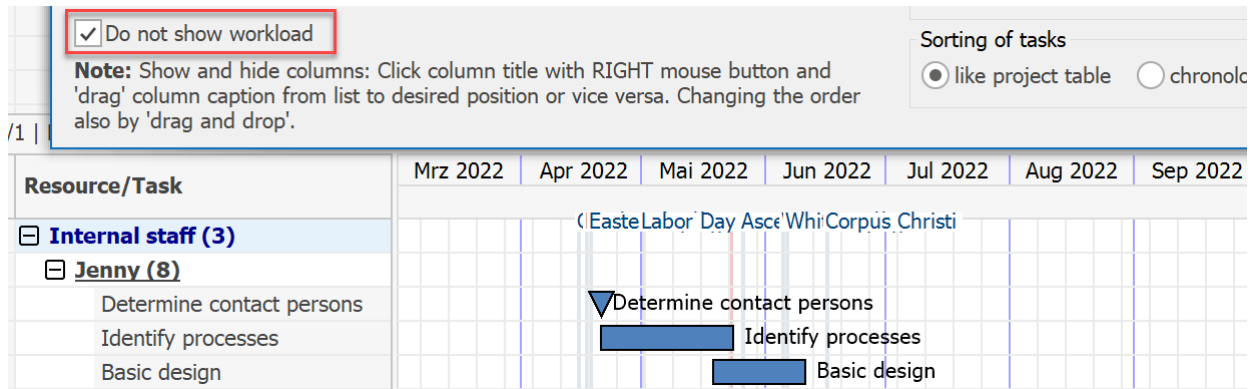
The assigned **tasks** are displayed either in the order according to the project table or chronologically according to the planned start.

Do not show workload

With workload:



Without workload:



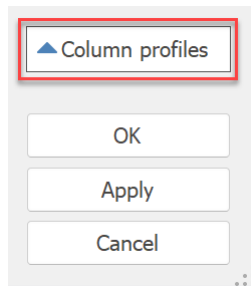
Ignore all filters

Regardless of which tasks are displayed in the project table in the upper part of A-Plan, **all tasks are displayed in the resource table without taking filters into account.**

Show only resources that are present in the project view

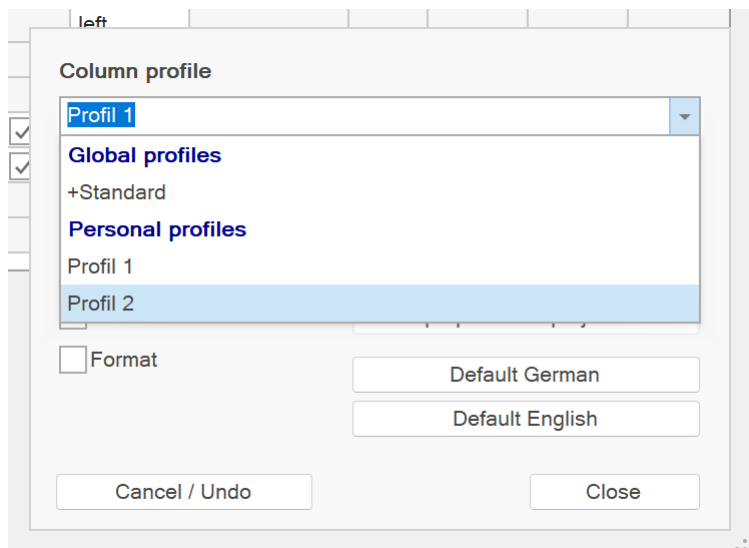
Only the **resources that are currently available in the project view** as assigned resources are displayed in the resource view.

Column profiles



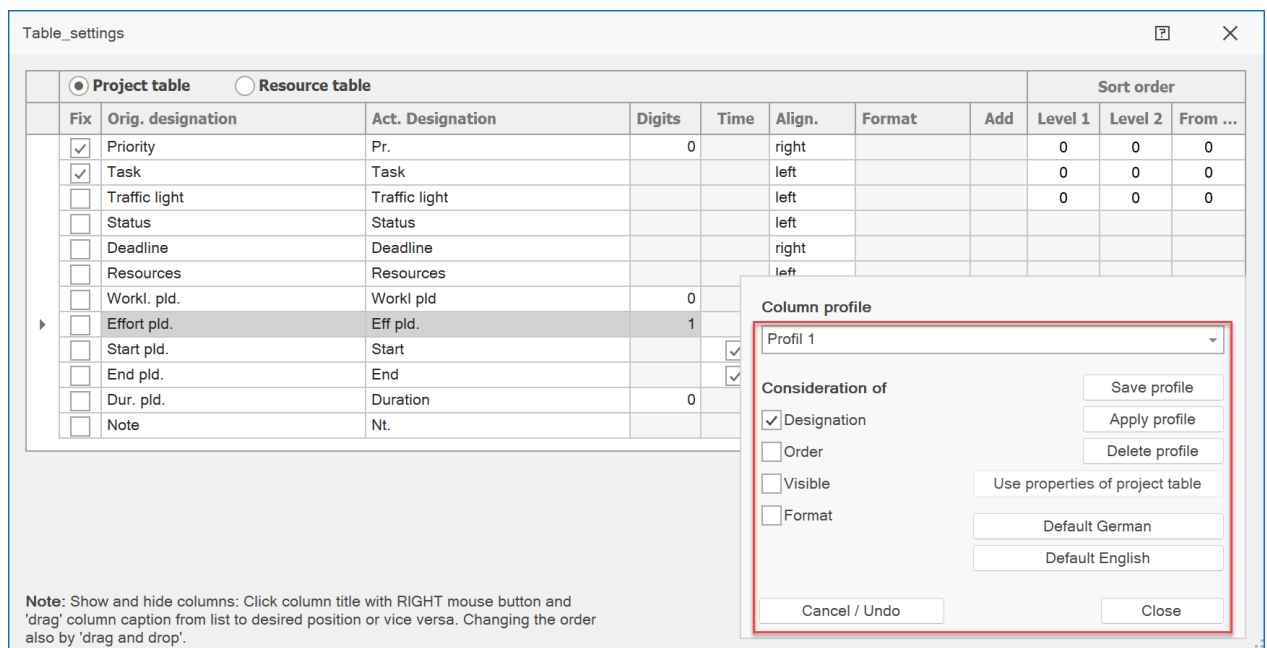
Column settings can be saved in separate column profiles in A-Plan X as of 09/23, so that these settings can be transferred relatively easily to other general profiles (see "Working with profiles" on page 128).

Analogous to the general profiles, both personal profiles and global profiles can be created:



Global profiles are also available to all users but can only be created or changed with master rights (see "Master, Admin" on page 147). Global profiles always begin with a "+".

The following actions are possible:



Save profile

The properties selected under **consideration of** are saved in the selected column profile. If it does not yet exist, it will be newly created.

Apply profile

The properties selected under **consideration of** are taken over from the selected column profile for the current column settings.

Delete profile

The selected column profile is deleted.

Take over from project table

When the settings of the resource table are visible, they are transferred to the resource table, taking into account the selected properties of the project table.

Default German

The properties selected under **consideration of** are overwritten with the German default settings given by A-Plan:

Act. Designation	Digits	Time	Align.	Format	Add	Level 1	Level 2	From ...
Pr.	0		right			0	0	0
Vorgang			left			0	0	0
Ampel			left			0	0	0
Status			left					
Termin			right					
Ressourcen			left					
Ausl gepl	0							
Aufw gepl	1							
Beginn		<input checked="" type="checkbox"/>						
Ende		<input checked="" type="checkbox"/>						
Dauer	0							
Nz.								

with RIGHT mouse button and
or vice versa. Changing the order

Column profile

Profil 1

Consideration of

☒ Designation

☐ Order

☐ Visible

☐ Format

Save profile

Apply profile

Delete profile

Use properties of project table

Default German

Default English

Cancel / Undo

Close

Default English

The properties selected under **consideration of** are overwritten with the English default settings given by A-Plan.

Traffic light, Status and Deadline

With the help of the **Traffic light**, **Status** and **Deadline** columns, it is possible to see at a glance which projects / tasks are due for processing, where problems exist or are to be expected and which things require special attention.

In addition, this **Status** column displays information about special features of the projects / tasks, for example, whether they are locked, read-only, or a template or alarm is set.

Task	Traffic light	Status	Deadline
[-] Examples (2)			6.0 d ▾
[-] E-Business integration (6)			6.0 d ▾
[-] Project 2 (4)			24.0 d ▾
Milestones			24.0 d ▾
[+] Task 1 (3)			
[+] Task 2 (3)			99.0 d ▾

The **Traffic light** symbols summarize critical conditions and thus make it possible to very quickly identify the projects or processes that require special attention.







The **Status** and **Deadline** columns show the details.

Milestones			
[+] Task 1 (3)			
[+] Task 2 (3)			
[-] Task 3 (3)			
[+] Task 31 (1)			

The meaning of the icons is displayed when the mouse arrow is on an icon.

Symbols of the status column

- Completed
- Completion time has passed (and process was not marked as 'Completed')
- One of the limits is exceeded (see "Limits" on page 63)
- Passive project / passive activity (see "Passive and cancelled projects" on page 40)
- Cancelled project / cancelled activity (see "Passive and cancelled projects" on page 40)
- Template reached or exceeded (see "**Fehler! Verweisquelle konnte nicht gefunden werden.**" on page **Fehler! Textmarke nicht definiert.**)
- "Memory arrow" "*"
- "Question mark" "*"
- "Critical" "*"
- Full authorization is available for the row, including all subordinate ones (see "Project permissions" on page 150)
- For the row, incl. all subordinated ones, only modification rights are available

- (insertion or deletion is not possible) (see "Project permissions" on page 150)
-  Read-only permissions are available for the row, including all subordinate ones (see "Project permissions" on page 150)
-  Row is locked (see "Time bar lock" on page 50)
-  Row has administrator lock (see "Time bar lock" on page 50)
-  At least 10% too little capacity planned (see "Automatic adjustments" on page 93)
-  At least 10% too much capacity planned (see "Automatic adjustments" on page 93)
-  Do not apply set filters to this row**









* The labels can be switched on or off in the **Data Table** tab or after clicking the relevant row with the right mouse button in the **context menu**.

** The function can be switched on or off in the Data table tab or after clicking the relevant row with the right mouse button in the context menu. It causes selected rows to be always displayed, i.e. even if the row does not meet active filter settings (see "Filter, Search" on page 72).

Symbols of the appointment column

The **Deadline** column shows how much time is left until the first unfinished time bar in the current row begins or ends. Exceeded deadlines are displayed as "negative remaining time" in red color.

Weekends and holidays are also taken into account in the same way as the duration is calculated.

- 12 T  Planned (start is in the future)
-  15 T In process, more than a week to deadline
-  3 T In process, less than a week to deadline
-  0 T In progress, deadline Today
-  - 3 T Deadline exceeded
-  Completed
-  Passive (see "Passive and cancelled projects" on page 40)
-  Cancelled (see "Passive and cancelled projects" on page 40)

Explanation:

A duration to the left of the icon refers to the start, a duration to the right of the icon refers to the end of the project / task.

If the column width has been set to be too narrow, only the symbols will be displayed without specifying the duration.

Values in the **Deadline** column cannot be changed because they are calculated by A-Plan based on the position of the first unfinished time bar in the respective row.

Traffic light column symbols

Depending on the status, either green, yellow or red or no symbol is displayed in the traffic light column:

Green

In progress and none of the criteria listed under "Yellow" and "Red" present

Yellow

Critical (see "Symbols of the status column" on page 27)

Question mark (see "Symbols of the status column" on page 27)

Capacity more than 10 % too high (see "Automatic adjustments" on page 93)

Capacity between 10% and 30% too low (see "Automatic adjustments" on page 93)

Red

End date exceeded

Limit exceeded (see "Limits" on page 63)

Capacity more than 30% too low (see "Automatic adjustments" on page 93)

No traffic light

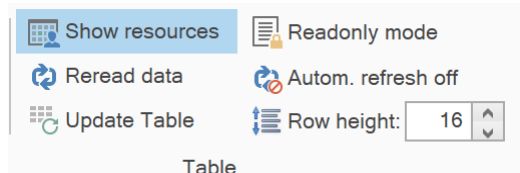
Not yet started and none of the criteria listed under "Yellow" and "Red" are present

Done

Passive (see "Passive and cancelled projects" on page 40)

Cancelled (see "Passive and cancelled projects" on page 40)

Table



Show resources

In the lower half of A-Plan, resources are displayed with their workloads and assigned tasks.

Reread data

The currently visible data is completely re-read from the database.

Update Table

Data that has changed since the last - automatic - update is read in again. This can be useful if you do not want to wait the default time of 30 seconds until changes by other users are visible in the table.

Readonly mode

Can be enabled to prevent accidental changes when viewing or presenting plans.

Autom. refresh off

If you want to prevent changes by other users from updating the display every 30 seconds when entering or changing extensive data, you can activate this option. However, this is only necessary or useful if a large number of users are working on the database at the same time.

After deactivating the option, all data will be read in again, so that changes made by other users will also be visible.

Note:

This option should not be activated if you are working on the same data together with other users, as their entries will otherwise not be visible on your own computer. In principle, however, it is not advisable for several users to work on the same data at the same time.

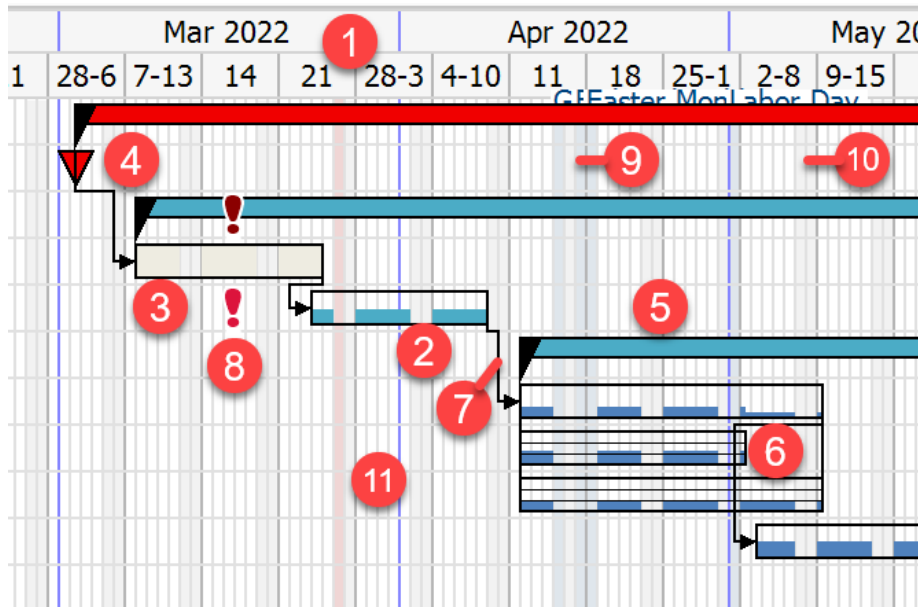
Row height

If a row height other than the default setting (= 16) is required, e.g. for a printout, it can be set here. The minimum is 14.

Gantt chart

Elements and symbols of the Gantt chart

The Gantt chart is a calendar in landscape format, where the date or time can be read in the title bar **(1)**:



The Gantt chart contains the following elements:

The time sequences of the projects are displayed in the form of **time bars**, whose length corresponds to the duration of the respective activity **(2)**. Areas with colored fill patterns indicate processing times, light gray areas indicate non-working times, such as week-ends. The display of non-working times can also be switched off (see "Time bar" on page 112).

The **colors of the time bars** in the Gantt chart depend by default on the priority of the of the respective row (e.g. priority 1 = red, 2 = yellow, 3 = green, etc.). are either displayed in gray **(3)** or crossed out. Individual colors and patterns are also possible (see "Colors / Patterns" on page 51).

Milestones (4) are time bars with a duration = 0 and are represented as triangles. They can be used to represent points in time, such as a deadline.

Time bars that serve as a **summary** (= "heading", see "Heading rows" on page 39) are displayed at half height and with black triangles at their ends **(5)**.

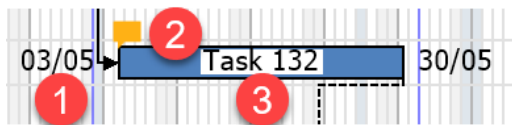
Resource time bars (6) are marked by 2 additional horizontal lines and document the processing times of the resources (see "What does A-Plan resource planning look like?" on page 83)

Links (7) establish dependencies between the time bars (see "Link time bars" on page 54).

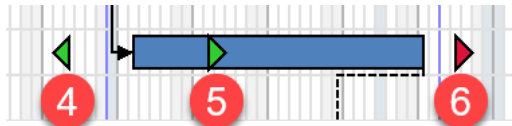
Exclamation marks **(8)** stand for **remaining dates** (for meaning see "**Fehler! Verweisquelle konnte nicht gefunden werden.**" on page **Fehler! Textmarke nicht definiert.**).

Holidays are highlighted in dark gray by default **(9)** (see "Gantt chart" on page 111), **weekends** light gray **(10)** and the **current day** light red **(11)**.

Time bar (details)



Planning status



Limits

Start or end as date value **(1)** (see "Time bar" on page 112)

Note (2) (see "Note" on page 53)

Designation / resource (3) (see "Time bar" on page 112)

Earliest start (4) (see "Limits" on page 63)

Latest start (5) (see "Limits" on page 63)

Latest end (6) (see "Limits" on page 63)

Start/End time

9.	10.	11.	12.	13.
12:00	14:00			
	08:30	10:30		
		13:00	16:00	
	14:00			

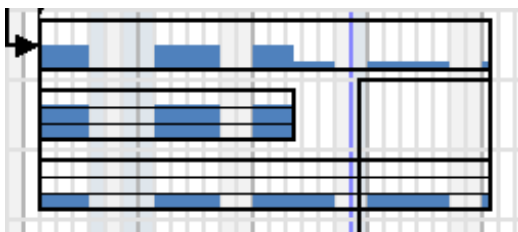
Before or after the time bars, the beginning or the end of the time bar can be displayed as a numerical value in different formats.

Since the beginning and end of milestones (here: "Planning") are the same, only one value is displayed in this case.

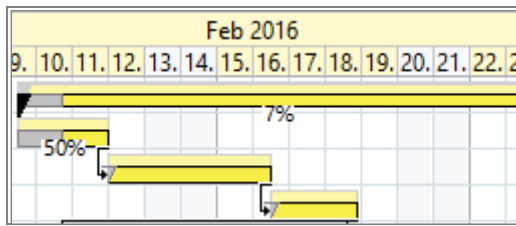
The **format of the time points** can be set in the **options** under **View / Time bars**.

Display working times and capacities in the task time bars

The time bars of the tasks can optionally be displayed so that they are only provided with a filling pattern in the areas in which the scheduled resources actually process the respective task with which capacity:



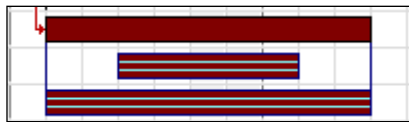
Completed in %



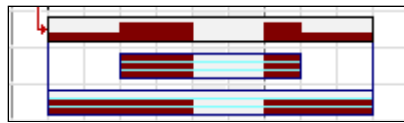
Display of the actual time bars with the completion percentage.

Display of the workload in the time bars

Optionally, the filling pattern of the time bars can be displayed in such a way that it is interrupted at non-working or unoccupied times and the respective existing workload can be read off from the height of the filling pattern.



without display of working hours



with display of working hours

This type of view can be switched on or off using the **Workload** option in the **View** tab or in the **options** under **Screen display** and **Printer display in the Time bar** dialog box.

Scrolling through the time bars

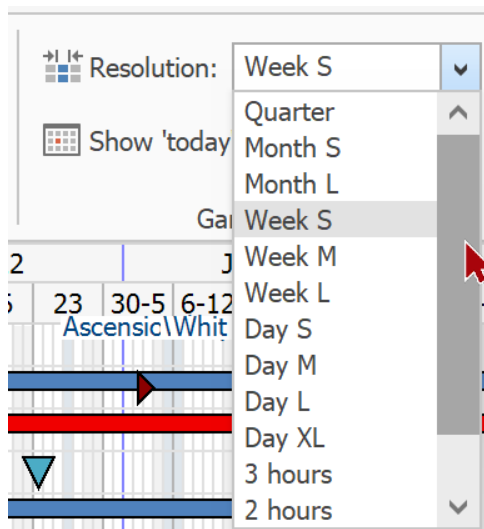


By clicking on the two inner arrows on the left below the scroll bar, you can scroll through the time bars of the current row.

In the field between the arrows, the sequential number of the current time bar is displayed on the left and the number of time bars in the marked row on the right. is displayed in the marked row.

This function is especially useful when there is a larger number of time bars in a row, you do not know exactly where a particular time bar is located, or if one time bar is hidden under another.

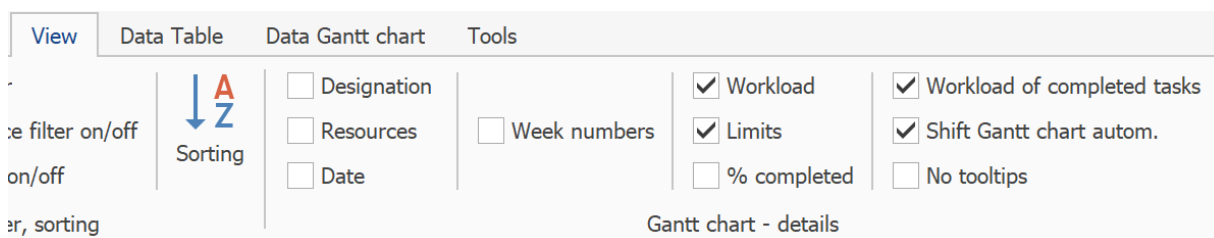
Resolution of the Gantt chart



The resolution of the Gantt chart can be set using the list box on the right above the Gantt chart so that several years are visible at the coarsest resolution and only a few hours at the finest.

Gantt chart - details

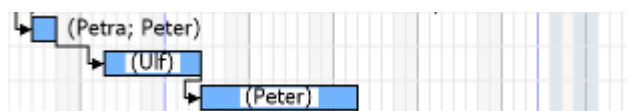
In the **View** menu you can set which details should be displayed in the Gantt chart:



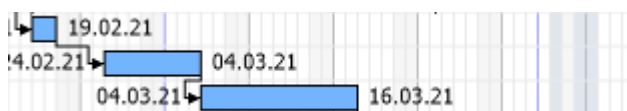
Designation



Resources



Date

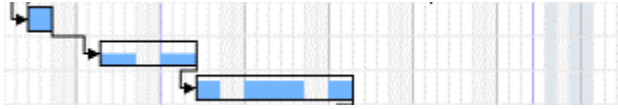


The concrete display of **designation**, **resources** and **date** can be set in the options (see Time bar on page 112).

Week numbers

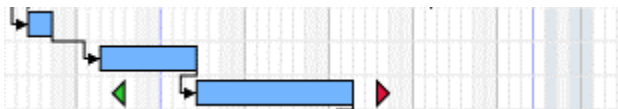
Mar 2022				
9	10	11	12	13

Workload

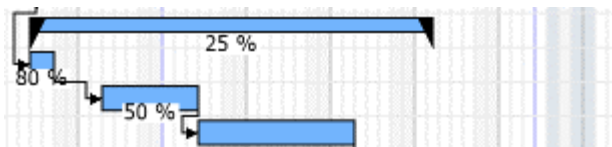


The time bars are filled with color only up to the level of the current workload, weekends also remain empty if they are free of work.

Limits



% completed



Workload of completed tasks

Resource/Task	Traffic light	Status	Mar 2022		
			10	11	12
Internal staff (3)		☀			
Stevens (8)					
Task 11	●	✓			
Task 12	●	!			

Workload of completed tasks is no longer taken into account / displayed.

Resource/Task	Traffic light	Status	Mar 2022		
			10	11	12
Internal staff (3)		☀			
Stevens (8)					
Task 11	●	✓			
Task 12	●	!			

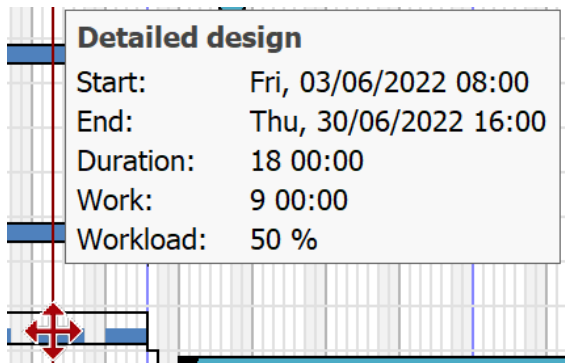
Workload of completed tasks is still taken into account / displayed.

Shift Gantt chart autom.

After clicking on the indicator column (on the far left) or on the name of a task, the Gantt chart is moved so that the associated time bar is then in the visible area.

No tooltips

By default, information about the time bar below the mouse pointer is displayed:



If this is not desired, this display can be switched off.

ENTER AND CHANGE DATA

GENERAL NOTES , DATABASE

This section describes all the functions that A-Plan provides you with for entering, changing and deleting data.

Organization of data (database)

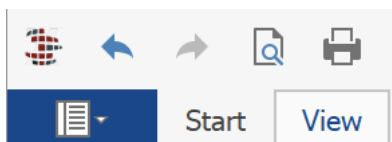
Unlike many other programs, A-Plan does not use "normal" files, but **databases**. Among other things, this has the advantage that a larger number of projects can be stored in a central database, cross-project resource planning is possible and - as the most important advantage - **several users** can access the data **simultaneously**.

Note:

In a database, **all entries** are **saved immediately**, as this is the only way to ensure that several users can access the same data simultaneously and smoothly. Therefore, **no manual saving is necessary!**

database **UNDO CHANGES ("UNDO"/"REDO")**

New entries or changes can be undone and then also restored ("Undo"/"Redo"). Complex changes, such as deleting, moving or downgrading complete folders, date changes for linked time bars, etc., are also taken into account here.



The "Undo"/"Redo" function is activated by pressing the two blue arrows in the quick access bar.

CREATE PROJECTS AND TASKS

Create

New rows can be inserted either in the **Data Table** tab or after clicking on an existing row with the right mouse button. In this case, the new row is either inserted below the currently selected row or - if no row is selected (or an empty database is present) - placed at the beginning of the table.

A new row can be created either "relatively" - i.e. at a **higher, same** or **lower level** - or "absolutely" by specifying the desired level:

The screenshot shows the 'Data Table' tab selected. The 'New row' dropdown menu is open, displaying options for inserting rows at different levels. The 'Lower' option is highlighted, and the 'Level 4' option is selected, with a red arrow pointing to it. The 'Level 4' option is highlighted in blue, and the 'Level 5' option is also visible. The 'Level 4' option is highlighted in blue, and the 'Level 5' option is also visible. The 'Level 4' option is highlighted in blue, and the 'Level 5' option is also visible.

Level	Task	Key Combination
1	more examples: File/Open...	
1	Examples (2)	
2	E-Business integration (6)	
3	Milestones	
3	Processes (4)	
4	Identify departments (1)	
4	Determine contact person.	
4	Identify processes (1)	
Level 4		Ctrl+F4
Level 5		Ctrl+F5

Note:

It is not possible to omit levels, e.g. to let a row of level 5 follow a row of level 3!

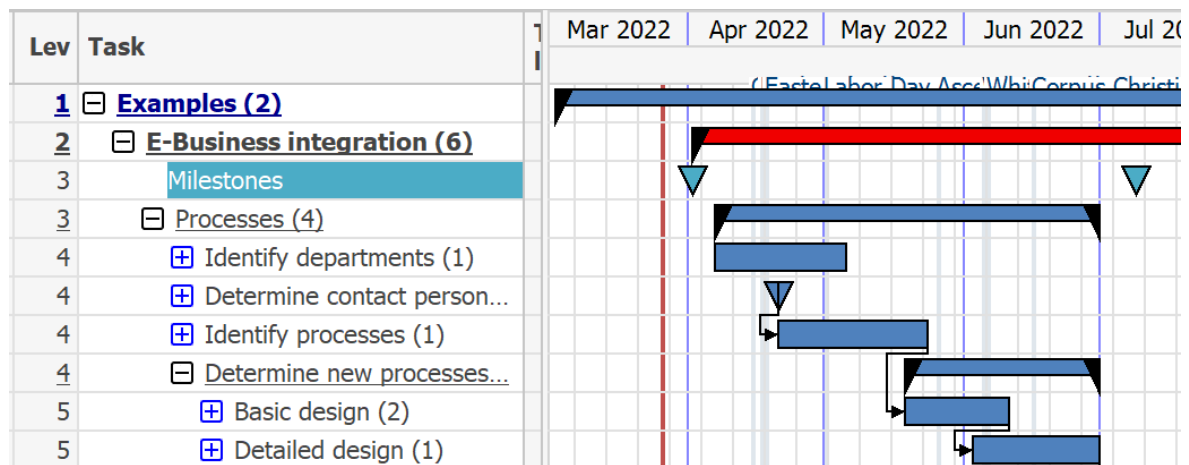
The screenshot shows the 'Data Table' tab selected. The 'New row' dropdown menu is open, displaying options for inserting rows at different levels. The 'Lower' option is highlighted, and the 'Level 4' option is selected, with a red arrow pointing to it. The 'Level 4' option is highlighted in blue, and the 'Level 5' option is also visible. The 'Level 4' option is highlighted in blue, and the 'Level 5' option is also visible.

Level	Task	Key Combination
1	more examples: File/Open...	
1	Examples (2)	
2	E-Business integration (6)	
3	Milestones	
3	Processes (4)	
4	Identify departments (1)	
4	Determine contact person.	
4	Identify processes (1)	
Level 4		Ctrl+F4
Level 5		Ctrl+F5

The fastest way to insert new rows is to use the available key combinations, e.g. **Shift+F3** if a new row is to be inserted as a subitem of the current row. In this case it is also not necessary to close the field with the last entry by pressing the ENTER key.

Heading rows

Folder rows (= 1st outline level, see "Structure (folders, projects, tasks) " on page 16) always serve as a heading or summary of all projects or tasks that are located in the folder.



The time bar in the "Examples" row therefore ranges from the start of the first project in this folder until the end of the last project.

All other rows, i.e. from level 2 onwards, are displayed either as headings or as independent rows, depending on whether sub-items are present or not.

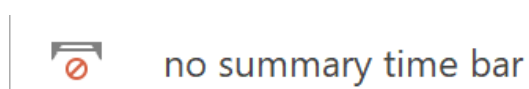
If sub-items are entered below a stand-alone row, this row is automatically converted into a heading, after deleting all sub-items back into a stand-alone row. Time bars of heading rows are provided with black triangles at the beginning and at the end, furthermore they are displayed only with half height.

In addition, heading rows are displayed with underlined labels to distinguish them from independent rows, and ...

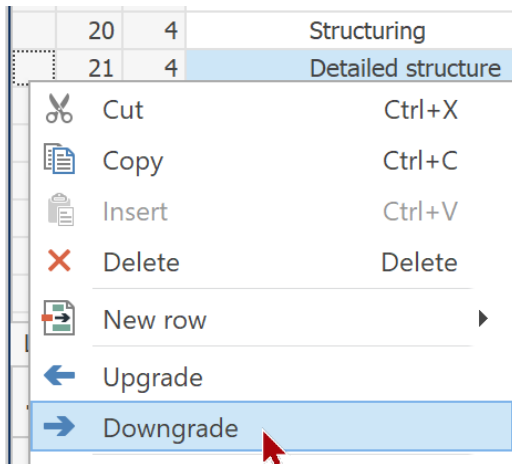
<input type="checkbox"/> <u>E-Business integration (6)</u>	●		5.0 d		24 %	143.8 wd
<input type="checkbox"/> Milestones	●		5.0 d		100 %	0.0 wd
<input type="checkbox"/> Processes (4)	●		8.0 d		35 %	31.8 wd
<input checked="" type="checkbox"/> Identify departments (1)	●	⚡	8.0 d	Miller (20.0)	20 %	3.8 wd
<input checked="" type="checkbox"/> Determine contact person...	●	?	16.0 d	Stevens (40.0)	100 %	0.0 wd
<input checked="" type="checkbox"/> Identify processes (1)	●		16.0 d	Stevens (50.0)	50 %	11.5 wd
<input type="checkbox"/> Determine new processes...	●		36.0 d		34 %	16.5 wd
<input checked="" type="checkbox"/> Basic design (2)	●		36.0 d	Schulz (30.0)...	25 %	7.5 wd
<input checked="" type="checkbox"/> Detailed design (1)	●		46.0 d	Miller (50.0)	50 %	9.0 wd
<input type="checkbox"/> Topics, contents (4)	●		65.0 d		28 %	11.8 wd

... costs, effort etc. of the underlying rows are added up.

If the **heading time bar is not to be displayed**, it can be hidden by clicking on the relevant row with the right mouse button in the popup menu:



Step up and step down



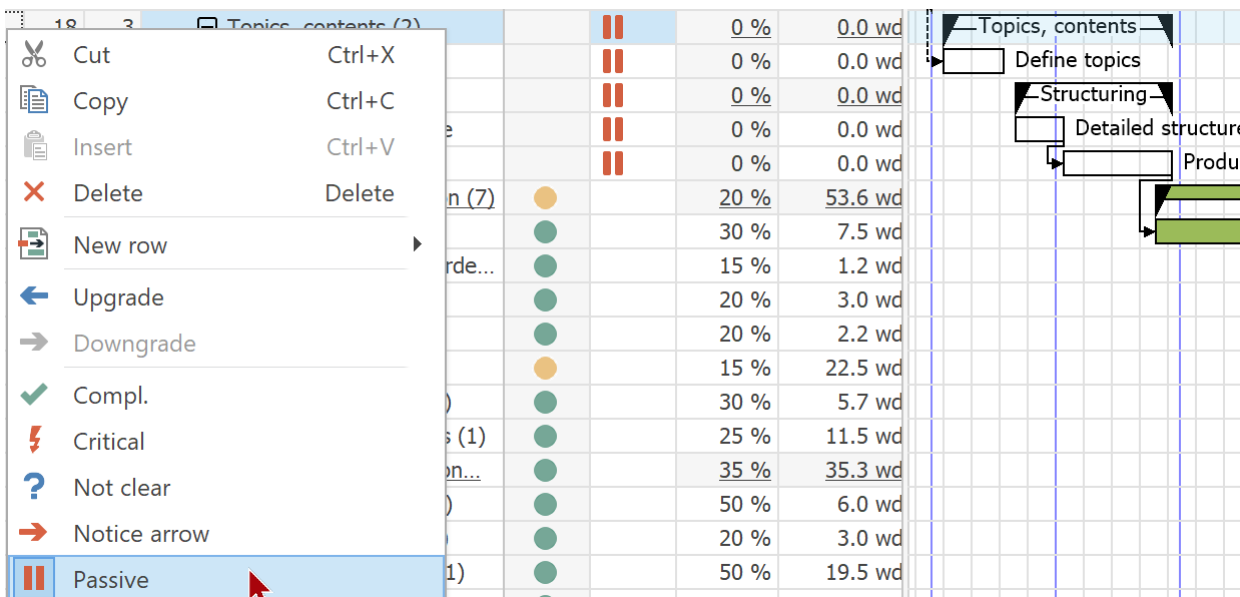
The level of a row can be stepped up or down by selecting the desired row and choosing the corresponding function in the **Data Table** tab.

These functions are also available after clicking a row with the right mouse button.

Several rows can also be stepped up or down at the same time if they have been marked beforehand.

4	Structuring (1)
5	Detailed structure
4	Product selection

Passive and cancelled projects



Passive projects are, for example, projects whose commissioning or scheduling is not yet certain. They are not taken into account for effort and costs and thus serve as placeholders. In contrast to the **deleted projects**, they are displayed in the resource view.

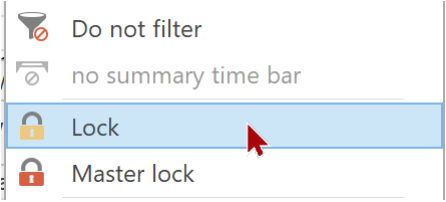
Cancelled projects are projects that should not be executed, but should remain for documentation purposes. Effort and costs are not considered for them either, they are not displayed in the resource view.

Individual tasks can also be set **passive** or **deleted**.

Via the date selection (see figure above) passive or deleted projects can be excluded from the display or printout.

Lock rows

If individual rows are to be protected against accidental changes (e.g. if there is an irrevocable delivery date in the row concerned, etc.), they can be locked for changes by clicking the left or the **status column of** the row with the right mouse button and selecting **Lock**:



'Master' lock

The lock can normally be released by any user who has change rights for the affected row. For this reason, the multi-user version for users with master rights "(see "**Create users**" on page 146), it is possible to set a **'master' lock which can** only be released again with master rights.

+	Install hotline (1)	●	🔒
+	Search engine registration (1)	●	🔒
+	...	●	🔒

Locked rows are indicated in the status column by a yellow lock (simple lock) or a red lock ('master' lock).

ENTER, CHANGE DATA

Data change

[-] Project 2 (4)	●	👤!	48 %	93.9 wd	▲ 50.00 \$/d
Milestones	●	⚡!	100 %	2.0 wd	50.00 \$/d
[-] Task 1 (3)	●	👤!	61 %	59.0 wd	▲ 50.00 \$/d
[+] Task 11 (2)	●	✓	100 %	26.0 wd	50.00 \$/d
[+] Task 12 (2)	●	!	45 %	10.6 wd	50.00 \$/d
[-] Task 13 (4)	●	👤	48 %	22.4 wd	▲ 50.00 \$/d

Depending on the content, the cells in the main table of A-Plan are displayed with different background colors.

Cells whose content can be changed are **white**.

Cells whose content cannot be changed are **gray**.

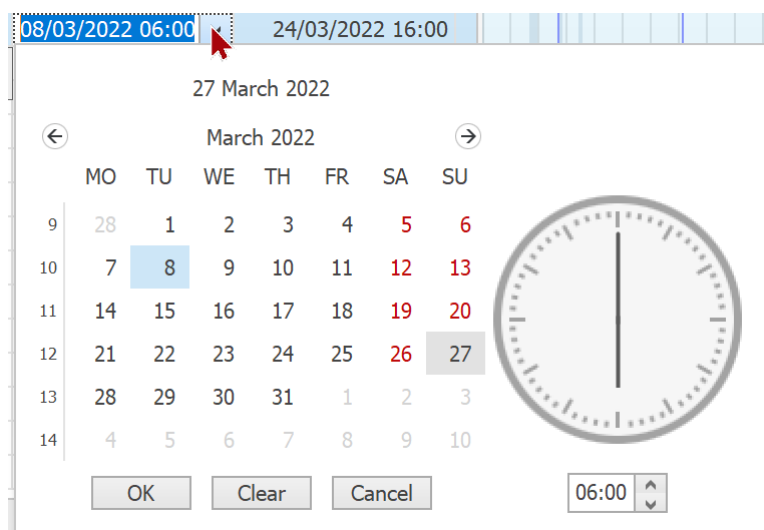
Cells whose content was taken from the assigned resource are **light blue**. If different values were entered, the cell is **white**.

After **selecting a cell** by clicking with the **right mouse button** or navigating with the arrow or tab keys, the current value can either be **overwritten directly** or changed using further input helpers.

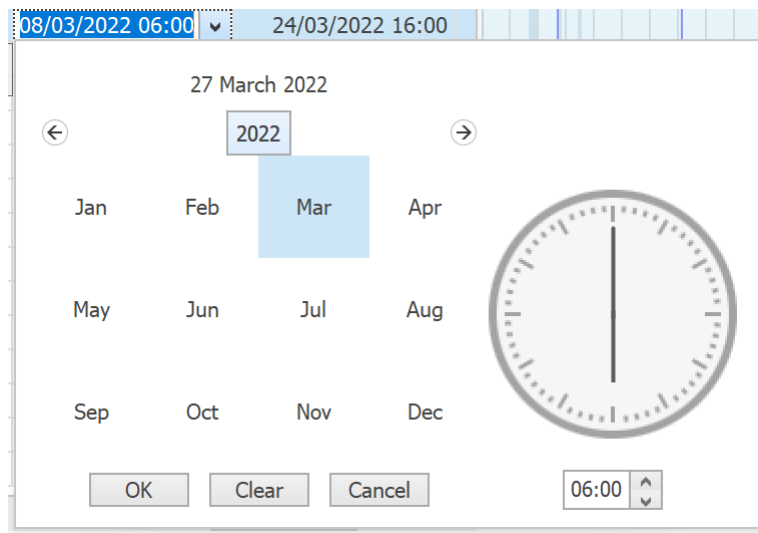
Pressing the ENTER key or selecting another cell will save the new value, pressing the ESC key will cancel the task.

Multiple selection when entering values in fields

If an identical value is to be entered in several fields at the same time, they can be marked by holding down the CTRL or SHIFT key and then entering the desired value in the field last clicked on with the **right mouse button**.



Clicking the date with the **right mouse button** or clicking the down arrow opens a calendar for entering the time.



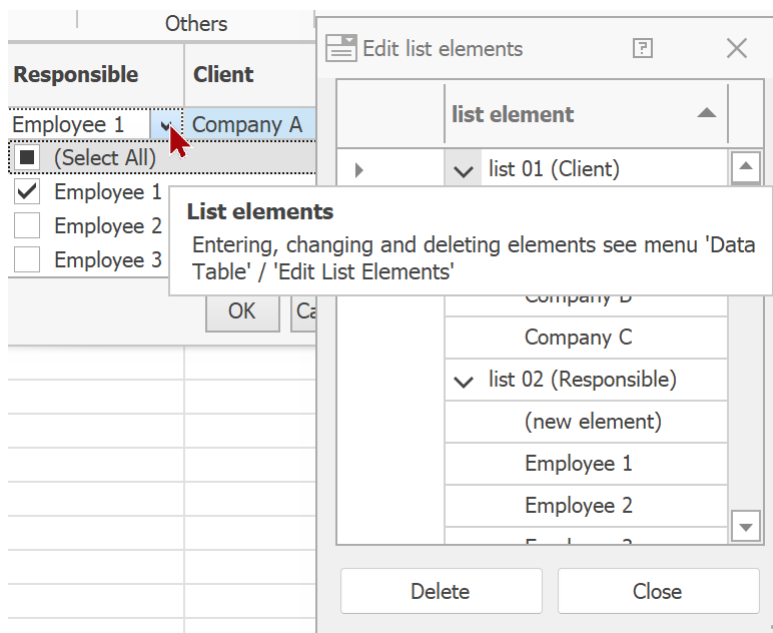
After clicking on the month above the calendar, the view changes to years and months, so that even major date changes can be made relatively quickly.

Hint:

The clock or time setting will not be displayed if whole days have been set as the time grid (see "Time grid" on page 119).

List fields

There are a total of 10 user defined list fields, the selection of which can be defined so that only certain entries are possible:



The name of the columns can be defined as desired (see Name of the column (current name) on page 19), the allowed selection for each list field can be defined in the menu **Data Table / Edit list elements**.

Links to other files/objects (Hyperlinks)

General notes

Hyperlink 1
C:\Temp\Datei 1.docx
C:\Temp\Datei 2.xls
C:\Temp\Datei 3.txt
https://www.braintool.com/
C:\Temp

Each row can be linked to any external file, Internet address or Windows directory.

Insert of a link

Insert by drag & drop

An object can be linked by drag & drop or by copy & paste of the address.

To link via drag & drop, open Windows Explorer next to A-Plan and drag the desired file onto the appropriate field of A-Plan.

If there is already a link at the target position, it will be replaced by the new one. If several links are required for one task, up to 5 columns are available for this purpose.

Sending emails

It is possible to send emails directly from A-Plan. For this purpose, there is an **Email** column in which one or more email recipients can be entered. If resources are assigned, the e-mail addresses stored for the resources are used by default (**Email to** column).

In order to be able to send emails, a sender address must be entered once in the options (see "Startup behavior / Email" on page 117).

Status	Email	Resources	Nt
	martina@firma.de ; peter@firma.de	Peter (100,0); Petra (...)	05.07.2022, SJ: ...
	Send email ? ✕		
	Email to:	martina@firma.de ; peter@firma.de	
	Subject:	Grobenwurf (Kundenprojekte > Car Prototype > Konstruktion)	
	Folder:	Kundenprojekte	
	Project:	Car Prototype	
	Task :	Grobenwurf (Konstruktion)	
	Start:	13.08.2022 12:00	
	End:	08.11.2022 16:00	
	Status :	Too much capacity; requiring clarification	
	Comment:		
	Note:	05.07.2022, SJ: Mit Kunde noch Absatz 13.1 aus Pflichtenheft abstimmen	
	<input checked="" type="checkbox"/> incl. Note Send Close		

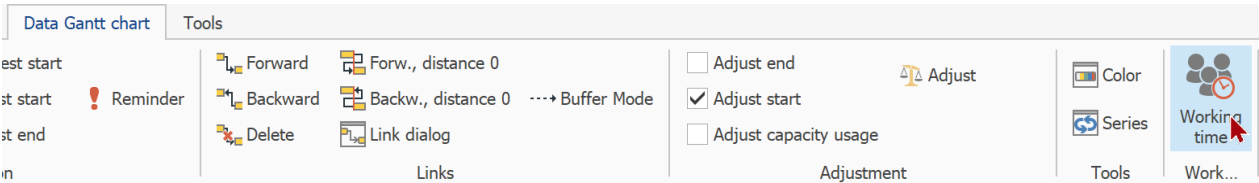
If the entered email recipients are to be informed about the current status of a process, the email address only has to be clicked with the right mouse button to open the message window, which then already contains the most important information about the process. Data that has been changed since the last email is marked with an "*" and additional comments can be added.

Automatic sending of emails was deliberately not implemented, as there is a high risk that emails will be sent even if this is not desired (e.g. because changes have not yet been completed or have only been made on a trial basis, etc.). This is to avoid that A-Plan increases the flood of emails and that, as a result, emails sent from A-Plan are no longer considered.

TIME BAR (GANTT CHART)

Time bar, working hours, standard calendar

The dialog window for setting the working times is located in the **Gantt chart data tab**:



Note:
If you have set **1 day** as the **time grid** (see "Time grid" on 119), only the days on which work is performed play a role in the working times.

The working times required for calculating the duration of tasks are set in the top calendar called **Standard**.

Calendar	with effort	Holidays active	Start	End	Dur.	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17
<input checked="" type="checkbox"/> Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			40.00 h																		
Monday			08:00	16:00	8.00 h																		
Tuesday			08:00	16:00	8.00 h																		
Wednesday			08:00	16:00	8.00 h																		
Thursday			08:00	16:00	8.00 h																		
Friday			08:00	16:00	8.00 h																		
Saturday																							
Sunday																							

If necessary, you can change the working times by moving the beginning or end of the time bars with the left mouse button pressed.

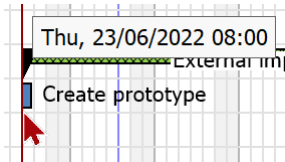
You can return to the normal view of A-Plan by clicking the **Close working times** button.

Notes:
All working days of the standard calendar must have the **same duration**! So if, for example, work is done from Monday to Thursday until 16:00 and on Friday only until 14:00, enter for the standard calendar also for Friday 16:00. Additional calendars can therefore be used for **effort** and **cost calculations**, which can then also be provided with any working times.

For more details, see "Create resource calendar" on page 85.

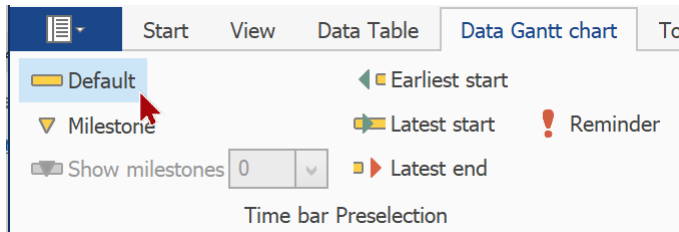
Enter new time bar

Move the mouse pointer in the Gantt chart to the position where you want the new time bar to start. should begin. Double-click the left mouse button to create a new time bar:





The length of the time bar here depends on the set default value (see "Length of time bar" on page 113).

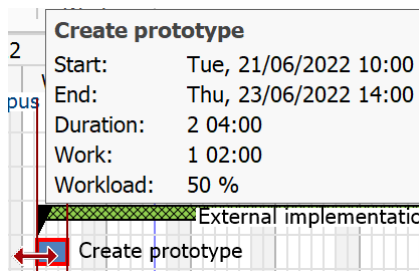
Note that the **Default** option must be active for the **time bar preselection**:



Setting the start, end or position of a time bar with the mouse

The start, end or position of the time bar can be changed by "dragging" (hold down the left mouse button). To do this, hold down the left mouse button over the start or end () or center of the time bar () and drag the mouse arrow to the desired position.


If the shift key is pressed during moving, a time bar can also be moved to another row.



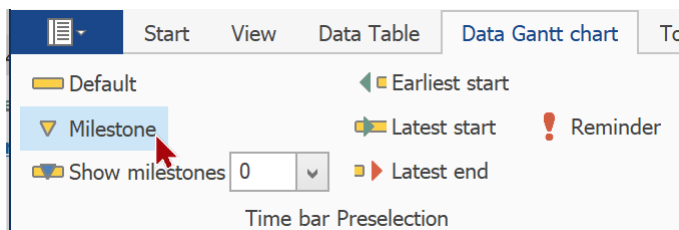
In the position field of the mouse pointer the current values for start, end and duration are displayed. If resources have been assigned, additionally the effort and if a required effort has been defined (see "Required effort" on page 92), the effort deviation in percent.

The new value is accepted by releasing the left mouse button. The process can be aborted at any time by pressing the ESC key.

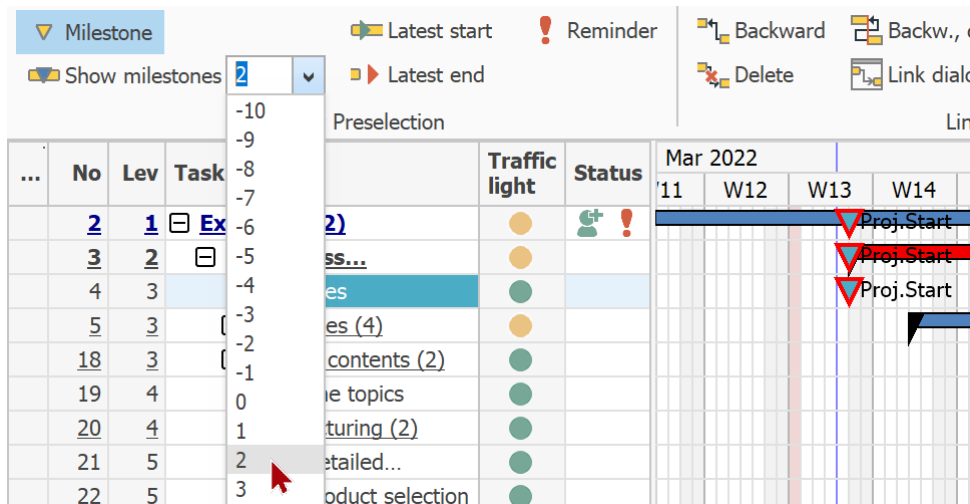
Milestone

If the length of the time bar is "0", it is displayed as a **milestone** () (see "Elements and symbols of the Gantt chart" on page 31).

You can also create a milestone directly by double-clicking on the desired position in the Gantt chart, if the corresponding preselection has been set beforehand:



Milestones that have been marked for this purpose are **also displayed in the superordinate levels**, so that they are also visible in closed projects or blocks:



Milestones are marked in the **Data Gantt chart** tab.

A number > 0 indicates the levels that should display the milestone, from **top to bottom**. A "2" therefore means that the milestone should be displayed in levels 1 and 2.

A number < 0 indicates the levels that should display the milestone, from **bottom to top**. A "-2" in this case means that the milestone should be displayed on the next 2 levels above. So if the milestone is on the 4th level, it should be displayed on levels 3 and 2.

A "0" does not indicate the milestone at any higher level.

Entering properties of the time bars via dialog box

After clicking on a time bar with the right mouse button, a dialog window appears in which all properties of the selected time bar are displayed and can be changed directly:

The dialog box 'Basic design' is shown, allowing modification of time bar properties. It includes sections for Designation / Note / Locks, Start / End, and Duration / Effort, with various input fields and checkboxes.

The dialog window can remain permanently open (and will then always display the properties of the currently selected time bar).

Designation of a time bar

By default, a time bar has the same name as the task to which it belongs. In addition to the possibility of changing the name in the properties dialog, a different name can also be entered by double-clicking on a time bar.

After pressing the ENTER key or clicking on another element, the text is displayed within the time bar or - if the length of the bar is too short - behind the time bar. If the labels of

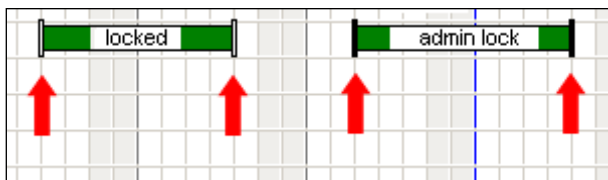
the time bars are not to be displayed temporarily, they can be changed in the options (see "Time bar" on page 112).

If the name of the task to which the time bar belongs is to be used again, delete the name of the time bar.

Time bar lock

In many projects there are deadlines that must not be exceeded, such as the delivery of a product to the customer or the start of a production. Such dates can be entered in A-Plan as **locked time bars**. To lock a time bar, click on it with the right mouse button and select **Locked in** the properties window.

If it is to be prevented that the lock can be removed by a "normal" user, a user with administrator rights (see "**Create users**" on page 146) can alternatively select the entry **Master lock**.

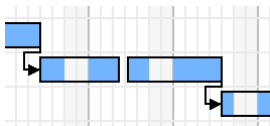


Locked time bars are delimited by vertical bars with white filling, time bars with "Administrator" lock are delimited by vertical bars with black filling.

How shifts within the project flow are possible despite locked time bars is described in chapter "Buffer times" on page 60 is described.

Separating time bars

By clicking on a time bar with the CTRL key held down at the desired separation point, a time bar can be separated so that the two new halves can then be edited independently of each other:

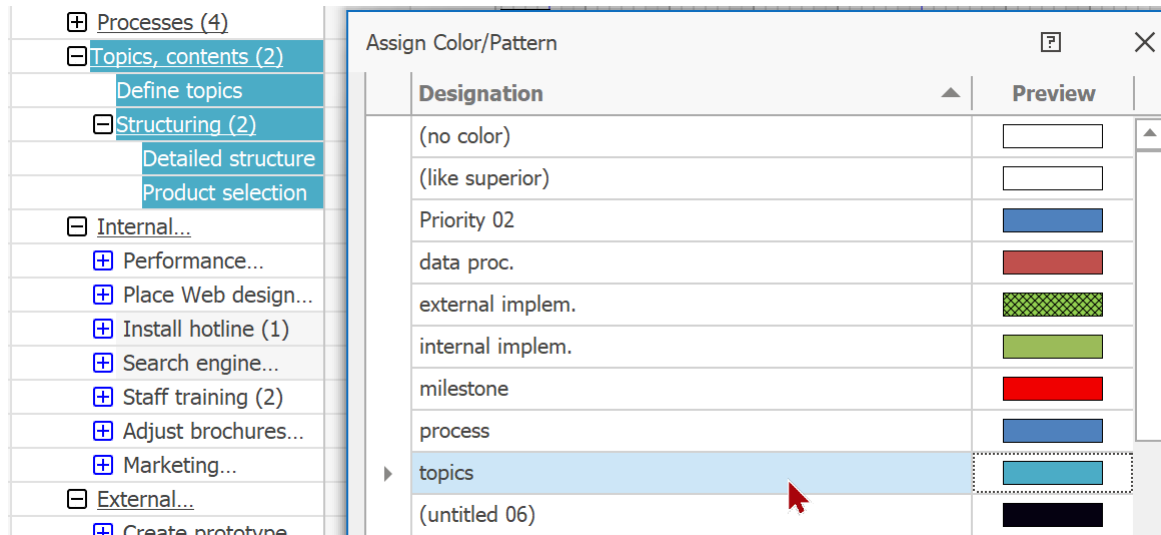


Completed time bars

If a time bar is completed, after clicking the time bar with the right mouse button and selecting the command **Completed**, the current time is entered as the completion date. Alternatively, the **Completed command can also be** used in the **context menu of** the row (click on the name with the right mouse button). If there are several time bars in one row, all of them will then be set to '**Completed**'.

Colors / Patterns

By pressing the **Color** button in the **Data Gantt Chart** tab or by **right-clicking** on the left (indicator) column, a dialog box opens that allows you to assign different color patterns to tasks and time bars:



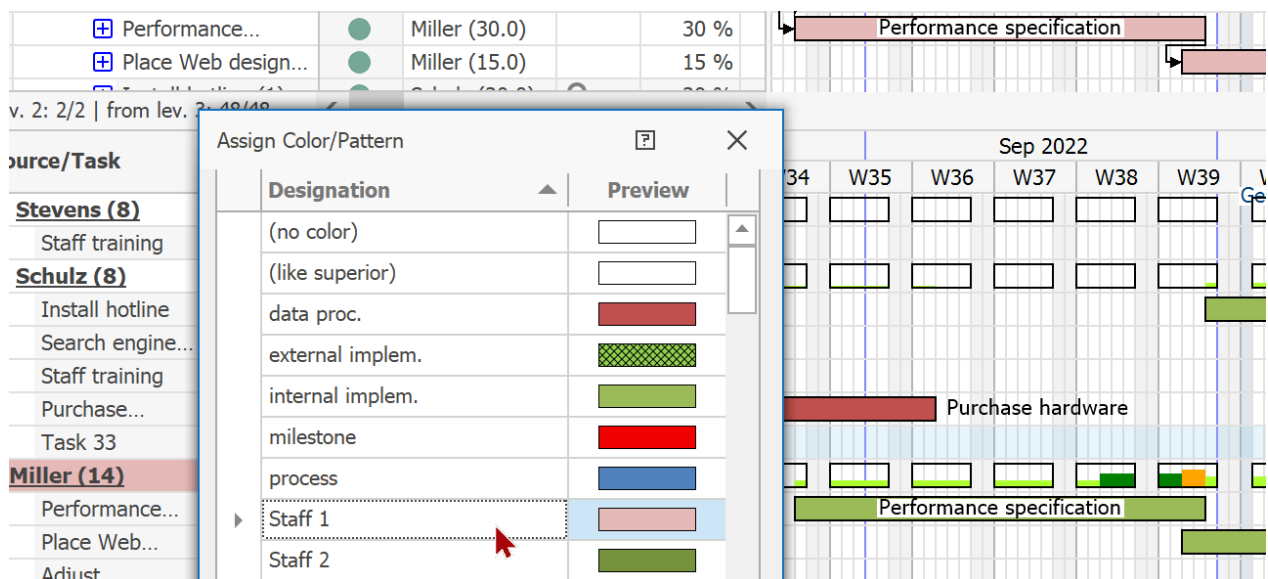
The assignment takes place depending on the definition below in the dialog window for a task, **time bar of** the task or **both**. Several rows can also be marked here. When a heading is assigned a color, the color is also applied to the subordinate tasks (**like superordinate**), **unless** they are given their own colors.

If **individual time bars** are marked, only these time bars are assigned a color.

The **Priority ...** entry causes the respective priority-dependent pattern to be used as color (see "Individual pattern" on page 120).

Resources or **resource groups** can also be assigned colors.

These are then also used for the time bars of the tasks to which the resources have been assigned:



However, this is **not** the case if **several resources** have been assigned to a task, because then no unique color can be used.

Reminder

With the **reminder function**, the display can be limited to the tasks that are pending for processing or that you want to be reminded of. A reminder is set by double-clicking the desired point in time in the Gantt chart while **Reminder** is activated at **Data Gantt chart**. This point in time can be recognized by the exclamation mark:

Task	Traffic light	Status	Mar 2022			
			W12	W13	W14	
Identify departments (1)						
Determine contact...						
Identify processes (1)						

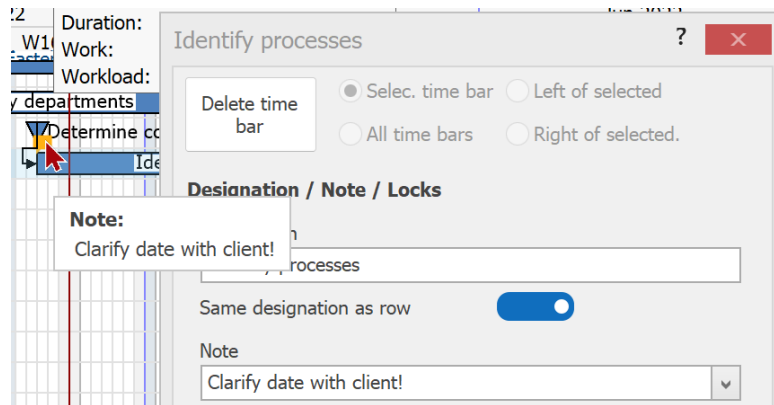
If the button with the exclamation mark is now active in **Status**, only those tasks are displayed whose **reminder date** is before or on today's **date** (highlighted in light red):

Start View Data Table Data Gantt chart Tools					
Default		Spec. print profile (No)		Deadline	
Profile		Deadline		Traf...	
Lev	Task	Traffic light	Status	Resources	Mar 2022
					W12 W13 W14 W
1	Examples (2)				
2	E-Business integration (6)				
3	Processes (4)				
4	Identify departments (1)			Miller (20.0)	
2	Project 2 (4)				
3	Milestones				
3	Task 1 (3)				
4	Task 12 (2)			Miller (40.0)...	

The reminder date in parent rows corresponds to the **earliest reminder date** of all subordinate tasks.

A reminder date can be deleted by deleting the date in the reminder column or after marking the exclamation mark and pressing the DEL key.

Note

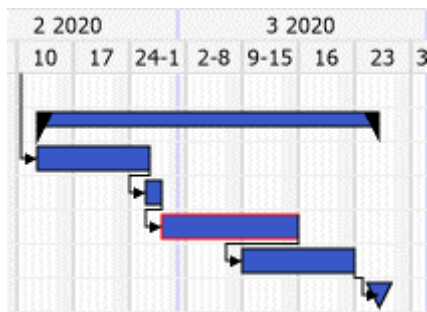


Each time bar, milestone, limit and reminder can be annotated with a note that becomes visible when the mouse cursor stays over the corresponding icon for more than approx. 0.5 s.

Enter or change: After clicking the desired element with the right mouse button, the note can be entered in the properties window. The note icon is removed when the text of the note is completely deleted.

Link time bars

In order not to have to manually move all time bars that are affected by the change when changes are made to the project, the **time bars** can be **can be linked to each other as desired**. For example, if the third of five linked tasks is moved by 2 weeks, the remaining two tasks are also automatically moved by 2 weeks.



Links are represented by rows, which are marked with arrows.

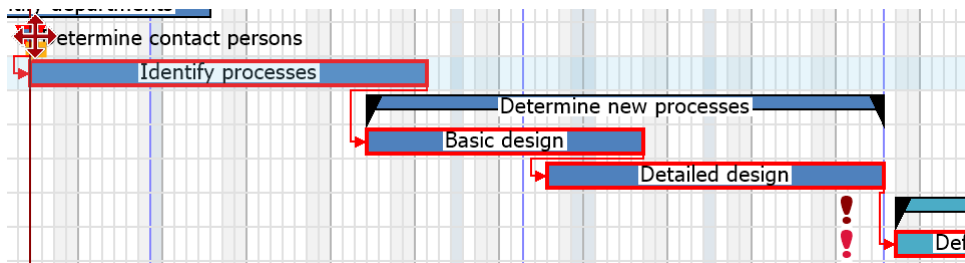
The time bar to which the arrow points is called the **successor**, and the one from which the arrow comes is called the **predecessor**.

The **distance between linked time bars remains constant** if one of the predecessors is moved or its duration changes. If a shortening of the distance should be allowed within certain limits, **buffer times** can be inserted between the time bars (see "Buffer times" on page 60).

If a time bar is to be shifted until the beginning of the next time bar before the next time bar is shifted, a **variable link** can be used.:



If a time bar is moved that is linked to other time bars, all affected time bars are marked red and moved synchronously with it:



Create / delete shortcut with the help of the mouse

The easiest way to create links is to select the **successor** and then clicking on the **predecessor** with the L-Key pressed.

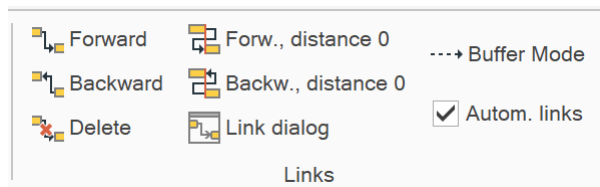
If the successor is to depend on the **end of the predecessor**, click the predecessor to the right of the center, if it is to depend on the **beginning of the predecessor**, click the predecessor to the left of the center.

Subsequently, you can also change the connection point for the **successor** by clicking on the left or right half. In this case, please make sure that the L-Key must still be pressed.

A **variable link** is created by pressing the **V-key** instead of the **L-key**.

If you click on link lines with the left mouse button, they will be marked (recognizable by the red color) and can then be **deleted** by pressing the DEL key.

Create several links at the same time (distance = "0")



In the **Data Gantt chart** tab there are several functions that can be used to **link all the time bars of the currently selected area forward or backward simultaneously**.

If the functions with **distance 0** are selected, the distance between the linked time bars is set to "0" in each case, i.e. the time bars concerned follow one another directly.

When you click the **Delete** button, **all the links of** the selected area will be deleted.

Links" column

In the column **Links** column, not only the dependencies on other tasks can be displayed, but it is also possible to enter or change them there directly:

Link
8ES
10ES-3.00d; 6ES+9.00d
13ES-5.00d
16ES+1.00d

The first number indicates the row of the predecessor and the type of link. The second one the distance between predecessor and successor in the dimension set in the duration options.

The type of link describes the respective position of the links at the predecessor and successor and has the following meanings:

- ES end - start
- SE start - end
- EE end - end

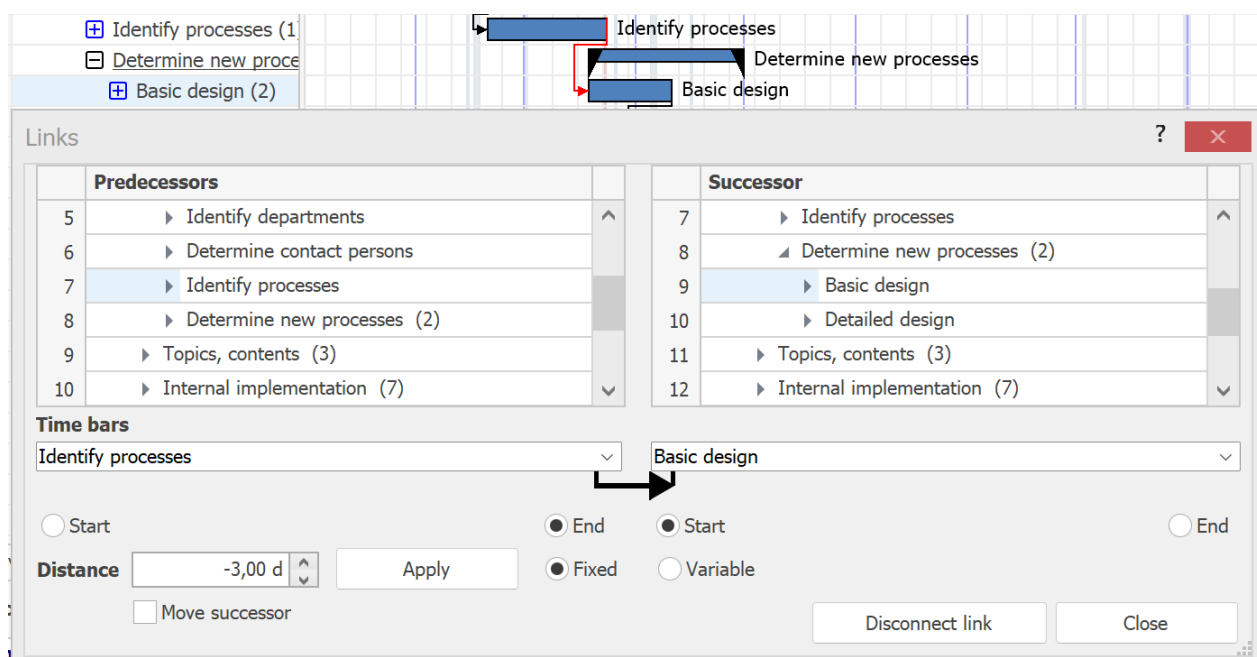
SS start - start

Link dialog box

If the **predecessor** is outside the visible area or the distance between the two time bars is to be set, it is possible to set the link in a special dialog window. It is opened by clicking the **Link dialog** button in the **Links** function group (see above).

Both lists show all folders, projects and tasks that are currently in the main window of A-Plan.

The time bars are displayed below in separate lists so that the desired predecessor or successor can be specified in one row even if there are several time bars. In this case the time bars are numbered consecutively in the respective list as well as in the main window of A-Plan:

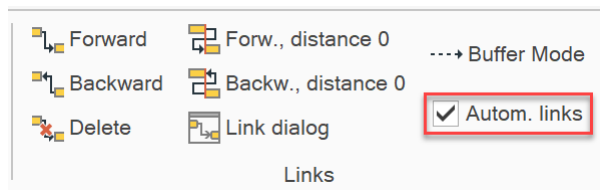


Predecessors and successors can also be selected by clicking on the time bars in the Gantt chart, by first clicking on the **Predecessors** or **Successors** list in the dialog window and then clicking on the desired time bar in the Gantt chart.

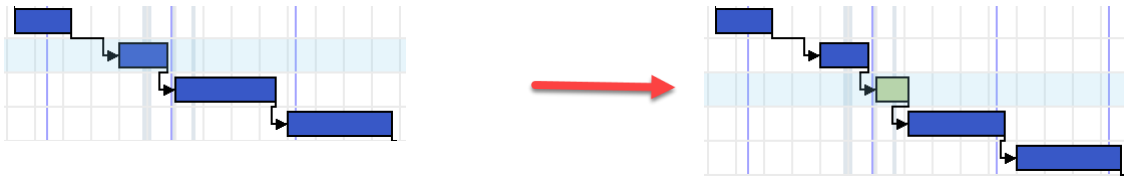
The following functions are available in the dialog box:

- Link selected time bars
- Specify the type of link ("End/Start", "End/End", "Start/Start" or "Start/End")
- Set the spacing of the time bars (if the **Move successors** selection is not active, the spacing will not be changed when linking)
- Type of linkage **Fixed** or **Variable**
- Links disconnect

Automatic links

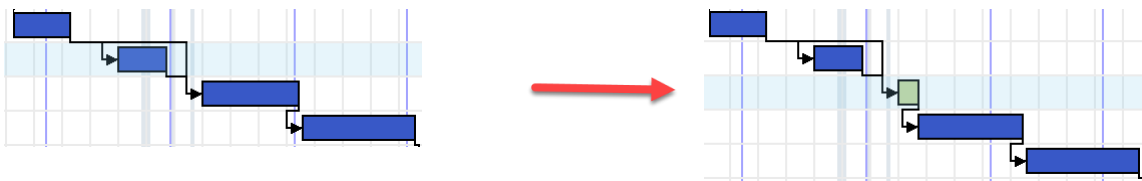


If **auto-linking** is activated, links to the predecessor or successor are automatically inserted when **new tasks are created**, where this makes sense:



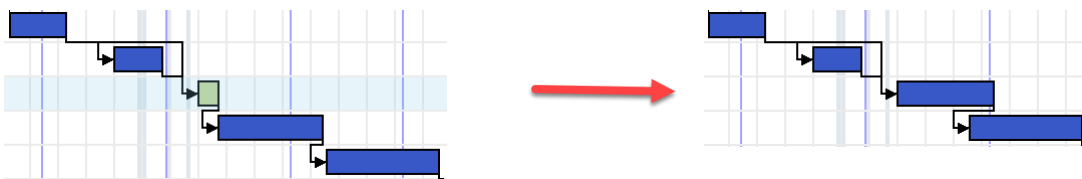
The link(s) to the predecessor is/are adopted and the successor is linked in such a way that its start is identical to the end of the new time bar.

If the predecessor therefore has several links, they are transferred to the new time bar in the same form:



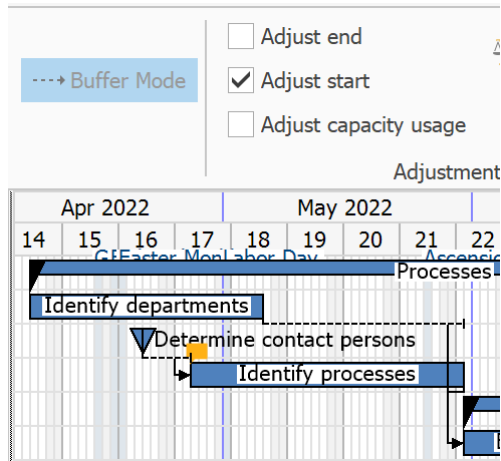
Links with **headings** are not inserted.

When an **task is deleted**, the successor - if available - is linked to the predecessor(s) of the deleted time bar:

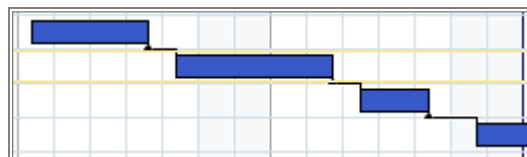


Buffer mode

Normally, linked time bars are generally moved when one of the predecessors is moved. If this is temporarily not desired, the **buffer mode** can be switched on, all links are then displayed dashed and shifts are not passed on to subsequent time bars:



Fixed end (backward linking)



For projects with a fixed end (e.g. delivery date), it can be useful to link the individual tasks not from the beginning to the end, but from the end to the beginning. With this backward linking, changes propagate from right to left.

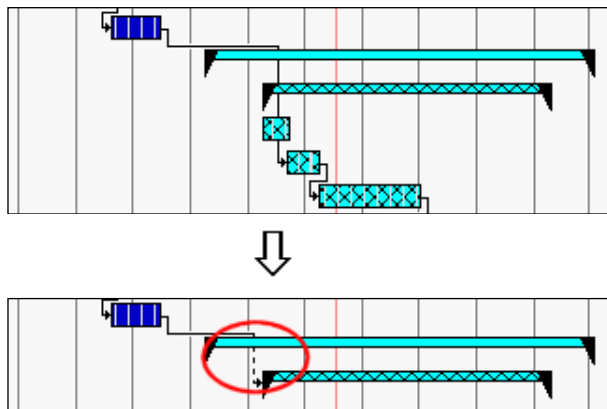
However, this approach only makes sense if the start of the project is to be determined during the planning phase. Delays after the start of the project would only lead to the realization that one has started too late!

For backward links, the dialog box can be customized. In this case the successors are on the left and the predecessors on the right:

The 'Links' dialog box is shown with two main tables: 'Successor' on the left and 'Predecessors' on the right. Both tables list hierarchical task structures. In the 'Successor' table, task 3 is selected. In the 'Predecessors' table, task 4 is selected. Below the tables, the 'Time bars' section shows '3' and '4' in dropdown menus. The 'Start' radio button is selected for both tasks. The 'Distance' is set to '0,00 h' and 'Buffer' is '0,00 h'. The 'Backward link display' checkbox is checked and highlighted with a red box. Other options like 'Fixed', 'Variable', 'Move successor', 'Disconnect link', and 'Close' are also visible.

Link leading to collapsed headings

Linking lines ending at task bars which are included in collapsed headings are displayed as dotted lines in this area:



Note:

Links cannot be selected and deleted if one of the time bars is in a collapsed heading!

Closed circle reference

When linking several time bars, it can happen that a closed circle is created, whereby each bar would ultimately be its own predecessor.

Since this linkage, also called circular reference, contradicts the laws of logic, in this case a hint is given and the linkage is not made.

Buffer times

Time reserves between two processes are referred to as **buffer times**. These have the effect that delays within a project do not affect the following steps until the buffer time has been used up.

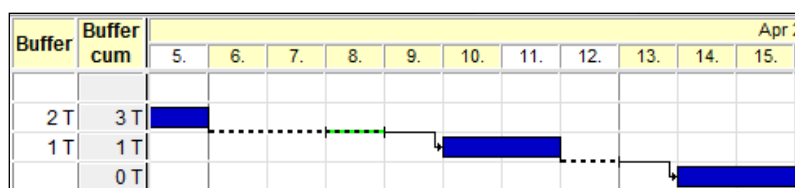


The **second task** has a float of 1 day **(1)**. This means that its end can be shifted to the right by 1 day without falling below the minimum interval **(2)** of 1 day to the next task and thus without shifting the subsequent tasks.

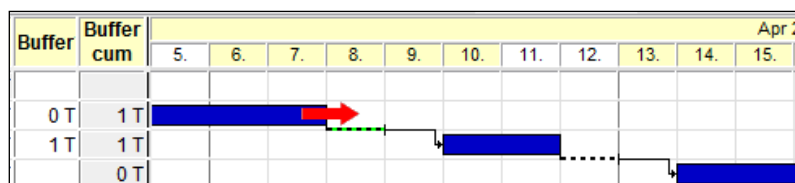
The **first task** has a buffer time of 2 days **(3)** and a minimum interval to the next task of 2 days **(4)**.

If the effects on the entire chain are taken into account, the float time of 1 day of the second task is added to the first task, resulting in a **total (=accumulated) float time of 3 days (5)**. This means that the first task can be shifted to the right for 2 days without affecting the **next task** and for 3 days without affecting the **last task** in the chain.

To clarify the relationships, the following illustrations show the effects that arise when the end of the first task is increasingly delayed.



1. initial situation



2. delay first task by 2 days

Result: No effect on following tasks; own buffer of the first task is used up; however, if the entire chain is taken into account, a (cumulative) buffer of 1 day is still available.

Buffer	Buffer cum	5.	6.	7.	8.	9.	10.	11.	12.	13.	14.	15.	Apr 2
-1 T	-1 T												
0 T	0 T												
0 T	0 T												

3. delay first task by **3 days**

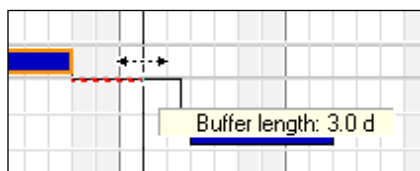
Result: Second task is postponed by 1 day and thus also uses up its float time; as a result, the first task no longer has a cumulative float.

Buffer	Buffer cum	5.	6.	7.	8.	9.	10.	11.	12.	13.	14.	15.	Apr 2
-2 T	-3 T												
-1 T	-1 T												
0 T	0 T												

4. delay first task by **4 days**

Result: Last task is delayed by 1 day, because the original buffer of 3 days (within the whole chain) was exceeded by 1 day.

Setting the buffer times



The buffer time can either be entered in the corresponding column of the table or specified by holding down the left mouse button. To do this, the end of the time bar that is to receive a buffer time is "touched" at the bottom edge so that the mouse arrow takes on the shape visible on the left.

Notes

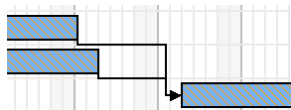
Buffers can **only** be created **forwards**, i.e. from left to right.

The length of a buffer (including accumulated buffers) is generally determined using the **default calendar** (see "Create resource calendar" on page 85) is calculated or displayed. In **actual mode** (see "Target/actual comparison, forecast" on page 103), the buffers can neither be created nor changed.

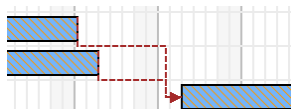
If the limit of a buffer is exceeded, a **negative buffer is** displayed. This enables A-Plan to display the original buffer again when moving a task to the left. Further effects do not result from a negative buffer.

Multiple links

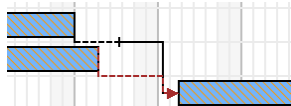
A task can also have several successors or several predecessors.



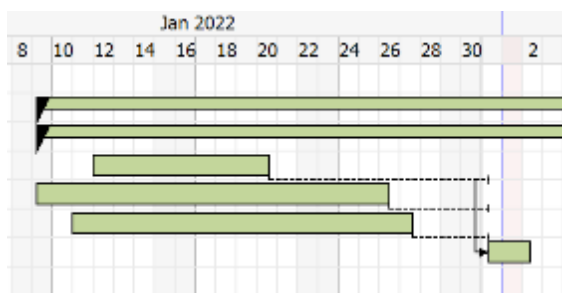
If a task has two or more predecessors, the common successor is moved with every shift of a predecessor in the case of **fixed** links.



If this is not desired, the links must be created in a **variable** way, then the successor is only moved when the moved predecessor has reached its beginning.



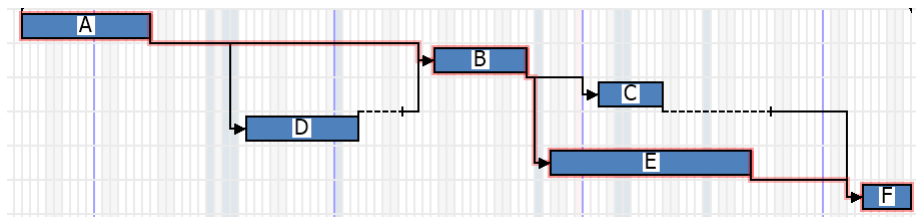
If a certain distance is to be maintained, a **fixed linkage with buffer** (upper predecessor) is selected.



If the predecessors are to have different distances to the successor in the planning phase, buffer times are defined for the predecessors, e.g. until the start of the successor. The successor is then only moved when the latest end of the predecessors has reached the start of the successor.

Critical path

Optionally, the **critical path** can be indicated. This is the path from the start to the end of a project - or sub-project - where **the sum of all buffer times is lowest or equals 0**. A delay in an activity on the critical path therefore always results in a delay in the end date.



This is the case here with path **A - B - E - F**, why it is marked **red**. The other paths are **not critical**, as either the buffer at **C** or at **D** comes into effect.

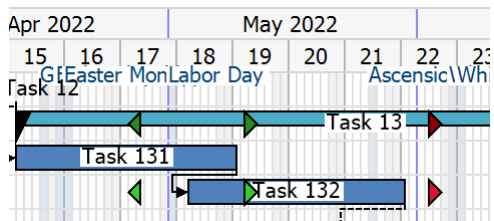
The **marking of the critical path** is done in the **View** tab.

The same applies to displaying the **accumulated buffer** (see "Buffer times" on page 60).

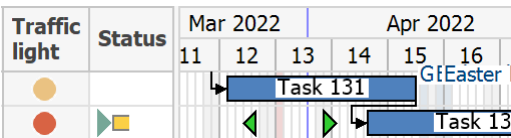
Limits

Limits ensure that it is immediately recognizable when a project or an activity exceeds certain limits. The limits are taken into account both in planning and in the actual status.

They can be entered either in the respective column as date/time or after preselection in the **Data Gantt Chart** tab by double-clicking on the desired position.



If a change causes one of the existing limits to be exceeded, a note is displayed in the **Status** column:



Series (periodic dates)

There are dates that are regularly repeated, such as anniversaries, meetings, maintenance dates etc. To simplify the entry of these dates, A-Plan has a special dialog window for this purpose.

The dialog window is opened by clicking **Series** in the **Data Gantt Chart** tab.

Important:

A series can only be created if the first time bar of the desired series has been entered and marked **beforehand**. In addition to the start of the series, this time bar determines the **time of the start and the duration of all time bars of the series to be created!** An exception are series in minute or hour intervals (see below), with these the marked time bar determines only the duration of the other time bars.

A series can only be created if **no resources** have been **assigned yet**. This should therefore only be done after the series has been created.

So that as many variants of series appointments as possible can be generated, four different series patterns are available. The number of appointments can either be entered as a numerical value or calculated automatically by entering the end date. Furthermore, already existing single appointments or series can be deleted before creating a new series.

Series pattern 'Each(s)/all'

This series pattern is suitable for all appointments that are to be repeated at the same intervals, and the following units can be selected:

Minutes,
Hours,
Days and
Weeks

Series pattern

☒ Each / all

Each / all Hour(s) between and

on

☐ Monday ☐ Friday

☒ Tuesday ☐ Saturday

☐ Wednesday ☐ Sunday

☒ Thursday

Exclude

☒ Holidays

If excluded,

☐ Omit dates

☒ Shift dates

For the "Minutes" and "Hours" units, both the days of the week and the time range to be considered in each case can be specified.

In addition, it is possible to exclude holidays or weekends from the assignment of appointments.

Except for the units "minutes" and "hours", appointments that have been excluded can either be suppressed or moved to the next permissible day. For "Minutes" and "Hours", excluded appointments are always suppressed.

Series pattern 'Day(s) of the week'

The series pattern 'Day(s) of the week' is used when appointments are to be generated that are to take place at intervals of one or more weeks on always the same days.

Series pattern

☐ Each / all

☒ Day(s) of the week

☐ Day of the month

☐ Day of the year

on

☐ Monday ☐ Friday

☒ Tuesday ☐ Saturday

☐ Wednesday ☐ Sunday

☒ Thursday

Each / all Week(s)

Exclude

☒ Holidays

If excluded,

☐ Omit dates

☒ Shift dates

This can also be several days if they are to take place in the same week, e.g. always on Tuesday and Thursday at intervals of 2 weeks.

Series pattern 'Day of the month'

There are two options here:

The 'Series pattern' dialog box shows three radio button options: 'Each / all', 'Day(s) of the week', and 'Day of the month'. The 'Day of the month' option is selected. To the right, there are two sets of controls. The first set has a radio button labeled 'on' (which is selected), a text box containing '3', a small up/down arrow, and the text '. day every / all'. The second set has a radio button labeled 'on', a dropdown menu showing 'last', another dropdown menu showing 'Monday', the text 'Each / all', a text box containing '1', a small up/down arrow, and the text 'Month(s)'.

Either a specific calendar day is selected for the desired dates

The 'Series pattern' dialog box shows three radio button options: 'Each / all', 'Day(s) of the week', and 'Day of the month'. The 'Day of the month' option is selected. To the right, there are two sets of controls. The first set has a radio button labeled 'on', a text box containing '3', a small up/down arrow, and the text '. day every / all'. The second set has a radio button labeled 'on', a dropdown menu showing 'first', another dropdown menu showing 'Monday', the text 'Each / all', a text box containing '2', a small up/down arrow, and the text 'Month(s)'.

or
a certain day of the week,

whereby in both cases the interval between two dates can be any number of months.

Series pattern 'Day of the year'

This series pattern is similar to the pattern 'Day of the month'.

The 'Series pattern' dialog box shows four radio button options: 'Each / all', 'Day(s) of the week', 'Day of the month', and 'Day of the year'. The 'Day of the year' option is selected. To the right, there are two sets of controls. The first set has a radio button labeled 'on', a text box containing '5', a small up/down arrow, a dropdown menu showing 'January', the text 'Each / all', a text box containing '1', a small up/down arrow, and the text 'Year(s)'. The second set has a radio button labeled 'on', a dropdown menu showing 'first', another dropdown menu showing 'Monday', the text 'in', a dropdown menu showing 'January', the text 'Each / all', a text box containing '1', a small up/down arrow, and the text 'Year(s)'.

A fixed date can be selected

The 'Series pattern' dialog box shows four radio button options: 'Each / all', 'Day(s) of the week', 'Day of the month', and 'Day of the year'. The 'Day of the year' option is selected. To the right, there are two sets of controls. The first set has a radio button labeled 'on', a text box containing '5', a small up/down arrow, a dropdown menu showing 'January', the text 'Each / all', a text box containing '1', a small up/down arrow, and the text 'Year(s)'. The second set has a radio button labeled 'on', a dropdown menu showing 'first', another dropdown menu showing 'Monday', the text 'in', a dropdown menu showing 'January', the text 'Each / all', a text box containing '1', a small up/down arrow, and the text 'Year(s)'.

or
a day of the week of a particular month.

In these cases, the interval between 2 appointments is one or even several year(s).

Create serial appointments

The 'Period / number' dialog box has two radio button options: 'End by' and 'Number of dates'. The 'Number of dates' option is selected. To the right of the 'End by' option is a text box containing '25/09/2022' and a small dropdown arrow. To the right of the 'Number of dates' option is a text box containing '5', a small up/down arrow, and the text '(create new)'. At the bottom, there is a checked checkbox labeled 'Link time bars'.

After the desired series pattern has been set, enter either the desired time period or the number of appointments your series should have. The series appointments are created - starting with the selected time bar - by clicking the Create series button.

So that serial appointments can be distinguished from manually entered appointments, they are marked by a colored circle at the beginning of the time bars. They can still be treated like manually entered time bars, i.e. moving, deleting etc. is possible at any time. Subsequently changed time bars are marked by a white mark within the identifying circle (second time bar from the left):



Linking series appointments

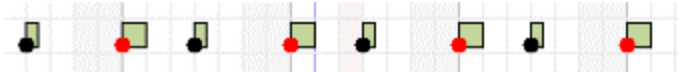
If later on it should be possible to shift the whole series by a certain period of time, the option **Link time bars** can be activated. In this case, the time bars are automatically linked by a "start-to-beginning" relationship (see "Link time bars" on page 54):



Multiple series in one row

Several series can be created in one row. In this case, after creating the first series, manually enter the first time bar of the second series and then create the second series.

Each series within a row is marked with a different color:



Delete existing appointments

Before create new series

Current series:

- ☒ Delete entire current series
- ☐ Delete to the right of selection
- ☒ Delete manually changed time bars

Other series / individual time bars:

- ☐ Delete all existing single time bars
- ☐ Delete all existing series

Before creating a new series, existing individual appointments or series can be deleted (e.g. if a series is to be created again with changed settings).

Restrictions

If the first (marked) time bar is linked to other time bars, the linked time bars will not be duplicated when creating the series!

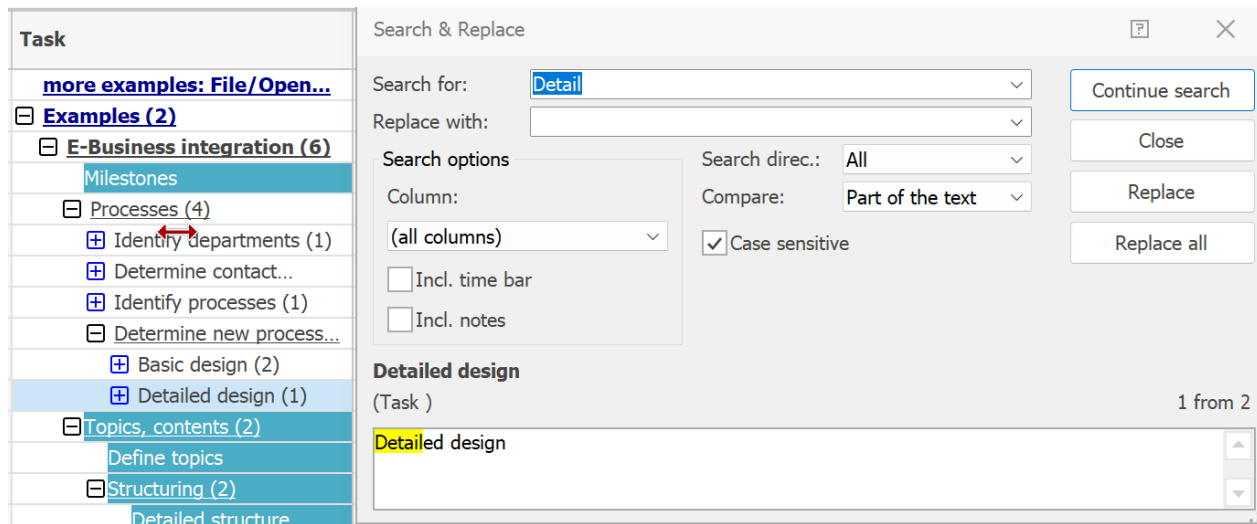
When creating a series, no check is made for speed reasons as to whether the new time bars overlap with existing ones.

For tasks with assigned resources, a series can no longer be created if the working time is changed for one of the resources (see "Special cases (flexible resource allocation)" on page 96) or if a series has already been created. Therefore, the series should always be created first at the task and only then the processing times should be changed at the resources or a series should also be created.

SEARCH AND REPLACE

Search

Clicking on the **Search & Replace** function in the **Table Data** tab opens a dialog window that can be used to search for or replace any text. If the specified text is found after clicking the **Search** button or then the **Continue search** button, the relevant row in the table is highlighted and the text found is displayed in its context in the lower part of the dialog box:



Note:

Only the rows that are currently in the table are considered - regardless of whether they are currently visible or located in closed folders or projects. Data that are not included in the table because they do not meet set filter conditions will not be included!

Replace

If the text(s) found are to be replaced by others, this can then be done by clicking on **Replace** or **Replace all**.

Note:

Data located in folders without sufficient access rights will not be changed by the **Replace** function!

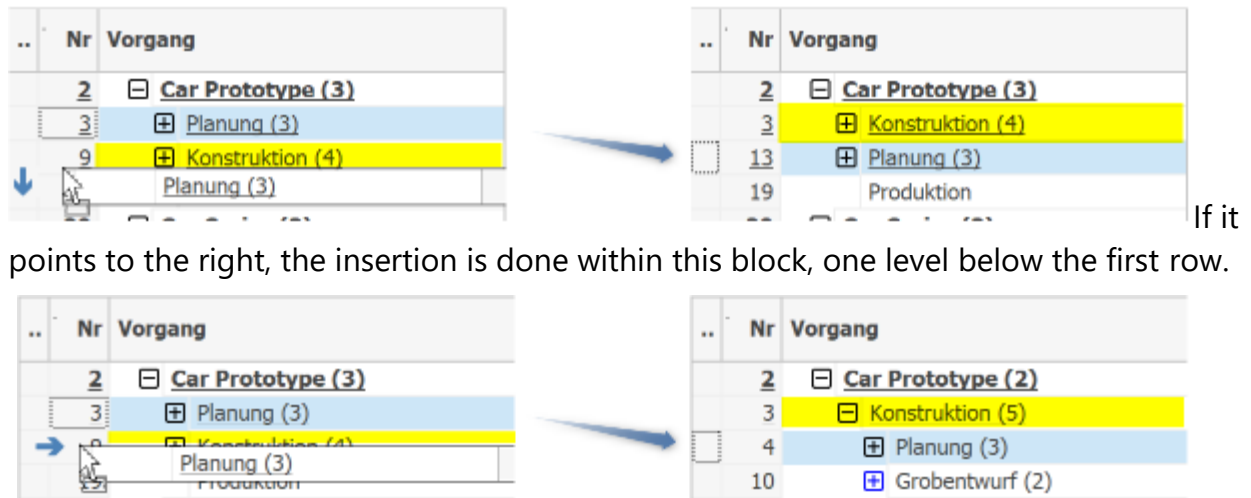
MOVE AND COPY FOLDERS, PROJECTS AND TASKS

Moving rows (changing the display order)

The order of projects and tasks can either be set manually or set as sorting by one or more column values. If no column sorting is set (see "Sort order" on page 20), the existing order can be changed manually.

To change the order, select the row or several rows to be moved in the number column and drag them to the desired position with the mouse.

If the insert is to be inserted below the block on which the arrow is currently located, press the **A KEY** at the same time. The arrow will then point to the right:



Copy, Cut and Paste

Select the row(s) you want to copy or cut and choose **Copy** or **Cut** in the **Data Table** tab or the familiar key combinations Ctrl+C or Ctrl+X.

5	3	[-] Processes (4)
6	4	[+] Identify departments (1)
8	4	[+] Determine contact...
10	4	[+] Identify processes (1)
12	4	[-] Determine new process...
13	5	[+] Basic design (2)
16	5	[+] Detailed design (1)
Lev. 1: 2/2 Lev. 2: 2/2 from lev. 3: 47/47		
0/0/13/14		

If you have selected a folder or a project, not only the respective "row" but the complete fold-er with all projects, tasks and time bars or the complete project with all tasks and time bars will be copied.

The number of copied or cut folders / projects / tasks / time bars in the A-Plan clipboard is -displayed on the left -in the status bar.

The copied row or block can then be pasted below a selected row.

Transferring projects and resources to another A-Plan database

Projects and resources can be transferred to another database, and this is also possible with complete folders.

To do this, A-Plan is called up twice on the same computer and the desired databases are opened. Since in this case both programs use the same clipboard, the transfer can be made by copying or cutting the desired data in the first database and pasting it into the second database.

Projects and resources are transferred separately, the assignment of resources to tasks is done automatically via the names of the resources. Resources must therefore be transferred first.

Move all appointments of a folder, project or task by a fixed period of time

Shift Dates

Task:
Car Prototype

Shift by:

Years: 0
Months: 2
Weeks: 0
Days: 0
Hours: 0
Minutes: 0

Tracked times:

☐ Unchanged
☒ Delete

Important:
If 'Delete' is selected, time entered by time tracking are also deleted.

☒ Shift limits, reminders

Reference date: 20.02.2022 06:00
New date: 20.04.2022 06:00

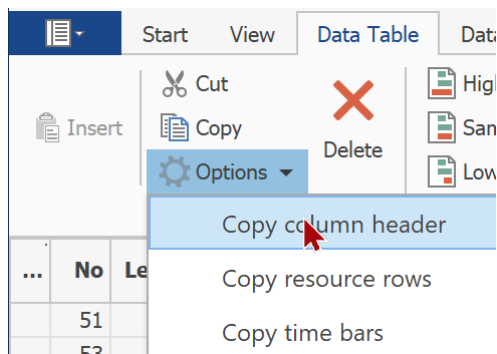
Shift Date(s) Close

If not only one operation, but a larger area of a database is to be shifted by a fixed period of time, a special function can be used for this purpose.

To do this, select the tasks, projects or even folders and choose **Shift** in the **Data Gantt Chart tab**, whereupon the dialog box shown on the left opens, in which you can enter the desired time shift.

Windows clipboard

Projects or resources are also available in the Windows clipboard after copying, so that the copied data can also be pasted into another application such as MS Excel.



In the **Data Table** tab, you can specify which data should be transferred to the intermediate table.

DATA DELETION

Delete folders, projects, tasks or time bars

One or more rows (folders, projects, tasks) or a time bar can be deleted by first selecting it and then either

in the **Data Table** tab the **Delete** command or
the DEL key is pressed.

If a time bar is marked, the delete command is applied only to the time bar, otherwise to the marked rows.

Important:

When deleting folders all projects of these folders are deleted, when deleting projects all tasks of these projects are deleted as well!

If the options are set accordingly (see "Confirm deletion of data" on page 128), a deletion process will only be executed after you have confirmed it again.

SPECIFYING THE DATA TO BE DISPLAYED / PRINTED

FILTER, SEARCH

Starting with version X of A-Plan, filters can be entered directly at the titles of the individual columns as column **filters** (see same page below).

So that the filters of older versions of A-Plan can still be used, the **dialog filters are** also still available (see Dialog filter on page 74). In addition, the dialog filters make it possible to specify specific projects and resources for display or printing.

Hint:

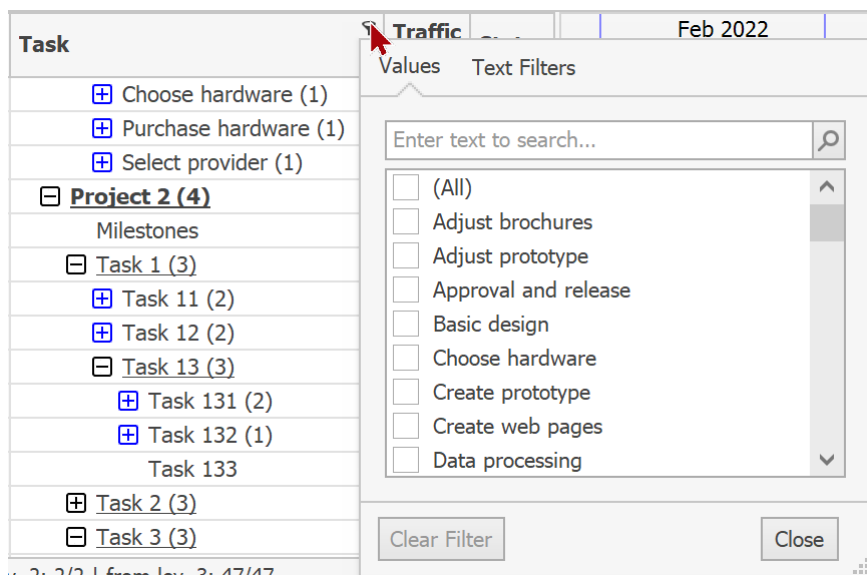
Since the **column filters**, with the exception of the project and resource filters (see

Project/resource filter on page 74) contain all the possibilities of the dialog filters, but are much more flexible and extensive, we recommend using only the column filters for new planning, with the exception of the project and resource filters.

A special kind of filters are the **status filters**, which can be switched on and off directly in the **Start** menu of A-Plan (see Status filter on page 81).

COLUMN FILTER

After clicking the funnel icon in the title of a column, a window for setting filters or searching data will be displayed.



In the **Values** tab, the values of the relevant columns are displayed, and in the field above, the selection can be restricted:

After activating the desired values, only the selected ones are displayed in the table - including the respective headings, since otherwise it would not be recognizable to which the found entries belong:

Below the table, the filter set in each case is displayed, where it can be temporarily deactivated or deleted:

In addition, it is possible to combine filters of different columns, here e.g. with a **text filter**, so that in addition only all resources are displayed that begin with a certain text:

DIALOG FILTER

Performance

Besides the performance of the respective computer and the bandwidth of the network connection, the performance of A-Plan essentially depends on the **number of data in the main table**.

Therefore, there are two ways to limit the number:

Setting **project or resource filters**, see next chapter,
and

Exclude data that are in the past and therefore not currently of interest, see Do not show completed projects on page 76.

Limiting the data to only what is currently needed also has a significant impact on the delays caused by **refreshing** every 30 seconds when changes are made by other users. Since the refresh only affect the data currently in the table, they are significantly reduced by the above measures.

Changes to data that is not currently in the table will not be updated until they change due to other filter settings etc.

After clicking the **Set dialog filter** button in the **View** tab, a dialog window opens where various filters (search criteria) can be set.

The set filters are activated in the **View** tab by snapping **Project/resource filters on/off** or **General filters on/off**.

Project/resource filter

In the first tab, in the list **Folder / Project / Task list displays** all projects with their tasks that are in the database. The **Resource group / Resource** list shows the resources present in the database:

Filter ? X

Projects / Resources Gen. Filter - Text Gen. Filter - Date General Filter - free text fields

Folder / Project / Task		Read in	Resource Group / Resource		Read in
1	<input checked="" type="checkbox"/> Examples (2)	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/> Externe (1)	<input checked="" type="checkbox"/>
2	<input checked="" type="checkbox"/> E-Business integration (6)	<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/> WBA Ltd. (3)	<input checked="" type="checkbox"/>
3	<input checked="" type="checkbox"/> Data processing (3)		3	<input checked="" type="checkbox"/> Internal staff (3)	<input checked="" type="checkbox"/>
4	<input checked="" type="checkbox"/> External implementation (5)		4	<input checked="" type="checkbox"/> Miller (3)	<input checked="" type="checkbox"/>
5	<input checked="" type="checkbox"/> Internal implementation (7)		5	<input checked="" type="checkbox"/> Schulz (3)	<input checked="" type="checkbox"/>
6	<input checked="" type="checkbox"/> Milestones		6	<input checked="" type="checkbox"/> Stevens (3)	<input checked="" type="checkbox"/>
7	<input checked="" type="checkbox"/> Processes (4)				
8	<input checked="" type="checkbox"/> Topics, contents (2)				
9	<input checked="" type="checkbox"/> Project 2 (4)	<input checked="" type="checkbox"/>			
10	<input checked="" type="checkbox"/> more examples: File/Open...	<input checked="" type="checkbox"/>			

 max. level: max. level:

 ☒ Do not show completed projects

Earliest end date

If the **Project/resource filter on/off** function has been activated, only the folders or projects selected in the lists on the left in each case will be visible in the table of the main window.

Read in

The **Read in** column should only be used for **large databases** (more than approx. 5000 tasks) or if either projects and resources are planned in a database that have **no overlaps** or if, for performance reasons, **only part of the planning is** currently to be taken into account.

Advantage:

- Not all data is read in from the database, which means that A-Plan **reacts more quickly to input and changes**, and there are no delays due to updates following changes made by other users.

Disadvantages:

- **Projects that have** not been read in do **not affect the workload of** resources.
- If **resources** have been excluded from the import, their **assignment to projects or tasks is not visible**. They are either not displayed at all or - if other resources are also assigned - they are displayed as N.N.. Therefore, resources should only be excluded from the import if projects are displayed or processed in which the re-

sources concerned are not used.

Notes:

The **folder and project rows themselves are always read in**, since they must be available for display in the filter dialog, among other things. If no display in the table is desired, the check mark on the left can be removed.

Projects and resources for which **no authorization** has been set in the user administration (see Project permissions on page 150 and Resource permissions on page 152) are generally not read in and also not displayed in this dialog box.

Do not show completed projects

Projects (= 2nd level) are not displayed in the table if they are completely finished.

Earliest end date

The date set here specifies that no tasks or projects are to be read in from the database whose end date is further back than the **Earliest end date**.

The **Earliest end date** can be changed at any time without affecting planning data. If it is deleted, all data of the database will be read in.

The Earliest End Date function also has the advantage that it is not necessarily necessary to swap out older projects by copying and pasting them into an **'archive' database**.

If you still want to do this, it makes more sense not to copy and paste, but to create a copy of the database by **saving it as** and, if necessary, to delete the projects in this database that are still current.

Hint:

The **profile change takes longer** if different conditions for the **read-in** or **the Earliest end date** have been set in the profiles, since in these cases the data must be read in again from the database.

General filter - Text

In the second tab, filters can be set for **all text fields, assigned resources, list fields, priority** and **level**:

In contrast to the **Projects / Resources** tab, the **Assigned resources** refer to the resource column in the upper part of A-Plan and not to the groups or resources in the lower part of the main view.

Groups or resources that are not activated in the first tab are not displayed in the list of **Assigned resources**.

If the searched text can be in any database field, enter the search text in the **Any text field**. In this case, the search will also take into account texts located in **note fields** or in the **user defined text fields** (see below).

Under **Compare** you can specify whether the **Entire contents of then field** or a **Part of the contents of then field** is to be compared or the comparison on the basis of a **Search pattern** should be made.

If the **Search pattern** option has been activated, the wildcards "*" and "?" can also be used for all texts. Thus, if "**Mei***" is entered, all texts beginning with "Mei" will be found, e.g. "**Meier**", "**Meisel**" and "Meinrad". If "**M?? er**" is entered, all texts are found that begin with "M", end with "er" and have exactly two characters in between, e.g. "Maier" and "**Meyer**", but not "**Muller**".

Within the text fields, individual strings can be linked with OR and AND:

For example, if you enter "Mai* OR Mei*" for **Responsible** and select the **Search pattern** option, all rows will be found where the responsible person starts with either "Mai" or "Mei".

Important:

All fields of the **general filters** are linked with AND, i.e. in case of several conditions only those records (=rows) will be found, which fulfill all conditions.

Show all subtasks

If the **Show all subtasks** selection is enabled, all subordinate tasks are displayed for tasks that meet the set conditions, i.e. even if they do not meet the conditions.

Hint:

If a **status filter** is set at the same time in the **Start** tab of the main window when selecting **Show all subtasks** (see "Traffic light, Status and Deadline" on page 19), for example, all tasks of a certain project can be displayed whose end date has passed.

Invert filter

Filters can also be set to be exclusionary, i.e. if the **Invert filter** option is enabled, all tasks that do NOT match the filter condition will be displayed.

Delete general filters

Clicking the **Delete general filters** button resets all general filters.

General filter - Date

In the third tab, filters can be set for two different date fields.

Filter

Projects / Resources Gen. Filter - Text **Gen. Filter - Date**

Criterion 1 Start pld. After 21/03/2022

Criterion 2 End pld. Before 30/06/2022

All fields that have a date can be included in the date filter:

Criterion 1 Start pld. Planned time to be spent on task Start pld. End pld. Actual time to be spent on task Start is End is End forec. Entry Date Reminder Completed on Last change

Criterion 2

The following options are available for defining the time period:

After Before On After Between Time range Current week Current week + 1 Current week + 2 Current week + 4 Current month Current month + 1 Current month + 2 Current month + 4

If you select a **time period**, you can, for example, create a to-do list for a certain period of time. For example, all tasks can be displayed or printed whose processing time (or part of it) is within one week in the past and 4 weeks in the future:

Criterion 1

Start pld.

Time range

between and

Start/end of the time span based on the current date

The variants **Current week (+ n)** and **Current month (+ n)** have a similar function, e.g. the settings **Planned time to be spent on task** and **Current week + 2** display all tasks that have to be processed within the current and the next two weeks.

General filters - free text fields

In the fourth tab, filters can be set for the freely assignable text fields:

Projects / Resources	Gen. Filter - Text	Gen. Filter - Date	General Filter - free text fields
Text1	<input type="text"/>		
Text2	<input type="text"/>		
Text3	<input type="text"/>		
Text4	<input type="text"/>		
Text5	<input type="text"/>		
Text6	<input type="text"/>		
Text7	<input type="text"/>		
Text8	<input type="text"/>		
Text9	<input type="text"/>		
Text10	<input type="text"/>		

STATUS FILTER

Since the **Traffic Light**, **Deadline** and **Status** columns cannot be filtered in this way due to the symbols contained here, the **status filters** are available for this purpose.

Filters are set by activating the buttons with the status to be selected. Here, for example, the reminder, so that the selection is further limited:

Lev	Task	Traffic light	Status	Link	Resources	Workl pld	Effort pld
1	Examples (2)	Red	Reminder			34 %	270.4 wd
2	E-Business integration (6)	Yellow	Reminder			29 %	171.3 wd
3	Processes (4)	Yellow	Reminder			35 %	31.8 wd
4	Determine new process...	Yellow				34 %	16.5 wd

Notes:

If you want to activate a **larger number of buttons**, you can first activate all of them using the button with the 4 rectangles () and then deselect the ones you do not want.

If **no button** is activated, **all projects / tasks** are displayed without restriction.

Appointment, **Traffic light** and **status** are linked with and. So, for example, if 'Red' is activated for **Traffic light** and the **Question mark** is activated for **Status**, only processes that have the red traffic light symbol and the question mark are displayed.

RESOURCE PLANNING

CONCEPT

The resource planning of A-Plan allows an extremely flexible allocation of resources (personnel, machines, tools etc.) for the processing of tasks. At the same time, great importance was attached to easy handling and clarity!

What can A-Plan resource planning do?

The following **problems**, among others, can be addressed:

How does duration for processing a task change when the number of resources is changed?

How many resources must be used to complete a process by a certain time?

What are the implications of certain resources not being available at certain times?

Which resources can be used for a task because they still have free capacity?

Which resources are overloaded?

What are the costs of using different resources?

How much overtime is required to complete a process on time and what is the cost impact?

What information does A-Plan's resource planning provide-?

The following **information** can be recorded simultaneously in one view:

What is the timing of the tasks?

At what times are the individual tasks processed by which resources and with which capacity?

What is the workload of resources over time?

What are the working hours of the resources (incl. special hours, overtime, etc.)?

When are which resources absent (and why)?

Which resources are still available in which time period?

Which resources are already at capacity or even overloaded?

How is resource planning operated in A-Plan?

Despite the high performance and the wide range of information that A-Plan provides, the **handling** of resource planning is very simple:

All settings are easy to oversee and understand.

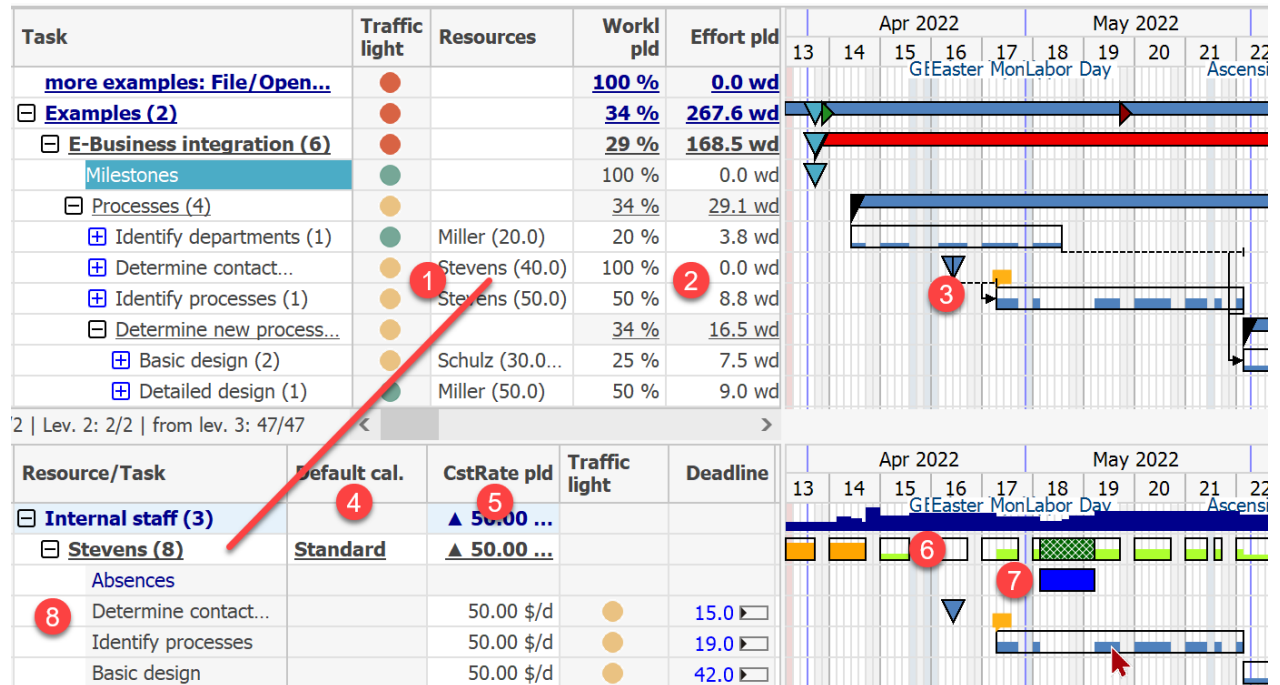
A-Plan supports you optimally in your planning without patronizing you.

Only the values that are actually required need to be entered.

If resource planning is not (or not yet) required for certain applications, A-Plan can easily be used without resource planning.

What does A-Plan resource planning look like?

For the display of resources, the main window of A-Plan can be divided horizontally. The upper half shows, among other things, the **tasks** with the assigned resources **(1)**, the respective effort **(2)** and the time bars **(3)**, whose filling pattern indicates when and with how much capacity work is being done on the tasks:



Note:

If all time bars are completely filled with the pattern color and not - as shown - only at the times when the tasks are processed, the **Workload** option in the **View** tab must be turned on.

At the same time, the **resources** are displayed in the lower half, including the **calendars** used (4), the **cost rates** (5), the **working hours** and **workloads** (6), the **absences** (7) and the **assigned tasks** (8). The meaning of the colors for different workloads is explained in the chapter "Utilization of resources / teams" on page 89.

In the task view, rows to which resources have been assigned can be **expanded** or **collapsed** by clicking on the blue "+". When open, a separate row is displayed for each resource:

Basic design	Miller (70); Schulz (50)	50 % - 70 %	
--------------	--------------------------	-------------	--

↓

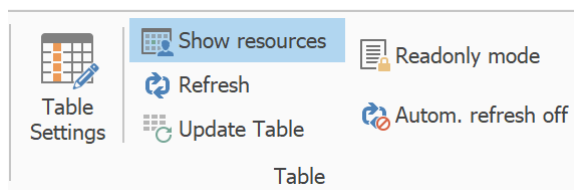
Basic design	Miller (70); Schulz (50)	50 % - 70 %	
- Schulz (50)	Schulz (50)	50 %	
- Miller (70)	Miller (70)	70 %	

CREATE THE RESOURCES

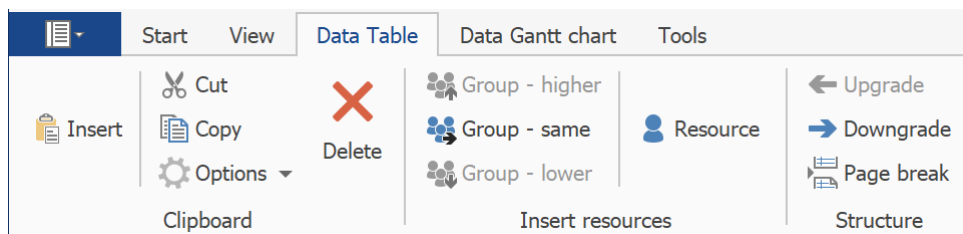
Resources can be of any type, such as people, machines, vehicles, rooms, or even meetings, and can be grouped together.

Display / create resources

To enter resources, the **Show resources** button in the **Start** tab must be snapped so that the table is split horizontally.



To create groups and resources, the functions **Group - higher**, **Group - same**, **Group - lower** and **Resource** are then available in the **Data table** tab:



If there is no entry yet, first select **Group - same** to create the first resource group.

Resource/Task
Company XYZ (2)
Internal staff (3)
Stevens (8)
Schulz (8)
Miller (14)
Production
External (1)
WBA Ltd. (5)

The groups can be subdivided as desired, but the resources must always be at the lowest level.

If you want to create another higher level above the current top level, first close this level by clicking the "+", create a new group below it using **Group - same**, drag and drop the new group to the top and step the existing group down by one level.

The availability or working times of the resources are defined by **resource calendars**, which can be entered in any number. The resource calendars are displayed by clicking the **Working times** button in the **Data Gantt chart** tab:

Calendar					
with effort	Holidays active	Start	End	Dur.	
<input checked="" type="checkbox"/> Worktime	<input checked="" type="checkbox"/>			39.00 h	
Monday		08:00	17:00	8.00 h	
Tuesday		08:00	17:00	8.00 h	
Wednesday		08:00	17:00	8.00 h	
Thursday		08:00	17:00	8.00 h	
Friday		08:00	16:00	7.00 h	
Saturday					
Sunday					
<input checked="" type="checkbox"/> Standard	<input checked="" type="checkbox"/>			40.00 h	
Monday		08:00	16:00	8.00 h	
Tuesday		08:00	16:00	8.00 h	
Wednesday		08:00	16:00	8.00 h	
Thursday		08:00	16:00	8.00 h	
Friday		08:00	16:00	8.00 h	
Saturday					
Sunday					

Create resource calendar

New calendars can be created after clicking **New calendar**.

Diagram illustrating a 5x2 grid of days of the week. The first column contains Monday, Tuesday, Wednesday, Thursday, and Friday. The second column contains Monday, Tuesday, Wednesday, Thursday, and Friday. A red vertical line is drawn between the two columns. A red double-headed arrow is positioned below the Friday labels in the second column.

Holidays, effort

A-Plan X

When calculating the **effort**, usually only persons and no work equipment are taken into account (e.g. the one-day use of a driver and a vehicle results in only one working day and not two). Therefore, it makes sense to use a special resource calendar for work equipment, with effort the column **with Effort**.

When **calculating costs**, resources without effort calculation are also taken into account!

Examples for the calculation of the duration

In the calendar shown below, the duration of a task that starts, for example, on Monday at 8:00 and ends on Wednesday at 14:00 is 2 days and 5 hours (2 x 7h + 4h + 1h):

Calendar	with effort	Holidays active	Start	End	Dur.	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00
<input checked="" type="checkbox"/> Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>												
<input checked="" type="checkbox"/> Worktime	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			35.00 h									
Monday			08:00	16:00	7.00 h	Monday							Monday	
Tuesday			08:00	16:00	7.00 h	Tuesday							Tuesday	
Wednesday			08:00	16:00	7.00 h	Wednesday							Wednesday	
Thursday			08:00	16:00	7.00 h	Thursday							Thursday	
Friday			08:00	16:00	7.00 h	Friday							Friday	
Saturday														

If the calculation of the duration is to be done in "real time", the times of the standard calendar must completely cover the week. In this case, the duration of the above example (start: Monday 8:00, end: Wednesday 14:00) would be 2 days and 6 hours (16h+24h+14h = 54h = 2 x 24h + 6h):

Calendar	with effort	Holidays active	Start	End	Dur.																									
<input type="checkbox"/> Realtime	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			168.0...	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	0
Monday			00:00	00:00	24.00 h	Monday																								
Tuesday			00:00	00:00	24.00 h	Tuesday																								
Wednesday			00:00	00:00	24.00 h	Wednesday																								
Thursday			00:00	00:00	24.00 h	Thursday																								
Friday			00:00	00:00	24.00 h	Friday																								
Saturday			00:00	00:00	24.00 h	Saturday																								
Sunday			00:00	00:00	24.00 h	Sunday																								

In case of **different length of working days**, it is necessary to create at least one more calendar and then use it for the affected resources.

If you do not want to consider specific working hours, but complete days, i.e. **real time**, use a calendar with 24 hours per day and 7 days per week as shown above.

DETERMINATION OF WORKING HOURS AND ABSENCES OF RESOURCES

Working hours

For newly created resources, the default calendar is used (see "Create resource calendar" on page 85), so that the working times entered in this calendar generally apply:

Resource/Task	Default cal.	Apr 2022	May 2022
<input type="checkbox"/> Internal staff (4)		14 15 16 17 18 19 20	
<input type="checkbox"/> (Resource)	Standard		

The resulting working times are displayed as rectangles in the first row of the resource in the Gantt chart. As long as the resource is still fully available in the relevant period, i.e. has not yet been assigned to a task, these rectangles are empty.

Resource/Task	Default cal.
<input type="checkbox"/> Internal staff (4)	
<input checked="" type="checkbox"/> (Resource)	Standard
<input type="checkbox"/> Stevens (8)	Realtime
Absences	Standard
Determine conta...	Worktime

If a different resource calendar is to apply (e.g. in the case of shift work or working days of different lengths), it can be selected from the list of all existing calendars (see "Create resource calendar" on page 85).

Absences

In the row **Absences** you can enter when a resource is not available (e.g. vacation). Absences are entered as time bars in the Gantt chart by double-clicking. These override the working times of the resource in question in the covered area.

Resource/Task	Default cal.	May 2022
<input type="checkbox"/> Stevens (8)	Standard	7 18 19 20
Absences		
Identify processes		

It is possible to synchronize absences with personal calendar entries in MS Outlook (see "Interface for import of actual times, absences" on page 117).

Absences can also be imported (see "Worksheet "Absences1"" on page 165 or Interface for import of actual times, absences" on page 214)

ASSIGNING RESOURCES TO THE TASKS

Adjust: ☐ Start ☐ End ☐ Workload ☒ No

Resource	Workl. pld.	Workl. rem.	Skill
<input type="checkbox"/> Assigned			
<input type="checkbox"/> Ulf (Konstruktion<Abteilun...		100,0 %	
<input type="checkbox"/> Standort xyz		63,0 %	
<input type="checkbox"/> Abteilung 1		63,0 %	
<input checked="" type="checkbox"/> Konstruktion		68,8 %	
<input checked="" type="checkbox"/> Produktion		100,0 %	
<input type="checkbox"/> Projektmanager		50,0 %	
<input checked="" type="checkbox"/> Hans	100,0	0,0 %	
<input type="checkbox"/> Petra		100,0 %	
<input type="checkbox"/> Verwaltung		33,3 %	
<input type="checkbox"/> Hanna		100,0 %	
<input checked="" type="checkbox"/> Sabine	100,0	0,0 %	
<input checked="" type="checkbox"/> Stefan	100,0	0,0 %	

After right-clicking on the **Resources** column, the resources can be assigned to the **tasks**.

In the resource selection, the last used resources are displayed as **Favorites** as the first block, so that the complete list does not always have to be searched for a larger number of resources.

As a second block, the currently **Assigned** resources are displayed.

In the resource selection, the average remaining workload is displayed for all resources in the period of the respective task. In the case of resources that have already been allocated, the planned workload by the current task is also displayed. This makes it easy to select the resource or resources that still have sufficient capacity in the required time period.

Filter, Skills

With a larger number of resources, the filter function can be used to find the desired resource(s). The function is the same as described in the chapter "Column filter" at page 72:

Resource	Workl. pld.	Workl. rem.	Skill
<input checked="" type="checkbox"/> Assigned			
<input checked="" type="checkbox"/> Eric (Internal staff)			
<input type="checkbox"/> Internal staff			
<input checked="" type="checkbox"/> Eric			

Values Text Filters

Begins With

Er

Clear Filter Close

The capabilities of the resources can be entered in the **List 10** column in the resources view ...

Resource/Task	List 10
<input type="checkbox"/> Internal staff (3)	
<input checked="" type="checkbox"/> Jenny (8)	Project management
<input checked="" type="checkbox"/> David (8)	FMEA; Quality management
<input checked="" type="checkbox"/> Eric (14)	FMEA

... which makes it possible to display only those that are eligible for the respective task when allocating resources:

Resource	Workl. pld.	Workl. rem.	Skill
<input type="checkbox"/> Internal staff			
<input type="checkbox"/> David		0.0 %	FMEA; Quality man.
<input type="checkbox"/> Eric		0.0 %	FMEA

etermine new processes

Values Text Filters

Contains

FMEA

Clear Filter

Close

Resource view

In the resource view (lower half of A-Plan), the resource in question is displayed, or the corresponding task if the assignment has already been made. Here you can also scroll to check the workload of different resources.

After accepting the assignment (press ENTER key), the following is displayed

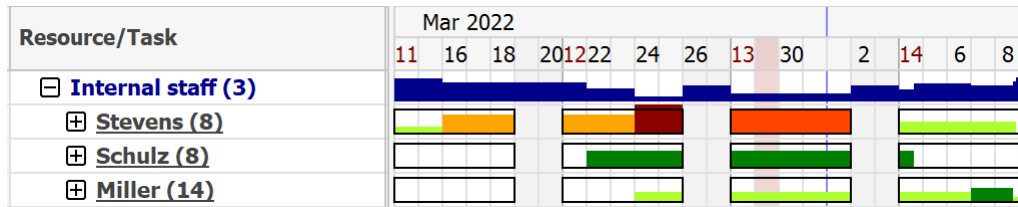
1. assigned the resource,
2. if necessary, the project sequence is adjusted,
3. the corresponding task is displayed at the resource in the lower part of A-Plan and
4. the affected period is marked as occupied according to the workload:

Task	Traffic light	Resources	Workl pld	Effort pld	Jun 2022	Jul 2022
<input checked="" type="checkbox"/> Identify departments (1)	●	Miller (20.0)	20 %	3.8 wd	24	25
<input checked="" type="checkbox"/> Determine contact...	●	Stevens (40.0)	100 %	0.0 wd	26	27
<input checked="" type="checkbox"/> Identify processes (1)	●	Stevens (50.0)	50 %	6.5 wd	28	29
<input checked="" type="checkbox"/> Determine new process...	●		34 %	16.5 wd	30	
<input checked="" type="checkbox"/> Topics, contents (2)	●		100 %	38.0 wd		

2 | Lev. 2: 2/2 | from lev. 3: 49/49

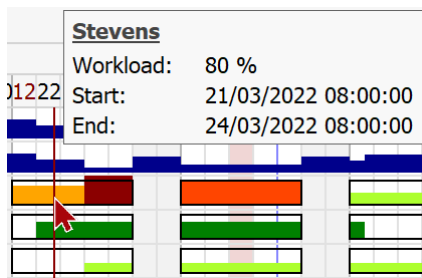
Resource/Task	Default cal.	Traffic light	Workl pld	Dur.	Jun 2022	Jul 2022
<input checked="" type="checkbox"/> Stevens (8)	Standard				24	25
Absences					26	27
<input checked="" type="checkbox"/> Identify processes		●	50 %	13 d	28	29

To get an overview of the workload of a larger number of resources, it is best to close all resources so that only the first row in each case is visible:



Color*	Workload*
-	0%
green	up to 50%
dark green	51% to 70%
orange	71% to 80%
red	81% to 100%
dark red	over100%

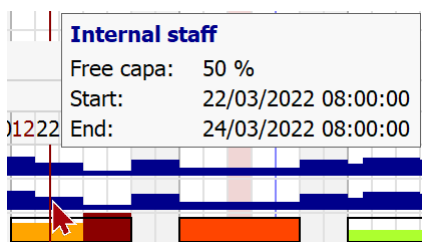
*If other colors or limits are to be used, this can be set in the options, see chapter "Resource workloads (colors, percentages)" on page 123.



When the mouse pointer is on a workload time bar for a resource, the percentage workload and the affected area are displayed in the mouse pointer information field.

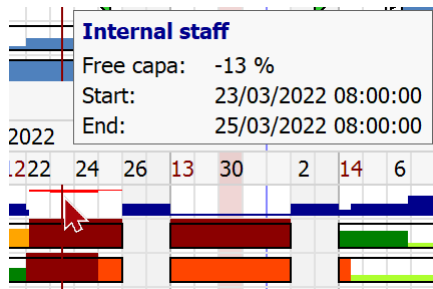
Important:

The calculation of effort and costs also takes into account a workload > 100%. If a resource is scheduled to be used e.g. at 120% in a certain period, higher values will be calculated for this period for both the effort and the costs!



In the top row of each resource group, the remaining capacity of the entire group is displayed as a bar chart (no column = 0% remaining capacity, full height of the column = 100% remaining capacity). The exact remaining capacity that is still available at a certain point in time is displayed in the info field when touched with the mouse.

In the **absence of resources**, the remaining capacity is reduced accordingly.



Negative remaining team capacities are displayed as red bars, shown from top to bottom to clearly distinguish them from positive values.

Default values of the resources

When assigning resources to tasks, the values of the respective resource are used by default for the calculation of effort and costs:

Task	Resource	Lab. Rate Pl'd	Qty/Time Pl'd	Fix. Cost Pl'd
⊕ Sawing	EDC 312 (50)	250,00 \$/h	100/h	100,00 \$
⊕ Turning	RDC 316 (80)	180,00 \$/h	50/h	150,00 \$
1/1 6/8 < >				
Resource/Task		Lab. Rate Pl'd	Qty/Time	Fix. Cost
⊕ EDC 312 (1)		250,00 \$/h	100/h	100,00 \$
⊕ RDC 316 (1)		180,00 \$/h	50/h	150,00 \$

However, since there are also cases where these values do not depend on the resource used but on the task, the values taken from the resources can also be overwritten:

Task	Resource	Lab. Rate Pl'd	Qty/Time Pl'd	Fix. Cost Pl'd
⊕ Sawing	EDC 312 (50)	250,00 \$/h	100/h	100,00 \$
⊕ Turning	RDC 316 (80)	200,00 \$/h	50/h	150,00 \$
1/1 6/8 < >				

Manually entered values are no longer displayed with a blue background but with a white background to distinguish them from "resource values".

EFFORT / AUTOMATIC CALCULATIONS

Definition of effort

Wikipedia® provides the following definition of effort:

*"**Effort** is generally a measure of the effort or effort to be expended to achieve a particular benefit. Effort can be expressed quantitatively in monetary units, labor hours, material requirements, etc. "*

Different designations are often used for the **effort** (or "work"), such as "man-days", "working days" or "machine hours", or even just a unit of time, e.g. "days" or "hours". With A-Plan, the designation can be set as desired (see "Costs / Abbreviations" on page 120). For the documentation of A-Plan the designation **AT** = "working days" was chosen.

In A-Plan, the effort is generally the **duration of a process multiplied by the number of resources used**. So, for example, if a process is processed by 2 people for 5 days, it **takes** 5 days, but the **effort is** 2 x 5 days, i.e. 10 working days!

Required effort

Processing a task usually requires a certain amount of time, which determines the duration of a task depending on the properties of the assigned resource(s). A-Plan allows the following resource properties to be taken into account:

Number or factor

Working hours

Workload

Coefficient of performance (quantity per time)

Availability (presence or absence)

The effort **required is** usually determined by **experience** or **estimates**. In production areas, it can also be calculated if the number of units and the production time per unit are known (see "Output values (production planning) " on page 98).

Automatic adjustments

If desired, A-Plan calculates the effects of inputs or changes on the project flow. Some examples are shown below:

1. Assignment of a resource

Determine end (= duration) of a task when a resource is assigned with **100% of its capacity** and 100 working hours (wh) are required.

Result: Duration = 100h (admittedly trivial in this case).

Task	Status	Resources	CapUsg Pl'd	Work req	Dur.	Mar 2011		
						21-27	28-3	4-10
Folder 1 (1)				100.0 wh	40 h			
Project 1 (1)				100.0 wh	40 h			
Task 1				100.0 wh	40 h			
		Group 1						
		Res 1 (100.0%)						
		Res 2						
		Res 3						
						Adjust end Adjust begin Adjust capacity usage No adjustment		
Folder 1 (1)				100.0 wh	100 h			
Project 1 (1)		Res 1		100.0 wh	100 h			
Task 1		Res 1	100 %	100.0 wh	100 h			

2. Reduce workload

Determine the end (= duration) of the task if the resource is to be used **only at 80% of its capacity**.

Result: Duration = 125h

Task	Status	Resources	CapUsg Pl'd	Work req	Dur.	Mar 2011			Apr 2
						21-27	28-3	4-10	
Folder 1 (1)				100.0 wh	100 h				
Project 1 (1)		Res 1		100.0 wh	100 h				
Task 1		Res 1	80	100.0 wh	100 h				
						Adjust end Adjust begin			
Task	Status	Resources	CapUsg Pl'd	Work req	Dur.	Mar 2011			Apr 2
						21-27	28-3	4-10	
Folder 1 (1)				100.0 wh	125 h				
Project 1 (1)		Res 1		100.0 wh	125 h				
Task 1		Res 1 (80)	80 %	100.0 wh	125 h				

3. Assign another resource

Determine end (= duration) of task when a second resource is assigned with also 80% of its capacity.

Result: Duration = 62h

Task	Status	Resources	CapUsgr Pl'd	Work req	Dur.	Mar 2011	Apr 2011
Folder 1 (1)				100.0 wh	125 h	21-27	28-3
Project 1 (1)	<input type="checkbox"/>	Res 1		100.0 wh	125 h		
Task 1	<input type="checkbox"/>	Res 1 (80)	80 %	100.0 wh	125 h		
		<input type="checkbox"/> Group 1 <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Res 1 (80.0%) <input checked="" type="checkbox"/> Res 2 (80.0%) <input type="checkbox"/> Res 3 					
						<input checked="" type="radio"/> Adjust end <input type="radio"/> Adjust begin <input type="radio"/> Adjust capacity usage <input type="radio"/> No adjustment	

Task	Status	Resources	CapUsgr Pl'd	Work req	Dur.	Mar 2011	Apr 2011
Folder 1 (1)				100.0 wh	63 h		
Project 1 (1)	<input type="checkbox"/>	Res 1; Res		100.0 wh	63 h		
Task 1	<input type="checkbox"/>	Res 1 (80);	80 %	100.0 wh	63 h		
- Res 2 (80)	<input type="checkbox"/>	Res 2 (80)	80 %	50.0 wh	63 h		
- Res 1 (80)	<input type="checkbox"/>	Res 1 (80)	80 %	50.0 wh	63 h		

4. Set workload of ALL resources to a certain value.

Determine end (= duration) of task if both resources are to be used only at 50% of their capacity.

Result: Duration = 100h

Task	Status	Resources	CapUsq PI'd	Work req	Dur.	Mar 2011	Apr 2011
						21-27	28-3
Folder 1 (1)				100.0 wh	63 h		
Project 1 (1)	<input type="checkbox"/>	Res 1; Res		100.0 wh	63 h		
Task 1	<input type="checkbox"/>	Res 1 (80);	50	100.0 wh	63 h		
- Res 2 (80)	<input type="checkbox"/>	Res 2 (80)					
- Res 1 (80)	<input type="checkbox"/>	Res 1 (80)					

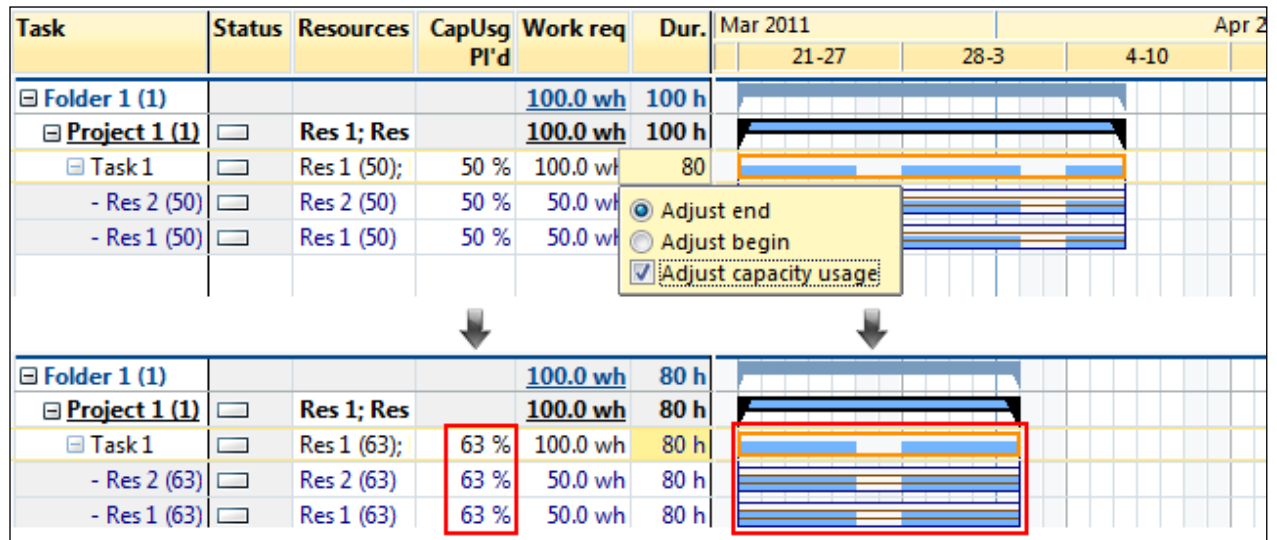
Adjust end
Adjust begin
Adjust capacity usage
No adjustment

Task	Status	Resources	CapUsq PI'd	Work req	Dur.	Mar 2011	Apr 2011
						21-27	28-3
Folder 1 (1)				100.0 wh	100 h		
Project 1 (1)	<input type="checkbox"/>	Res 1; Res		100.0 wh	100 h		
Task 1	<input type="checkbox"/>	Res 1 (50);	50 %	100.0 wh	100 h		
- Res 2 (50)	<input type="checkbox"/>	Res 2 (50)	50 %	50.0 wh	100 h		
- Res 1 (50)	<input type="checkbox"/>	Res 1 (50)	50 %	50.0 wh	100 h		

5. Change duration of the task

Reduce duration of task to 80h and **determine** new **resource workload**.

Result: Workload of both resources = 63

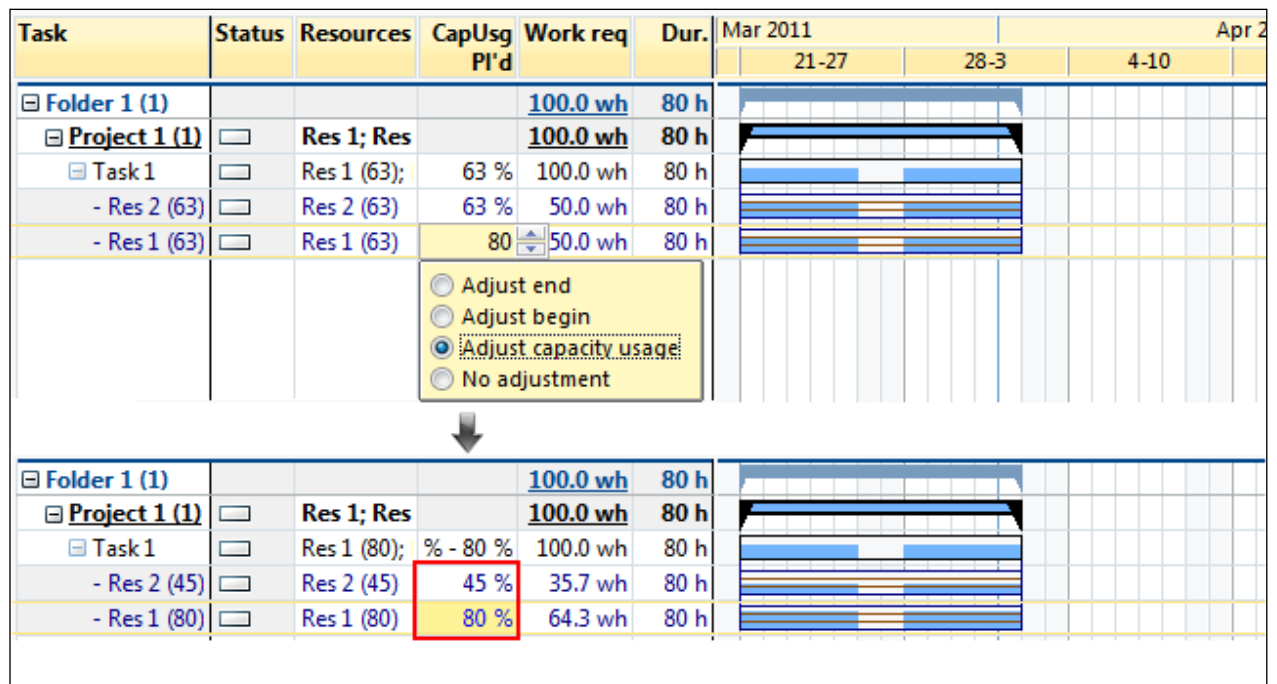


6. Changes of the duration in the Gantt chart

Increase duration by holding down the left mouse button, which initially increases the **planned effort from** 100 h to 131.6 h and thus deviates from the **required effort**.

Select the affected task and adjust the **workload in the Data Gantt Chart** menu and click **Adjust**.

Result: Workload is reduced from 63% to 45% and the **planned effort is** again in line with the **required effort**.



SPECIAL CASES (FLEXIBLE RESOURCE ALLOCATION)

Processing time is less than the duration of a task

When the resource rows (blue) are open, the time bars in the resource rows can be changed within the time frame of the task row and thus a deviating processing time can be set.

When first opened, task and resource times are identical.

If the processing time - i.e. a time bar in one of the blue rows - is to be changed, **press the S key at the same time**. This means that the superordinate task time bar is not moved as well:

Task	Resources	CapUsg Pl'd	Mar 2011 21-27
<input type="checkbox"/> Identify processes	Miller; Stevens	100 %	
- Miller	Miller	100 %	
- Stevens	Stevens	100 %	

Different and, if necessary, several processing times can be entered in the resource rows.

Task	Resources	CapUsg Pl'd	Mar 2011 21-27
<input type="checkbox"/> Identify processes	Miller; Stevens	100 %	
- Miller	Miller	100 %	
- Stevens	Stevens	100 %	

The resulting processing time (or "effort") is shown in the task row.

Note:

The workload entered at a time bar has a higher priority than the workload entered/present in the resources column (see "Utilization of resources / teams

COSTS AND SPECIAL WORKING HOURS

The following factors are considered in determining the cost of time:

Planned working time for the individual tasks

Number of allocated resources

Workload of resources by the task

Resources **working hours**

Cost rates of the resources

Work is calculated from the first four parameters from the top and is then multiplied by the cost rates of the resources assigned to the tasks.

Fixed costs, cost rate of resources

No	Resource/Task	CstRate pld	Fix cst pld.
1	<input type="checkbox"/> Company XYZ (2)	80.00 \$/h	▲ 0.00 \$
2	<input type="checkbox"/> Internal staff (3)	▲ 80.00 \$/h	0 \$
3	<input type="checkbox"/> Stevens (6)	▲ 80.00 \$/h	0 \$
13	<input type="checkbox"/> Schulz (7)	90.00 \$/h	0 \$
24	<input type="checkbox"/> Miller (12)	▲ 80.00 \$/h	0 \$
40	Production	120.00 \$/h	▲ 0.00 \$
41	<input type="checkbox"/> External (1)	▲ 50.00 \$/h	0 \$
42	<input type="checkbox"/> WBA Ltd. (5)	▲ 50.00 \$/h	800 \$

If the same cost rate is to apply to all resources in a group, this is entered in the group row (row 1). Different cost rates (row 13 & 40) can be entered for the respective resources.

Furthermore, it is possible to enter additional costs for each resource, which is incurred once for each task (column **Fix cst pld.**).

Material, other fixed costs

Fixed costs can also be entered directly in the project table without having to create a special resource for this purpose. To do this, insert an additional row and enter only the name and the corresponding amount in the **Fix cst pld.** column.

<input type="checkbox"/> Project 2 (4)	114.8 wd	52,165 \$	1,500 \$	53,665 \$
Milestones	0.0 wd	0 \$	0 \$	0 \$
<input type="checkbox"/> Task 1 (2)	81.9 wd	39,005 \$	1,500 \$	40,505 \$
<input checked="" type="checkbox"/> Task 11 (2)	26.0 wd	16,640 \$	0 \$	16,640 \$
<input type="checkbox"/> Task 12 (1)	55.9 wd	22,365 \$	1,500 \$	23,865 \$
<input type="checkbox"/> Task 13 (5)	55.9 wd	22,365 \$	1,500 \$	23,865 \$
Task 131	13.7 wd	5,465 \$	0 \$	5,465 \$
Task 132	0.0 wd	0 \$	1,500 \$	1,500 \$
Task 133	6.8 wd	2,700 \$		2,700 \$
Task 132	18.0 wd	7,200 \$	0 \$	7,200 \$

Output values (production planning)

When using A-Plan for production, the quantities to be produced **(1)** and the performance values of the resources **(2)** - e.g. in units/hour - can be entered. The required effort **(3)** and thus also the duration **(4)** (see "Required effort" on page 92) are then calculated automatically:

Task	Resource	Qty. Pl'd	Qty/Time Pl'd	Work Req.	Dur.	Mo, 07/06	Tu, 07/07	We, 07/08	Th, 07/09	Fr, 07/10
<input checked="" type="checkbox"/> Sawing	EDC 312	1,500	100/h	15 wh	15 h					
<input checked="" type="checkbox"/> Turning	RDC 316	1,500	50/h	30 wh	30 h					

Base load

One way to map a base load is to create a relatively long task called "Base load", to which all resources with a workload corresponding to their base load are then assigned:

Task	Resources	Workl pld	I 23	II 23	III 23	IV 23	I 24	II 24	III 24	IV 24	I 25	II 25	III 25	IV 25
<input checked="" type="checkbox"/> Examples (3)		20 %												
<input checked="" type="checkbox"/> Base load (3)	Miller (10.0);...	12 %												
Miller	Miller (10.0)	10 %												
Schulz	Schulz (15.0)	15 %												
Stevens	Stevens (12.0)	12 %												

Special costs and working hours

Different costs or working hours for one resource

The Normal calendar can be replaced by other resource calendars in the **Special times** row section by section. They can be used in this row in any order and combination:

Resource/Task	CstRate pld	Default cal.	27	W9	1	2	3	4	5	6	10	8	9	10	11
<input checked="" type="checkbox"/> Internal staff (3)	▲ 80.00 \$/h														
<input checked="" type="checkbox"/> Stevens (7)	▲ 80.00 \$/h	Standard													
Absences															
Special times															

In order for the **Special times** row to be displayed, the **Do not show special times** function must be switched off in the **column settings** (see "Do not show rows" on page 21)!

The resource calendars are created like ordinary time bars by double-clicking at the desired location. Then, after clicking with the right mouse button, the desired calendar can be selected from a list and, if necessary, cost rates deviating from the standard can be specified.

calendarOvertime

In addition to the working times defined by the **default calendar** or in the **special times** row, **overtime** can also be scheduled for each resource in another row.

An **overtime calendar** contains the times that are outside the normal working hours:

Calendar	with effort	Holidays active	Start	End	Dur.	00 01 02 03 04 05 06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21																			
Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>																							
Early shift	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			35.00 h																				
Late Shift	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			35.00 h																				
Overtime	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			44.00 h																				
Monday			04:00	20:00	8.00 h																				
Tuesday			04:00	20:00	8.00 h																				
Wednesday			04:00	20:00	8.00 h																				
Thursday			04:00	20:00	8.00 h																				
Friday			04:00	20:00	8.00 h																				
Saturday			08:00	12:00	4.00 h																				
Sunday																									

An overtime calendar is entered like other calendars as a time bar by double-clicking on the desired location and after creating and clicking with the right mouse button the desired calendar can be selected from a list:

<input checked="" type="checkbox"/> Stevens (7)	▲ 80.00 \$/h	Standard																							
Special times																									
Overtime																									

In contrast to adding a calendar in the Special times/costs row, an entry in the Overtime row does not delete the working times of the calendars in the rows above, but adds additional working times to them.

Entries in the Overtime row generally also apply on public holidays! You must therefore interrupt on public holidays if you do not want to work on them!

Basically, entries in rows further down have a higher priority than the entries in the rows above:

Resource calendars set in the **Special times** row completely replace the **Default calendar** in the covered area.

Working times in the **Overtime** row apply in addition to the working times in the **Special times** row or the **Normal calendar**. If working times lie on top of each other, the cost rate of the **overtime calendar** applies in this area.

Absences override all working hours in the covered area.

GROUP ASSIGNMENT (RESOURCE RESERVED)

If it is not yet known when creating tasks which individual resources will process the tasks or the resources are only to be defined later within the group or area, the resources can first be assigned to **Reserved**.

The **Reserved** resources are visible in the resource table and in the selection list if the corresponding option has been activated:

The screenshot shows a resource selection list on the left and a 'Table_settings' dialog box on the right.

Resource Selection List (Left):

- reigabe
 - Konstruktion (5)
 - Grobentwurf (2)
- .ev. 2: 5/5 | from lev. 3: 70/70
- Resource/Task
- Standort xyz
 - Reserved
- Abteilung 1
 - Reserved
- Projektmanager (2)
 - Reserved
- Hans (6)
- Petra (3)
- Konstruktion (2)
 - Reserved (1)
- Grobentwurf
- Ulf (3)
- Peter (5)
- Verwaltung (3)
- Produktion (1)

Table_settings Dialog (Right):

Table_settings

☐ Project table ☒ Resource table

	Fix	Orig. designation	Act. Designation
▶	<input checked="" type="checkbox"/>	Task	Resource/Task
	<input type="checkbox"/>	Workl. pld.	Workl pld
	<input type="checkbox"/>	Parent task	Parent task
	<input type="checkbox"/>	Default calendar	Default cal.
	<input type="checkbox"/>	Note	Nt.
	<input type="checkbox"/>	Start pld.	Start
	<input type="checkbox"/>	End pld.	End
	<input type="checkbox"/>	Dur. pld.	Duration

☒ Do not show special times ☐ Do not show task rows
☐ Do not show absence rows ☐ Do not show task rows w/o timebar
☐ Do not show workload ☐ Ignore all filters
☐ Show only resources that are present in the project view
☒ Show Resources 'Reserved'

Note: Show and hide columns: Click column title with RIGHT mouse button and 'drag' column caption from list to desired position or vice versa. Changing the order also by 'drag and drop'.

Reserved resources are allocated in the same way as regular resources, but in this case it is also possible to enter the number of **resources required**:

The screenshot shows a resource table with the following columns: Resource, Res. req., Workl. pld., Workl. rem., and Skill.

At the top, there is a dropdown menu showing 'Reserved (150,0)' and a percentage field set to '150,0 %'.

The table content is as follows:

Resource	Res. req.	Workl. pld.	Workl. rem.	Skill
▶ <input checked="" type="checkbox"/> Favorites				
<input checked="" type="checkbox"/> Reserved (Konstrukt...)	1,0	100,0		
▶ <input checked="" type="checkbox"/> Assigned				
<input checked="" type="checkbox"/> Reserved (Konstrukt...)	1,0	100,0		
▶ <input type="checkbox"/> Standort xyz			87,5 %	
<input type="checkbox"/> Reserved				
▶ <input type="checkbox"/> Abteilung 1			87,5 %	
<input type="checkbox"/> Reserved				
▶ <input type="checkbox"/> Konstruktion			50,0 %	
<input checked="" type="checkbox"/> Reserved	1,0	100,0		
<input type="checkbox"/> Peter			100,0 %	
<input type="checkbox"/> Ulf			100,0 %	
▶ <input type="checkbox"/> Produktion			100,0 %	

The 'Reserved' row under 'Konstruktion' is highlighted with a red box, showing 'Res. req.' as 1,0 and 'Workl. pld.' as 100,0.

If the number of required resources entered is greater than the number of resources in the group, this means that **All** resources are required or the specific number is to be determined later:

Resource	Res. req.	Workl. pld.	Workl. rem.	Skill
<input checked="" type="checkbox"/> Favorites				
<input checked="" type="checkbox"/> Reserved (Konstrukt...	All	150,0		
<input checked="" type="checkbox"/> Assigned				
<input checked="" type="checkbox"/> Reserved (Konstrukt...	All	150,0		
<input type="checkbox"/> Standort xyz			81,3 %	
<input type="checkbox"/> Reserved				
<input type="checkbox"/> Abteilung 1			81,3 %	
<input type="checkbox"/> Reserved				
<input type="checkbox"/> Konstruktion			25,0 %	
<input checked="" type="checkbox"/> Reserved	All	150,0		
<input type="checkbox"/> Peter			100,0 %	
<input type="checkbox"/> Ulf			100,0 %	
<input type="checkbox"/> Produktion			100,0 %	

Workload defines the required capacity of the resources used. A workload of 150% means, for example, that a resource with 100% capacity and another with 50% is required, or two resources with 75% each, etc. The actual allocation to the individual resources therefore only takes place when the **Reserved** resource is replaced by "real" resources.

The **Reserved** resource does not increase the capacity of a group, but its utilisation is taken into account in the remaining capacity:

Reserved					Konstruktion
<input type="checkbox"/> Projektmanager (2)					Free capa: 25 %
Reserved					Start: 24.04.2024 09:00:00
<input checked="" type="checkbox"/> Hans (6)					End: 25.04.2024 08:00:00
<input checked="" type="checkbox"/> Petra (3)					

In the example shown here, the total capacity is 200% (= 2 resources), of which 150% is reserved in the period in question, which means that 25% of the maximum 200% is still available. This value is also shown in the selection list of resources as the remaining capacity of the group (see above).

TARGET/ACTUAL COMPARISON, FORECAST

INTRODUCTION

In addition to planning, there is also the possibility of documenting the current status of individual processes within a project.

This is the

- Start act (= start of task)
- Completion rate (%)
- Actual expense
- Forecast expenditure

The 3 last mentioned values are dependent on each other.

If, for example, the **scope of work** and the **actual workload** are entered, this results in the **forecast workload**.

Subsequently, if the **projected effort** is increased, the previous **completion level** is decreased, and so on.

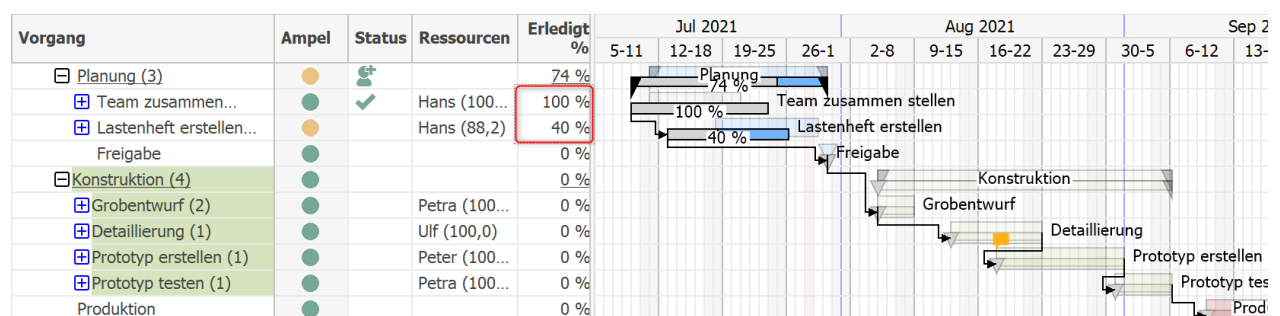
The current data can therefore be used to make statements about the project status, e.g. how the project will progress and whether the set deadlines or costs can be met and, if not, what overruns are to be expected.

This allows problems to be identified at an early stage and action to be taken if necessary.

Notes, handling

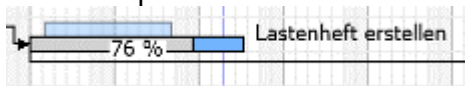
If you want to work with **actual times**, you have to activate the function **Actual vs planed values** in the **Tools** menu. If you want to exclude the possibility of activating the actual times for certain users, this can be done in the user administration under **Functions**.

The actual times can be seen or changed in the Gantt chart by switching on the **'Actual'** mode in the **Start** menu:



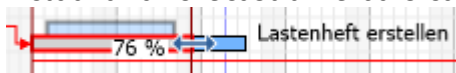
- The planned time bars are displayed transparently in the background, the actual time bars in the foreground.

- If the processing of a task has not yet been started, i.e. no data has been entered for it yet, the associated actual time bar is also displayed transparently.
- The transparency can be set in the options (see Visibility of the plan bars on page 116).
- The left gray part of the actual time bar documents the completed scope, the colored one to the right of it documents the uncompleted scope and the expected deviation from the plan:



In this case, work was started one day ahead of schedule, 76% is done, and there will likely be a delay of about 4 days.

- Actual and forecast time bars can be changed in the same way as plan time bars:



Tasks whose processing has already started - i.e. with completion scope > 0% - are **no longer moved** by existing links. However, direct moving - with the help of the mouse or by changing start/end in the table - is still possible.

Locking planned time bars has no effect on the associated actual/forecast time bar.

With the corresponding setting in the user administration (see "**Create users**" on page 146), you can **prevent** users who should only have access to the actual data from changing **planning data**.

As long as no actual time has been defined (scope of completion = 0%), the **actual time bar is also moved when the associated target time bar is moved**, i.e. in this case its position always corresponds to that of the target time bar.

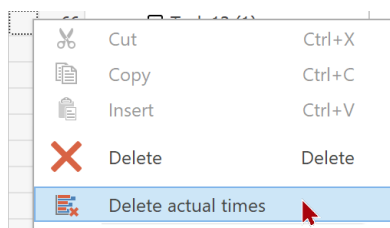
Since **no actual time bar** can be entered **without an existing target time bar**, a target time bar must first be created at the corresponding position for actual times that were not originally planned.

If there are several time bars in one row, the value in the Duration column is = sum of the actual duration of all time bars in this row.

Hint:

The completion scope cannot assume any arbitrary value - especially in the case of short time bars - since the beginning and end of a time bar must always lie on the set time grid (see "Time grid" on page 119).

Delete actual times



Actual times can be deleted after clicking on a row or block.

This sets the **Start Actual**, **End Forecast**, and **Expense Forecast** back to the planned values and the **completion rate** to 0%.

Time tracking

Actual times can also be entered using the optional **time tracking function** (see Time Tracking (optional) on page 205) or imported (see Interface for import of actual times, absences on page 214).

In this case, the actual time bars are displayed with a red frame and their data cannot be changed in the main table of A-Plan, nor in the Gantt chart:

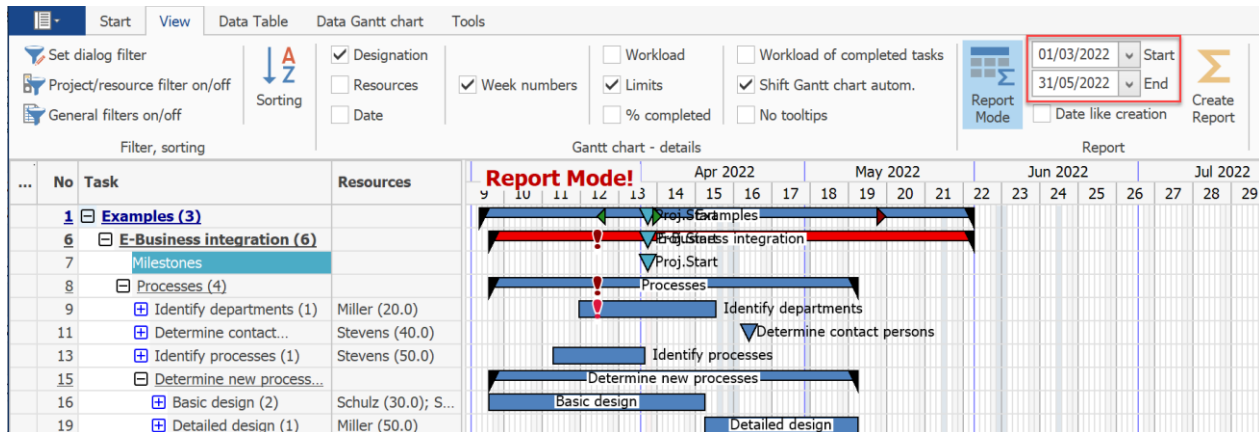


Their data, e.g. **end is**, are not calculated in this case, but taken over from the time tracking!

REPORT MODE, CREATE REPORTS

REPORT MODE

Report mode can be activated in the **View** menu and is used to display only the data of a specific time period:



This is useful if, for example, you do not want to calculate the times to be spent and costs to be incurred for an entire project, but only for **a few months or a quarter**, etc. If this mode is activated, total values are also displayed for the resources, which makes little sense without this mode, since the totals would then represent the complete planning within the database.


Tasks whose times are outside the selected period will not be displayed in the report mode.

The following should be noted when the report mode is active:

- No entries or edits are possible.
- The working times in the Gantt chart menu cannot be opened.
- No link lines are shown.
- **Report mode active** is not saved in the profile.
- At the top left of the Gantt chart, red text indicates that the report mode is active.

CREATE REPORT


For documentation or further processing of the above values, reports can be output to an MS Excel file after clicking the **Create Report** button. The desired time period and the type of report can be defined:



01/03/2022 ▼ Start

31/05/2022 ▼ End

☐ Date like creation



Create Report

Report

Report

Report file

Browse ...

\ReportTest.xlsx

Report template

Browse ...

\Report0.xlsx

Report selection

☒ Task report

☒ Resource report

☒ Capacity curve

☒ with tracked actual times

19/03/2022 00:00 ▼

18/04/2022 00:00 ▼

▼

☒ Show file after creation

Create Report

Cancel

When creating reports, filter settings are also taken into account, so that evaluations for specific sub-scopes are also possible. For example, one of the free columns (see "**Fehler! Verweisquelle konnte nicht gefunden werden.**" on page **Fehler! Textmarke nicht definiert.**) can be used for cost center numbers and then a filter can be set so that only effort and costs of a certain cost center are output.

Task report

The first worksheet of the generated file shows the **task report**:

	A	B	C	D	E	F	G
1							
2			Task Report				
3							
4			Time period: 01/03/2022 to 31/05/2022				
5			Date of report: 06/04/2022				
6							
7			Folders				
8			Projects				
9		Lv. ▾	- Tasks	Completed on	Traffic light	Eff. pld.	Start pld.
10			1 Examples		●	132.6 wh	02/03/2022 12:00
11			2 E-Business integration		●	59.2 wh	04/03/2022 07:45
12		3	- Milestones		●	0.0 wh	02/04/2022 08:00
13		3	- Processes		●	26.8 wh	04/03/2022 07:45
14		4	- Identify departments		●	3.8 wh	20/03/2022 17:00
15		4	- Determine contact persons		●	0.0 wh	20/04/2022 16:00
16		4	- Identify processes		●	6.5 wh	15/03/2022 20:00
17		4	- Determine new processes		●	16.5 wh	04/03/2022 07:45
18		5	- Basic design		●	7.5 wh	04/03/2022 07:45
19		5	- Detailed design		●	9.0 wh	12/04/2022 16:00
20		3	- Topics, contents		●	25.0 wh	10/05/2022 16:00
21		4	- Define topics		●	11.0 wh	10/05/2022 16:00
22		4	- Structuring		●	14.0 wh	10/05/2022 16:00
23		3	- Data processing		●	7.4 wh	08/03/2022 07:45

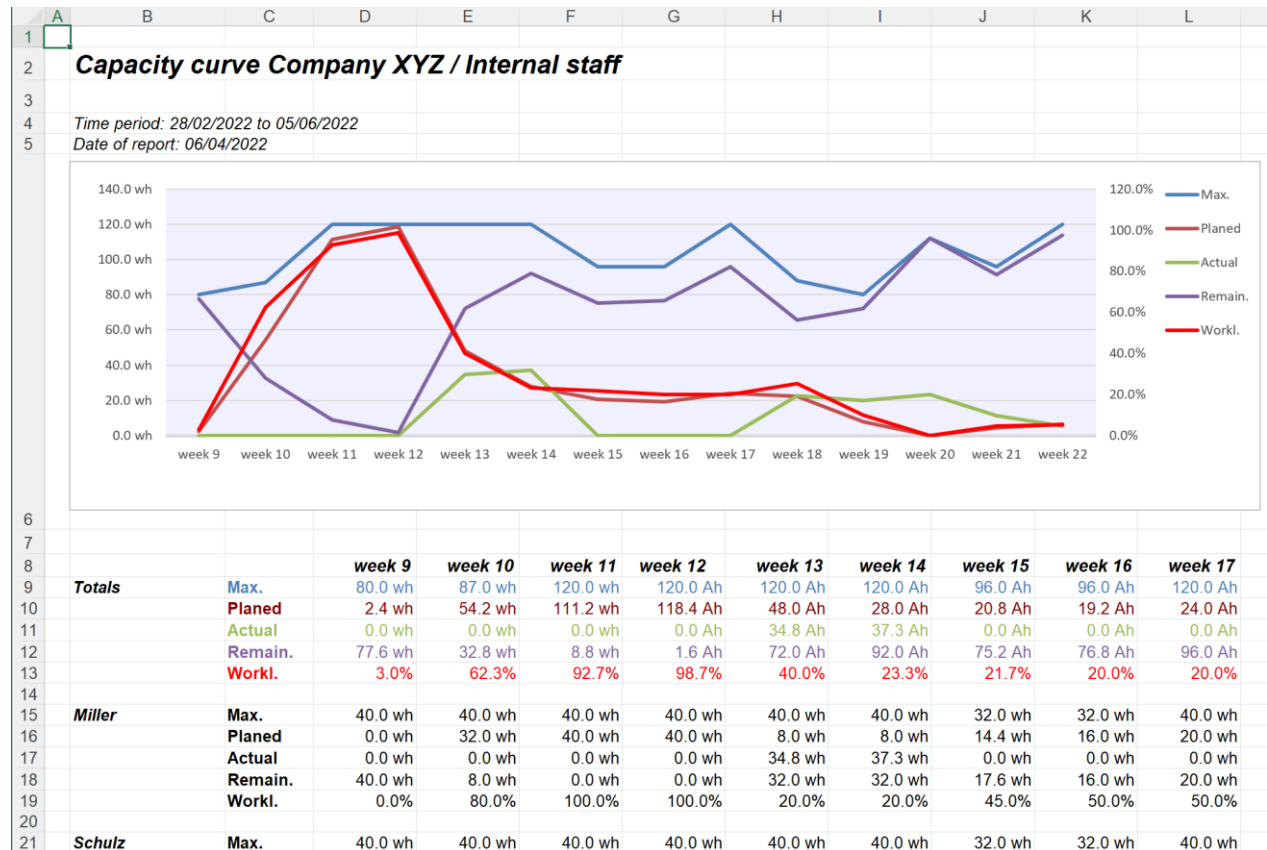
Resource Report

The second worksheet shows the **resource report**:

	A	B	C	D	E	F	G	H
1								
2			Resource Report					
3								
4			Time period: 01/03/2022 to 31/05/2022					
5			Date of report: 06/04/2022					
6								
7			Groups					
8			Resources					
9		Lv. ▾	- Tasks	Parent Task	Workl. pld.	Completed	Start pld.	Dur. pld.
10			1 Company XYZ		24.9%			
11			2 Internal staff		49.8%			
12			3 Stevens		67.5%			
13		5	- Determine contact persons	Processes	40.0%		20/04/2022 16:00	0.0 h
14		5	- Identify processes	Processes	50.0%		15/03/2022 20:00	13.0 h
15		6	- Basic design	Determine new proc	20.0%		22/03/2022 16:00	15.0 h
16		5	- Task 11	Task 1	100.0%	26/03/2022 12:02	08/03/2022 06:00	13.0 h
17			3 Schulz		20.0%			
18		6	- Basic design	Determine new proc	30.0%		04/03/2022 07:45	15.0 h
19		5	- Choose hardware	Data processing	20.0%		17/03/2022 07:45	17.0 h
20		5	- Purchase hardware	Data processing	10.0%		08/03/2022 07:45	40.0 h
21			3 Miller		62.0%			
22		5	- Identify departments	Processes	20.0%		20/03/2022 17:00	19.0 h
23		6	- Detailed design	Determine new proc	50.0%		12/04/2022 16:00	18.0 h
24		5	- Task 11	Task 1	100.0%	26/03/2022 12:02	08/03/2022 06:00	13.0 h
25		5	- Task 21	Task 2	15.0%		25/05/2022 12:45	3.4 h

Capacity curve

In the case of capacity progression, a further separate worksheet is generated for each resource group in the Excel file. Above the tabular representation of the entire group and individual resources, a diagram is generated in each case, which shows for the group the course of the maximum available capacity (taking into account working times, absences, etc.), the course of the already scheduled, the already worked (**Actual**), the still available **Remaining capacity** and the **Workload**:



Layout of task and resource report

As a **template for the** output to the Excel file the file "**Report0_en.xlsx**" is used, which is copied to the main directory of A-Plan during the installation ("...\c:\Program Files\A-Plan X"):

	A	B	C	D	E	F
1			don't delete the first 2 rows, see note	Completed on	Traffic light	Eff. pld.
2			Task Report			
3						
4			Time period:		●	
5			Date of report:		●	
6					●	
7			Folders			
8			Projects			
9		Lv. ▾	- Tasks	Completed on	Traffic light	Eff. pld.
10			0 Total			
11			1 Folder 1			
12			2 Project 1	31/12/2010 08:00		1234.5 wh
13		3	- Task 1	31/12/2010 08:00		1234.5 wh
14			Actual time 01			
15						

Task report | Resource report | Capacity Team 1 | (+)

The layout of the template file and thus the report output can be **adapted to** the existing requirements for the **activity** and **resource report** as far as possible. But please make sure that you use a copy of the file for this purpose, so that you do not overwrite the original! The following elements or properties can be **changed**:

Fonts and sizes,

Cell formats (e.g. number of decimal places),

Width of the columns,

Height of the rows,

Deletion of unnecessary columns starting from column "D",

Sequence of columns starting from column "D",

Texts,

Rows, frames

Not to be changed:

Content of the 1st row (A-Plan needs the labels for the identification of the columns, they are not output when creating the report)

Position of the rows (so no rows may be deleted, moved or added!)

Worksheets order

Text "Capacity Team 1" in the designation of the 3rd worksheet (will be replaced by current designations of the respective team during report generation).

OPTIONS

CALLING THE OPTIONS

The dialog window for setting the options is opened by pressing the **Options** button in the **Tools** tab.

VIEW SETTINGS

The settings under **View** are saved in the **profiles** (see "Saving the settings in profiles" on page 128), so that different settings can be recalled here.

Gantt chart

The screenshot shows the 'Options' dialog window with the 'View' tab selected. The left sidebar lists various settings categories: 'View' (expanded), 'Gantt chart' (selected), 'Time bars', 'User settings', 'General settings', 'Colors Gantt chart', 'Messages / Orientation', 'Start behavior', 'Basic settings', 'Planning period', 'Costs / Abbreviations', 'Pattern individual', and 'Pattern priority-dependent'. The main area displays the 'Gantt chart' settings. Under 'Designation of holidays', there are three options: 'Display' (checked), 'All' (radio button), and 'From 2 pixel width' (radio button). Under 'Visible time window', there are two dropdown menus showing '08:00' and '16:00' with a 'to' label in between.

Names of the holidays

The designations of the **public holidays** (see "Holidays" on page 125) can be displayed or hidden.

The following options are available:

Show names of **All holidays**.

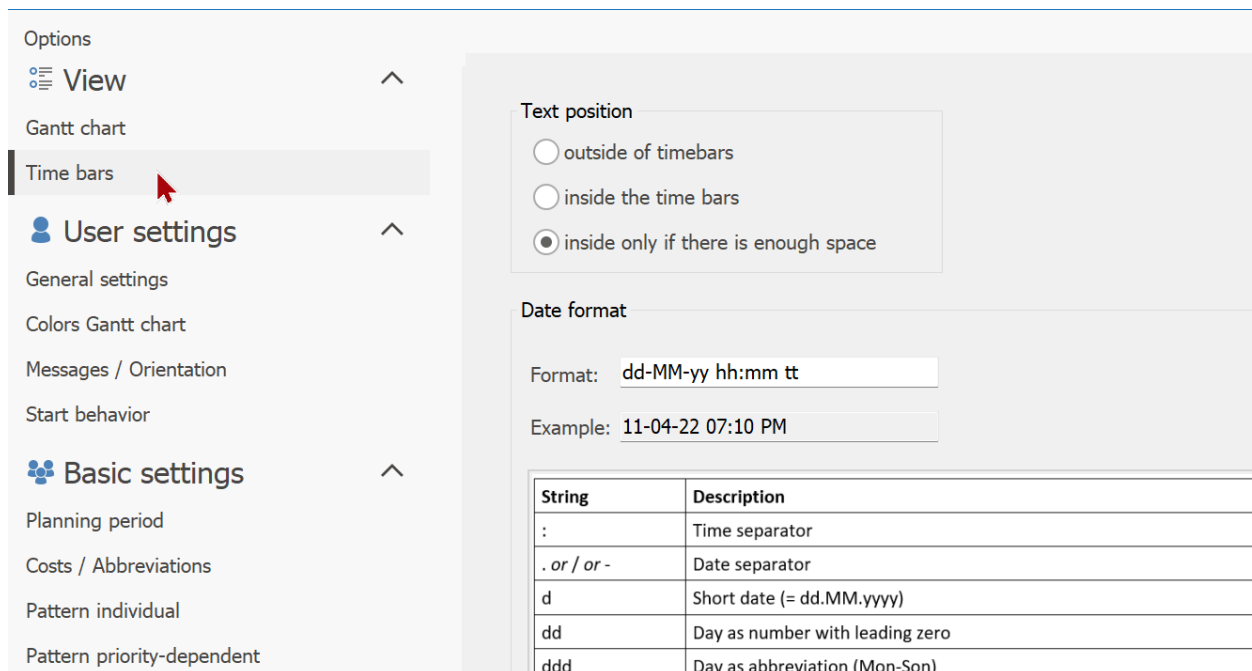
Show designations of holidays **From 2 pixels display width**. In this case, the labels will be displayed only if the stroke indicating the holiday at least is 2 pixels width.

All designations **hidden**.

Visible time window

The **visible time window** is used to set the times at which a day begins and ends in the Gantt chart. It should be selected in such a way that the times to be set lie within this range, since times that lie outside this range cannot be set with the mouse arrow.

Time bar



String	Description
:	Time separator
. or / or -	Date separator
d	Short date (= dd.MM.yyyy)
dd	Day as number with leading zero
ddd	Day as abbreviation (Mon-Son)

Text position

If texts are to be displayed with the time bars (see **View** menu), they can generally be displayed **outside**, i.e. behind the time bars, generally **inside the time bars** or only inside the time bars if the respective time bar is **long enough for** this. In the second case, the text overlaps at the front and back if the time bars are too short.

Date format

When outputting the date of the beginning and end of the time bars, the format for this can be specified.

The most important characters for setting the output format are the following:

d	Day	h	Hour
w	Week	m	Minute
m	Month	tt	12 hours display
yy	Year		

Examples (03/04/2022, 01:45 PM):

"d/m"	3/4
"dd/mm/yy"	03/04/22

"hh:mm tt"

01:45 PM

"mm/dd/yyyy h:mm tt"

04/03/2022 1:45 PM

For a complete set of all formats, see the list in the dialog box.

USER SETTINGS

The **user settings** are **higher-level settings** that - in contrast to the basic settings (see "Basic settings" on page 119) - can be set **individually by each user**. They always apply to the respective user, regardless of the profile used.

General settings

Default values for new entry

The values set here are used when entering new tasks or time bars.

Priority

The value set here will be applied when entering a new task row.

Length of time bar

Double-clicking on the Gantt chart creates a new time bar that starts at the position of the mouse pointer and has the duration set here.

With the option adjusted to resolution the length of the time bar depends on the step size with which the mouse arrow is moved over the Gantt chart. For example, at the Year resolution, a new bar will have a length of one working day (see below), at the Day short resolution it will have a length of 2 hours, and at 10 minutes it will have a length of 1 minute.

If 1 workday has been set as an option, the time bar always starts with the set work start when a new entry is made and ends with the work end of the default calendar (see "Create resource calendar" on page 85).

The Fixed duration option allows you to specify the default length in days, hours and minutes.

Automatically create time bar at new task

When inserting a new task, a time bar is automatically created in the middle of the Gantt chart. The length of this time bar corresponds to the setting under **Length of time bar** (see above).

Resource workload

When assigning resources the workload value defined here is used by default.

Font (table / Gantt chart)

The font and font size set here are used for the table and the Gantt chart for both the screen view and the printout.

Language

Setting the language of the programme interface, the messages and the manual.

Colors Gantt chart

Options

View

Gantt chart

Time bars

User settings

General settings

Colors Gantt chart

Messages / Orientation

Start behavior

Basic settings

Planning period

Costs / Abbreviations

Pattern individual

Pattern priority-dependent

Colors Gantt chart

4

Contrast (0-5)

2

Visibility of planned time bars when actual time bars are displayed (0-5)

title			
Weekend	Background	Today	Holiday
Folder row			

(Change after click)

Default Colors

Clicking on the element to be changed opens a dialog box in which the desired color can be selected and accepted by pressing **OK**. The standard colors of A-Plan can be set by clicking the corresponding button.

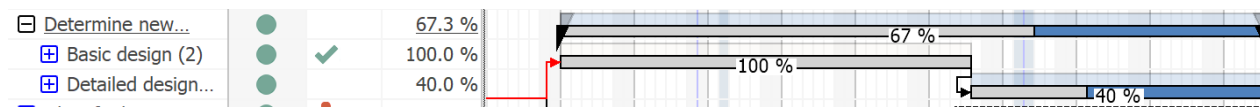
Contrast

To adapt to different monitors or personal preferences, in addition to the color of the background, the **contrast** between the dividing lines can also be adjusted in 6 levels:

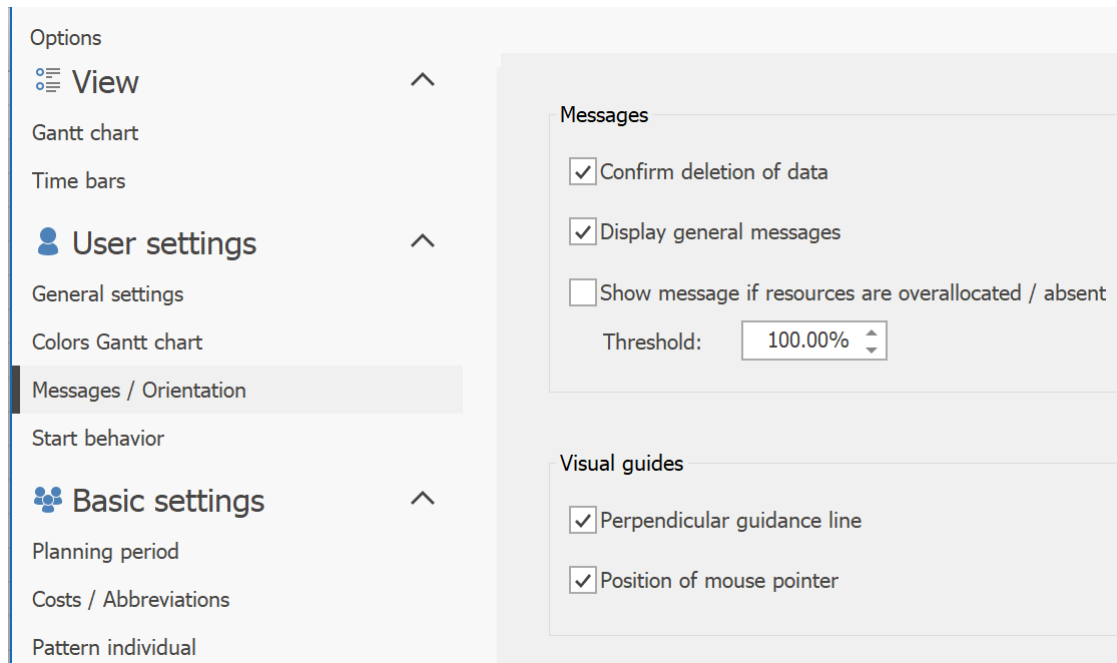
Contrast = 0	<div> <div>+</div> <div>Basic design (2)</div> </div> <div> <div>+</div> <div>Detailed design...</div> </div>	
Contrast = 2	<div> <div>+</div> <div>Basic design (2)</div> </div> <div> <div>+</div> <div>Detailed design...</div> </div>	
Contrast = 5	<div> <div>+</div> <div>Basic design (2)</div> </div> <div> <div>+</div> <div>Detailed design...</div> </div>	

Visibility of the plan bars

When '**Actual**' **mode is** activated (see Target/actual comparison, forecast on page 103), the plan bars are displayed behind the actual time bars with a transparency that can be set here:



Messages / Orientation



Messages

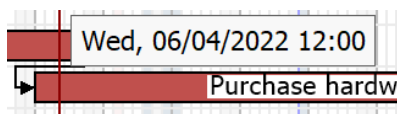
Confirm deletion of data

With active deletion of data confirm, before deleting data you will be asked if you really want to delete the data (= protection against accidental deletion).

General messages

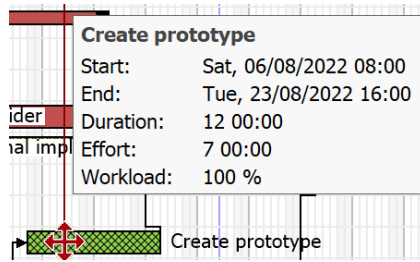
If you have enabled this option, you will receive appropriate notifications depending on the action.

Visual guides



For easier positioning of the time bars, a vertical guide line is displayed at the tip of the mouse pointer. is displayed at the tip of the mouse pointer.

If these lines bother you, you can hide them.



Also the field with the display of the current position of the mouse pointer can be hidden. In this case it will be displayed only when changing a time bar (start, end or position).

Startup behavior / Email / Synchron. of absences

Options

- View
- Gantt chart
- Time bars
- User_settings
- General settings
- Colors Gantt chart
- Messages / Orientation
- Start behaviour / e-mail / synchronize absences
- Basic settings
- Planning period
- Costs / Abbreviations
- Pattern individual
- Pattern priority-dependent
- Time tracking
- Holidays
- Master database / security / server directory

Start behavior

- ☒ Open last file automatically
- ☐ Display current day in Gantt chart

Email settings

Sender address:

CC:

- ☒ Copy of emails to sender
- ☒ Use own e-mail server

Outgoing mail server: Port:

User name:

Password:

Synchronising absences with MS Outlook

- ☐ Absences synchronize

Synchronize each minutes

Category(s) in MS Outlook:

- ☐ Schulung
- ☒ Urlaub
- ☐ Geburtstage
- ☐ A-Plan
- ☒ Krank

Open last file automatically

If this option is enabled, the database you last worked with will be loaded automatically when you start A-Plan. If this database is not found, a new - empty - database will be created.

You should switch off this option if there are longer waiting times when starting A-Plan while working in the network (e.g. because the whole network is searched for the database).

Display current day in Gantt chart

If this option is enabled, when A-Plan is invoked, the Gantt chart is set so that the current day is in the visible area. If it is disabled, the left border of the Gantt chart will be set as it was when the settings were last saved.

Email settings

To be able to send emails from A-Plan (see "Sending emails" on page 45), the settings specified here must be made.

Synchronize absences

It is possible to synchronize absences (see „Absences“ on page 87) with personal calendar entries in MS Outlook. The **categories of MS Outlook** whose entries are to be synchronised can be defined. The time interval for synchronization can also be specified.

Notes:

- The absences of the resource whose **name matches the logged-in user** are synchronized. If the login name differs from the resource name, the resource for which absences are to be synchronized can be specified as described under "Group / Resource" on page 209.
- Synchronization can only take place with the **respective personal calendar**.
- **All entries** in the **absences row** of the resource concerned are synchronized.

BASIC SETTINGS

Basic settings are settings that are **always** valid **for all users of a database**.

Planning period / Time grid

Options

View

Gantt chart

Time bars

User settings

General settings

Colors Gantt chart

Messages / Orientation

Start behavior

Basic settings

Planning period

Planning period / Time grid

Start of planning period: 12/04/2012

End of planning period: 12/04/2042

Time grid: 15 minutes

Important:
The planning period and the time grid, with which all calculations of A-Plan are done, influence the performance of A-Plan. Therefore, the planning period should not be significantly larger and the time grid should not be finer than necessary.

In addition, each user can individually set the '**Earliest end date**' in the '**dialog filter**', which prevents plans from being read in that were completed before the date set there.

Planning period

Since the entire planning period must be taken into account for some internal calculations, it is necessary to define this period for performance reasons. It should at least cover the entire period required within the database and should not take into account any excessively large reserves in the process.

Time grid

The time grid determines the step width in which time points are entered and displayed and calculations are performed. Possible values are

5, 10, 15 or 30 minutes,

1, 2, 3, 4 or 6 hours or

Day / 8 hours, Day / 12 hours

The setting should be selected so that the shortest time intervals that occur in your planning can just be displayed. For example, if you generally plan only in hours or even days, set **1 hour or day**, respectively.

The coarser the time grid selected, the faster internal calculations are performed (**1 hour** instead of **1 minute**, for example, results in approx. 30% speed gain), and settings can also be made more easily and quickly, since unwanted intermediate values can neither be set nor displayed. The latter is a great advantage especially when setting times in the Gantt chart.

With both **Day / 8 hours** and **Day / 12 hours**, A-Plan no longer "knows" hours, but all calculations and displays are always in whole days. The difference between **Day / 8 hours** and **Day / 12 hours** is only that when using hourly rates, which is not recommended, these are extrapolated for a day to 8 or 12 hours. However, it is advisable to

specify not hourly but daily rates for the costs in the **Day ...** setting, then it does not matter which of the two settings is used.

Notes:

When **changing the time grid of** an existing database, **no values in the database** are **changed**, but existing values are displayed or printed etc. according to the selected time grid. However, **newly entered values** will be adjusted if necessary so that they lie on the time grid.

calendar

Costs / Abbreviations

Options

View

Gantt chart

Time bars

User settings

General settings

Colors Gantt chart

Messages / Orientation

Start behavior

Basic settings

Planning period

Costs / Abbreviations

Pattern individual

Pattern priority-dependent

Time tracking

Holidays

Master database / security / server directory

Duration / Effort*

Unit duration:

Day(s)

Unit Effort:

Day(s)

Abbreviations

Currency:

\$

Effort:

w

Resource:

rs

Minute:

m

Week:

w

Hour:

h

Month:

m

Day:

d

Year:

y

Cost rate*

Unit of time:

Hour(s)

Default cost rate:

50.00 \$/h

Important:

The default cost rate affects ALL costs for which a cost rate was not explicitly specified in the assigned resources!
The recalculations of the affected costs are done after closing the option window.

* Default values used if no different values are entered in the main window table.

Duration / Effort (time unit)

The value selected here is used by **default** together with the **abbreviation** for the **effort if**.

Abbreviations

Abbreviations used in the table of A-Plan for both the display and the printer. Any abbreviations can be used and they have no influence on calculated values.

Cost rate (time unit, cost rate)

The values entered here are used by **default if** no special value has been entered for a **resource** in the main table (see "Fixed costs, cost rate of resources" on page 97).

The following values are available for the time unit to which the costs are to be related:

Minute

Hour

Day

Week

Month

Year

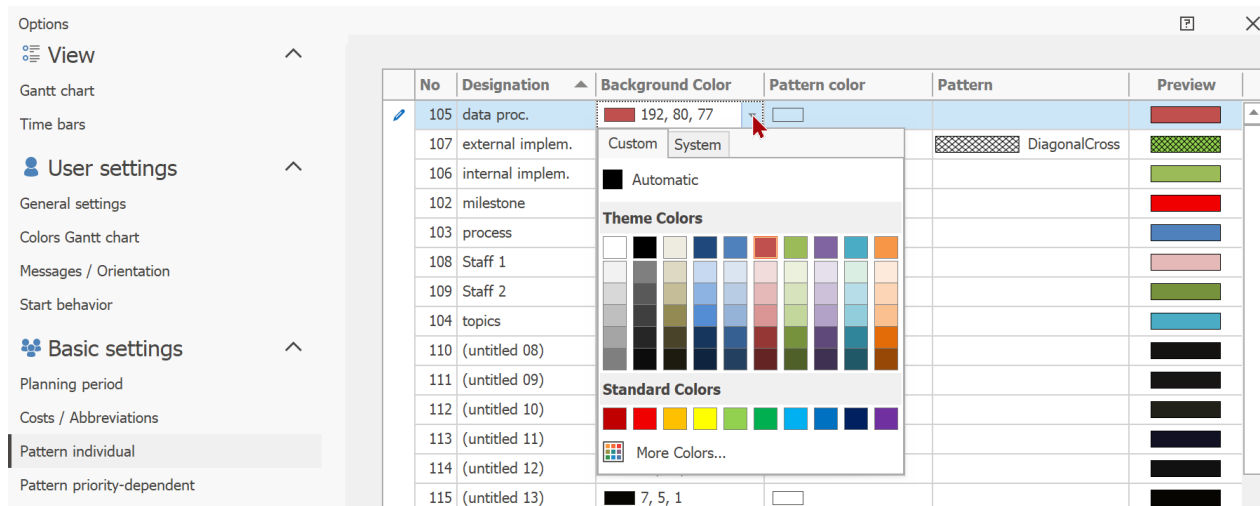
For the representation of the corresponding values, the characters (sequences) entered for **abbreviations** are used.

Bar pattern

The patterns (and colors) for the time bars are divided into **individual** and **priority-dependent patterns**. **patterns** (or colors) are distinguished.

Individual pattern

Each individual time bar can be assigned an **individual pattern**, and the palette available for this can be specified in the following dialog box:



Set the pattern

Any number of named patterns can be defined, each consisting of 3 components:

- Background color
- Pattern color and
- Pattern

These patterns can be defined using the Pattern dialog box (see "Colors / Patterns" on page 51) and .

Then, by clicking on a **pattern** and a **foreground** and **background color**, you can make the desired assignment.

Priority dependent patterns

If no **individual pattern** has been assigned to a time bar, a **priority-dependent pattern** is displayed (see "Priority dependent patterns" on page **Fehler! Textmarke nicht definiert.**). For example, if a red color has been selected as the pattern for priority 2, all bars belonging to a project or task with priority 2 will be displayed in red.

You can set a specific pattern for **each priority**, and also one for all **completed time bars**:

Options

View

Gantt chart

Time bars

User settings

General settings

Colors Gantt chart

Messages / Orientation

Start behavior

Basic settings

Planning period

Costs / Abbreviations

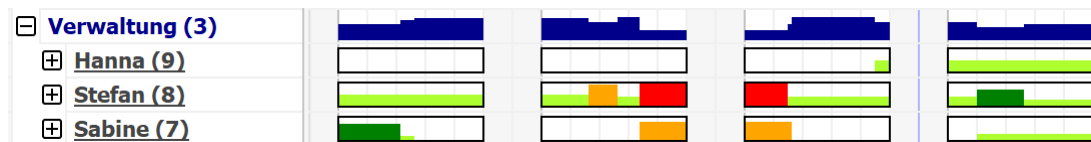
Pattern individual

Pattern priority-dependent

No	Design...	Background Color	Pattern color	Pattern	Preview
1	Compl.	238, 236, 225			
2	Priority 00	79, 129, 189			
3	Priority 01	146, 208, 80			
4	Priority 02	79, 129, 189			
5	Priority 03	Black			
6	Priority 04	Black			
7	Priority 05	Black			
8	Priority 06	Black			
9	Priority 07	Black			
10	Priority 08	Black			
11	Priority 09	Black			
12	Priority 10	Black			
13	Priority 11	Black			
14	Priority 12	Black			

Resource workloads (colors, percentages)

As explained in the chapter "Display / create resources" on page 84, different colors are used depending on the workloads of the resources:



If other colors or bounds are to be used, the desired values can be set in the options. The values shown here are the default settings:

Options

View

Gantt chart

Time bars

User_settings

General settings

Colors Gantt chart

Messages / Orientation

Start behaviour / e-mail / synchronize absences

Basic settings

Planning period

Costs / Abbreviations

Pattern individual

Pattern priority-dependent

Resource workloads (colours, percentages)

Time tracking

No	to wor...	Color
0	Absence	DarkGreen
1	50 %	GreenYellow
2	70 %	Green
3	90 %	Orange
4	100 %	OrangeRed
5	> 100 %	DarkRed

Delete selected color

New color

In the first line, the colour of the absences can also be changed if required.

Time tracking

When using time tracking (see "Time Tracking (optional)" on page 205), 2 basic settings can be set here:

The screenshot shows the 'Options' dialog box in A-Plan X. The left sidebar contains a tree view with categories: Options, View, Gantt chart, Time bars, User_settings, General settings, Colors Gantt chart, Messages / Orientation, Start behaviour / e-mail / synchronize absences, Basic settings, Planning period, Costs / Abbreviations, Pattern individual, Pattern priority-dependent, Resource workloads (colours, percentages), Time tracking (selected), and Holidays. The main area is divided into two sections: 'Time tracking' and 'Actual times Import'. The 'Time tracking' section has two checkboxes: 'Actual times may only be entered via time tracking' (unchecked) and 'Do not take over actual times of completed tasks from planned time, if no times have been entered yet' (unchecked). The 'Actual times Import' section has a 'Files' list box containing '\\Server2\A-Plan\Daten\tracked\times*.xlsx'. Below this is a 'Check for new file each' dropdown set to '30 min'. There are three checkboxes: 'Cancel if error occurs' (unchecked), 'Do not show messages during automatic import' (checked), and 'Do not delete overlapping times' (unchecked). At the bottom is a 'User who should read in actual times' dropdown menu.

Actual times may only be entered via time recording

It is not possible to enter actual times in the main table of A-Plan, as only values entered in the time tracking dialog ("Time Tracking (optional)" on page 205) are to be taken into account.

Do not take over actual times of completed tasks from planned times, if no times have been entered yet

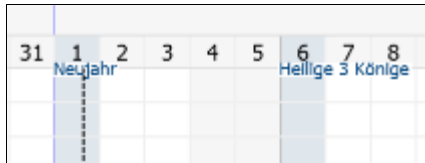
By default, the planned times are taken over as actual times for tasks that are completed but for which no actual times have been entered. If this option is active, the value "0 wh" remains if no actual times are entered.

Actual times import

For description see chapter "Interface for import of actual times, absences" on page 214.

Holidays

Besides weekends, any interruptions can be taken into account when calculating times. These can be holidays, but also interruptions of any length. In the Gantt chart, the holidays or interruptions are displayed in dark gray by default:



Note:

Starting from the resolution "Month" (see chap. "Resolution of the Gantt chart" on page 34), the holidays are no longer displayed, since they would be too close together at these resolutions.

In the table of the **Holidays** dialog window, the holidays or work interruptions can be managed:

Designation	Start	End	Dur.	a...	a...
New Year	01.01. 00:00	02.01. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Holy 3 Kings	06.01. 00:00	07.01. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Labor Day	01.05. 00:00	02.05. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
National Holiday - AU	01.05. 00:00	02.05. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
National Holiday - CH	01.08. 00:00	02.08. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Assumption Day	15.08. 00:00	16.08. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
German Unity Day	03.10. 00:00	04.10. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
National Holiday - AU	26.10. 00:00	27.10. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reformationstag	31.10. 00:00	01.11. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
All Saints' Day	01.11. 00:00	02.11. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Immaculate Conception	08.12. 00:00	09.12. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Christmas Eve	24.12. 12:00	25.12. 00:00	00 12:...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Christmas Day	25.12. 00:00	26.12. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2nd Christmas Day	26.12. 00:00	27.12. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
St. Stephen's Day	26.12. 00:00	27.12. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
St. Stephen's Day	26.12. 00:00	27.12. 00:00	01 00:...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Good Friday	06/04/2012 ...	07/04/2012 ...	01 00:...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Easter Sunday	08/04/2012 ...	09/04/2012 ...	01 00:...	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Holiday calendar

DEUTSCHLAND (default)

☒ Default calendar

New Calendar

Delete calendar

New date

Delete time bar(s)

Select all

Deselect all

☐ Hide deactivated

The list of holidays contains all holidays that are available in the current database, which may include different countries or states.

For the resources, it is then possible to specify which **holiday calendar** is valid for the respective resource:

Resource/Task	Holidays
<input type="checkbox"/> Company XYZ (2)	
<input type="checkbox"/> Internal staff (3)	
<input checked="" type="checkbox"/> Stevens (20)	DEUTSCHLAND
<input checked="" type="checkbox"/> Schulz (16)	BAYERN
<input checked="" type="checkbox"/> Miller (17)	SCHWEIZ

By default, the holiday calendar that has been marked as the **default calendar** in the options window is used.

The assignment of the holidays to the selected holiday calendar (top right of the dialog box) is done by placing a check mark in the **active** column.

If you want to display only the holidays that belong to the selected holiday calendar, you can hide the others using the **Hide disabled option**.

New holiday calendar

Using the **New calendar name** function, any other holiday calendars can be created and the desired holidays can be assigned by clicking in the "active" column.

Enter new appointment

After pressing the **New appointment** button, a new row is added to the table and an input field for the designation is opened.

Then click on the existing value in the **Start** column. You can now change the date.

Then you can enter the end of the interruption in the same way.

If the interruption is to be repeated annually, activate the **Repeat annually** check box.

Annual appointments can be recognized by the missing year numbers.

Delete appointments

Click the corresponding row and press the **Delete** button.

Master database, security, server directory

Options

View

Gantt chart

Time bars

User settings

General settings

Colors Gantt chart

Messages / Orientation

Start behavior

Basic settings

Planning period

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Pattern individual

Pattern priority-dependent

Time tracking

Holidays

Master database / security / server directory

Master database

\\Mac\Home\Documents\A-Plan\APlan16\Daten\Expl_Project_planning.apldb (MS Access)

☒ Current database is master database

Only in the master database information about global directories (backup copies, server directory) and license data is stored.

This prevents by opening another database - e.g. another department or another company - the mentioned settings are overwritten.

Backup copies

Directory for backup copies

\\Mac\Home\Documents\A-Plan\Backup

Browse ...

Backup every 5 min

☐ No A-Plan backup copies

Available backup copies:

- the last 10
- 1 per day of the last 7 days
- 1 per week of the last 4 weeks
- 1 per month of the last 12 months

If you use a SQL database, you can alternatively use the backup function of the SQL server.

A new backup copy will only be created if the entered time span has expired AND at least one edit has been made!

Server Directory

U:\TestDaten

Browse ...

Directory for license file 'aplanX.lic', ini files, like 'options.ini'.
All users must have at least read permission for this directory.

Master database

The settings for the **backup copies**, the **server directory** and the **license information** generally apply to all users and databases. To ensure that these settings are available to all users, they are stored in the **server directory**. For this it is necessary that the server directory is known on the computers of the users. It is therefore stored after the definition in the database and saved with the users by opening this database on the respective computer (file "config.sys" in the A-Plan client directory 'documents\A-Plan'). So that this information is not inadmissibly overwritten by opening other databases - e.g. from another department or another company - it is taken over only from a certain database, namely from the **master database**.

If no master database has been defined yet, the first database opened by a user with master rights becomes the master database. If you want to use another database as the master database, uncheck the **Current database is master database checkbox** in the master database and then open the desired database, making it the new master database.

Important:

The information of the master database is available to other users only after they have opened it at least once!

Backups

At the interval set for **Save every** ... minutes, a compressed backup copy of the current database is automatically created as a zip archive. This is done even if the database is opened by several users. If no change has been made to the database since the last backup, the creation will be delayed until a change has been made. This prevents several identical backups from being created in succession.

For the backup copies, a separate directory is created for each database below the directory set in the dialog window. The individual backup copies are given the name of the database with the date and time appended, e.g. "Name 2020-02-20 14-45.zip".

Backup copies can be opened again like normal A-Plan databases after unpacking the zip archive.

The settings for the security copies require master authorization and are only possible in the master database (see above).

Server directory

If central files, like the "Options.ini" or ini files of a special solution must be accessible to all users, the A-Plan server directory is used for this purpose. The license information is also stored in the server directory so that it does not have to be entered for each user.

Setting this directory requires master authorization and is only possible in the master database (see above).

SAVING THE SETTINGS IN PROFILES

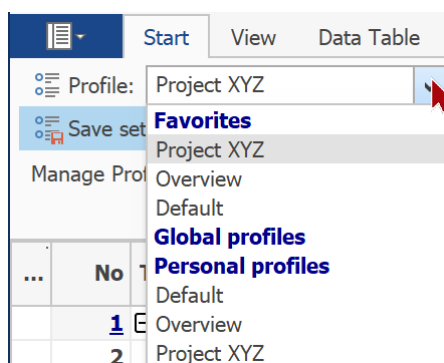
To avoid having to constantly re-enter every combination of settings, each user can save as many individual profiles as desired. In the profiles, not only the settings of the main window and the options, but also the print settings are saved.

Important:

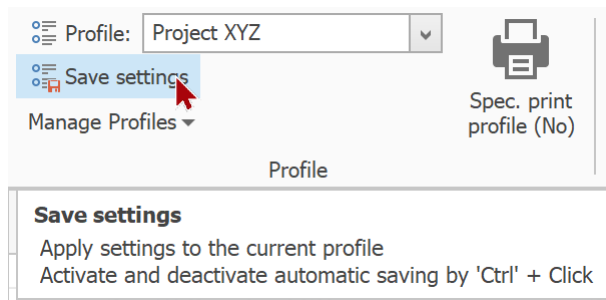
No data is stored in the profiles, only settings! Therefore, if you enter or delete data under a certain profile, this will also affect the data stock of all other profiles!

Since the profiles are stored directly in the database, they are available even if a user opens the database from another computer.

Working with profiles

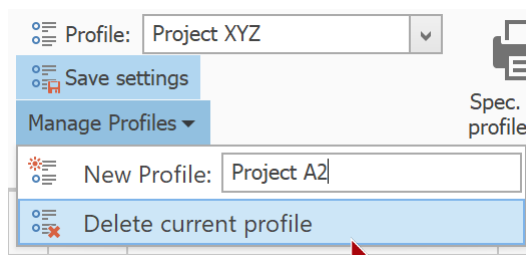


The existing profiles are displayed in the **Start** tab and can be called up there with a mouse click.



Changes to the settings are applied to the current profile by the **Save settings** function.

If all changes are to be applied automatically, the button can be snapped into place by clicking on it while holding down the CTRL key.



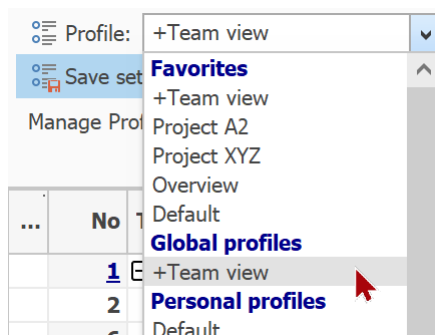
With the menu item **Manage Profiles** new profiles can be created or the current one can be deleted.

Global profiles (multi-user version)

In addition to the personal ones, **global profiles** can also be created in the multi-user version of A-Plan, so that certain profiles only have to be created once and are then available to all users. To protect them from accidental or unauthorized changes, they can only be created and modified with **master rights**.

Like the personal profiles, the global profiles can be created by entering the desired name under **Manage profiles** and pressing the ENTER key. To distinguish them from the personal profiles, their names must be preceded by a "+".

In the list of profiles, the global ones are displayed in a separate block:



If a global profile is selected by a user without master rights, settings can be changed temporarily, but these are not saved when the profile is changed or when A-Plan is closed, so that the original settings are available again the next time the profile in question is selected.

PRINT

GENERAL NOTES ON PRINTING

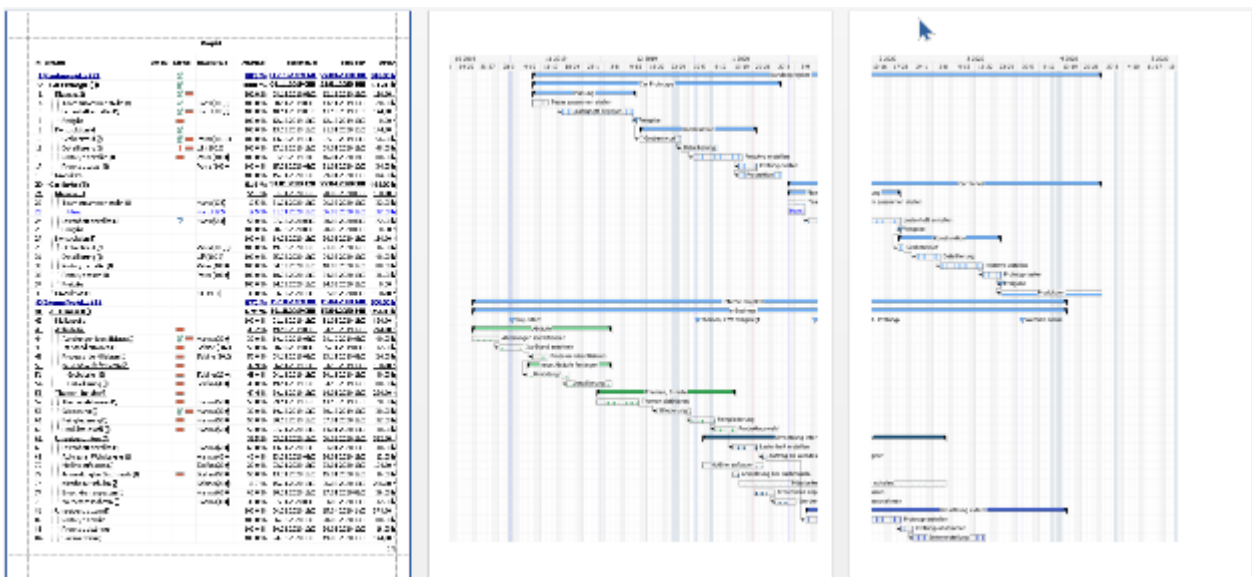
Form of expression

The printout of the data is done in the same way as the display on the screen except for the time range, which can be selected independently.

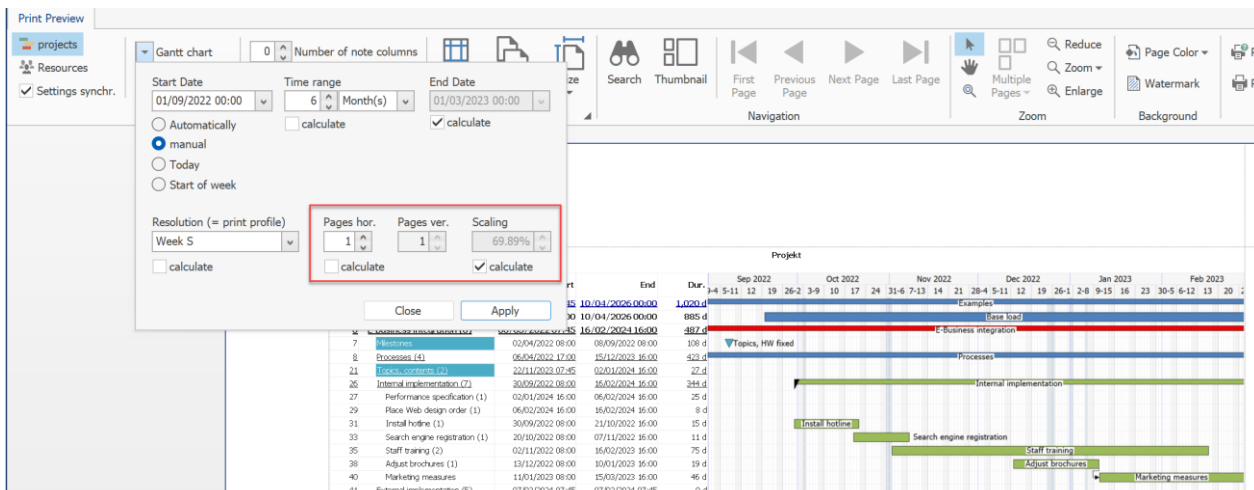
If you need different settings for the printout than for the screen display, you can save this setting as a print profile (see "Print profile" on on page 131).

Size of the printing area

A-Plan can use all formats supported by your Windows printer or plotter. If the table and the Gantt chart do not fit on one page, the printout is also split into several pages - similar to MS Excel:



The printout can also be scaled to fit on a page, for example:



Manual page break

Resource/Task	State
[-] Internal staff (3)	
[+] Stevens (20)	
[+] Schulz (16)	
[+] Miller (17)	

If a new page is to start before a certain row during printing, this row can be provided with a manual page break. In this case, a corresponding symbol is displayed in the status column.

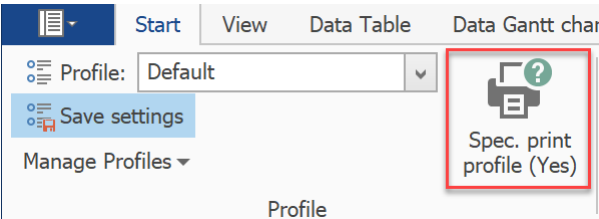
You can activate this option if you first right-click the leftmost row and then select the **Insert Page Break** item in the context menu.

PRINT PREVIEW, PRINT SETTINGS

Print profile

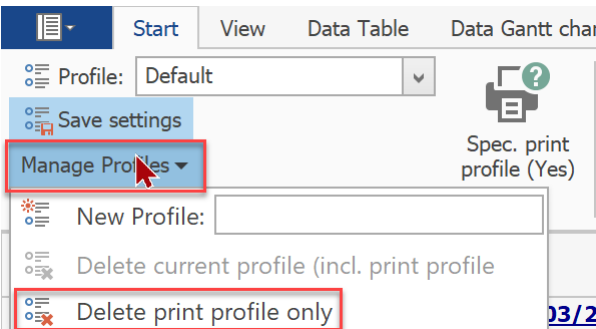
As far as possible, the existing settings on the screen are used for the printout.

However, since different settings are often required for the printout than for the screen display, e.g. **filters**, the selection of **columns** or the **resolution of the Gantt chart**, **different settings** can be made for the **printout** within each profile:



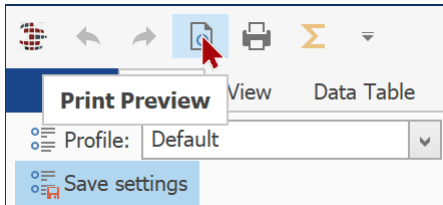
If different print settings are available, this is indicated by a **(Yes)** next to the button. If there are no special settings, the unchanged settings of the respective profile are also used for the printout.

The print profile can be deleted independently of the actual profile:

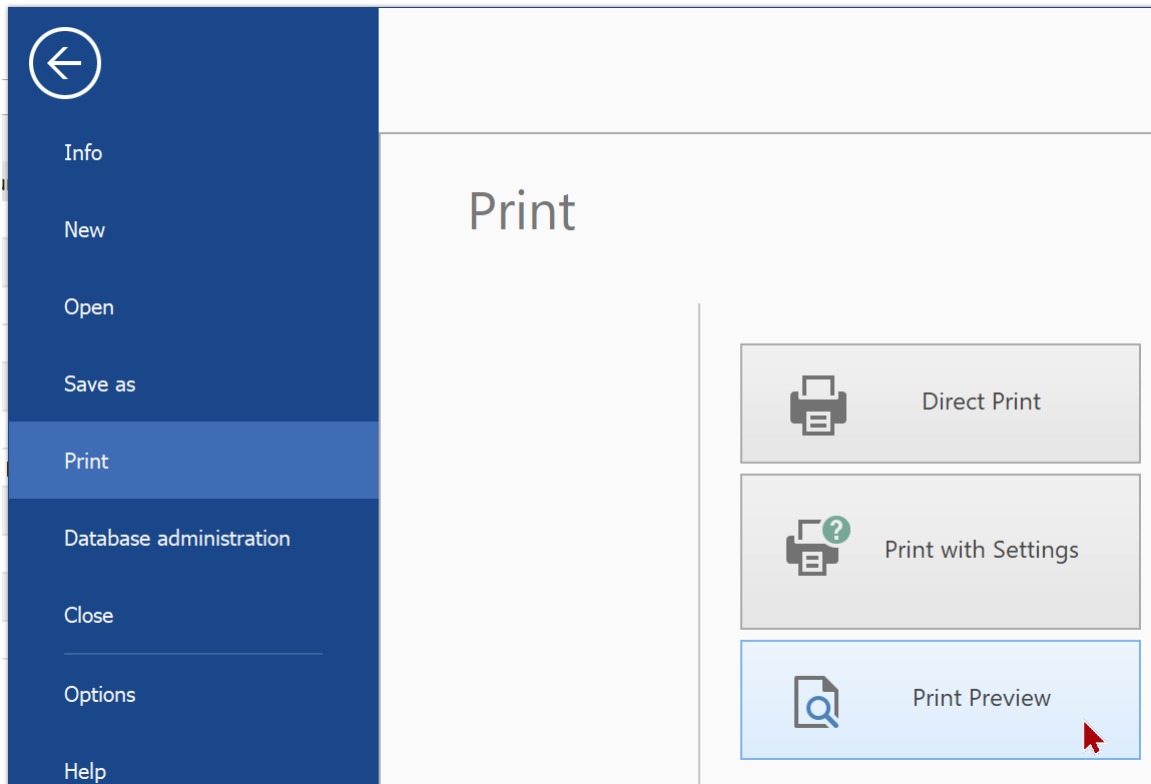


Special print settings

All settings that are **only useful for printing are** made in the **print preview**, ...

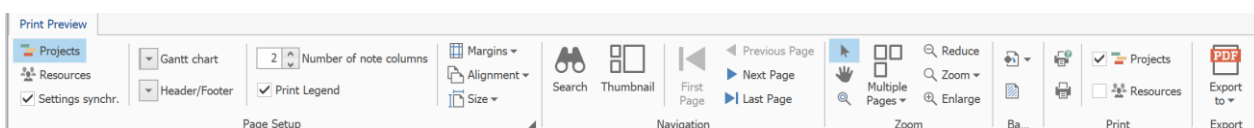


... which can be accessed either via the Quick access bar or via the file menu ...

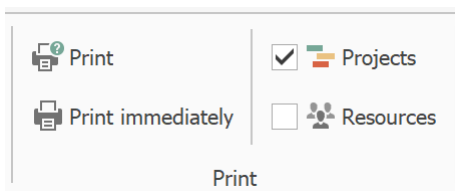


... can be called.

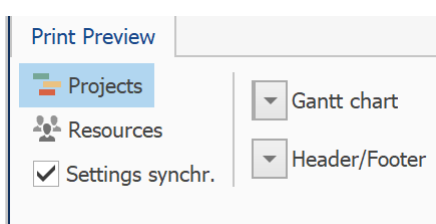
The print preview and the print output can be adapted to the respective need by a large number of options:



Project or resource output



The output of the project view (upper part of the screen view) and the resource view (lower part of the screen view) are independent of each other.

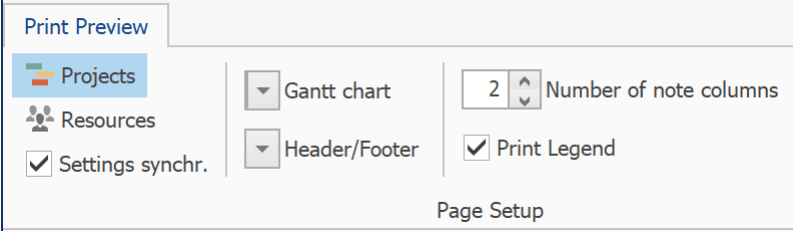


If the same settings are to be used here, both printouts can be synchronized so that the settings only have to be made once.

Print notes

If printing of notes is enabled, they will be printed on a **separate page** at the end.

To make the best use of the space under the table, the **number of note columns** can be freely selected:



The 'Print Preview' dialog box shows the 'Page Setup' tab. On the left, there are three sections: 'Projects' (with a bar chart icon), 'Resources' (with a person icon), and 'Settings synchr.' (with a checked checkbox). In the center, there are two dropdown menus: 'Gantt chart' and 'Header/Footer'. On the right, there is a 'Number of note columns' spinner set to '2' and a 'Print Legend' checkbox which is checked. The title bar of the dialog is 'Print Preview'.








If the number of note columns is 0, no notes will be printed.

The **assignment between row and note** is made on the basis of the column number (**No.**). So that it is recognizable with which rows notes are present, the numbers of these rows are provided with an asterisk (*).

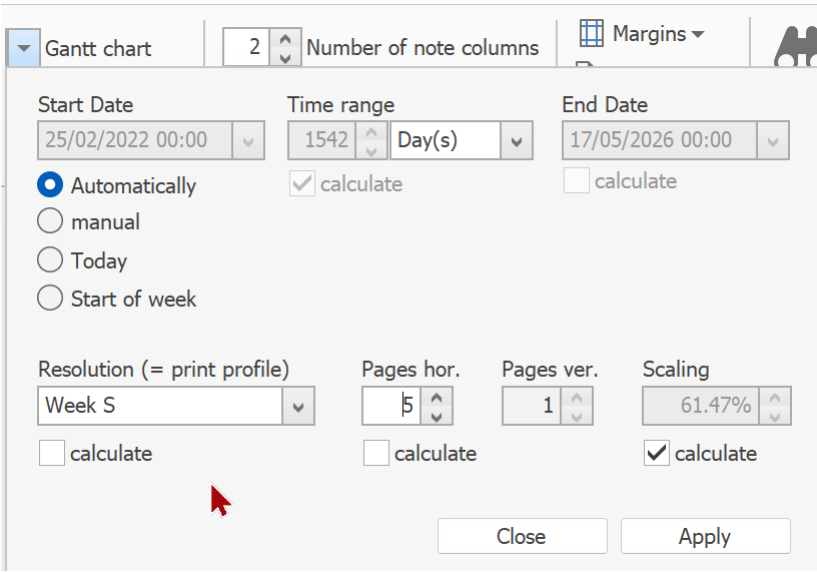
Notes of time bars are marked by the number of the row and a running number, e.g. 15-1 = first bar note of the 15th row. Here, only notes of time bars are printed that are visible in the Gantt chart when printed.

Print legend

A legend can optionally be printed before the notes. Here, all bar patterns used during printing are displayed with their designations (see Individual pattern on page 122) are printed:

Legend			
	data proc.		internal implem.
	external implem.		milestone
			Priority 02
			process
			topics

Gantt chart



The 'Gantt chart' settings dialog box has a title bar with 'Gantt chart', 'Number of note columns' (set to 2), 'Margins', and a printer icon. The main area contains several sections: 'Start Date' (25/02/2022 00:00), 'Time range' (1542 Day(s)), and 'End Date' (17/05/2026 00:00). Below these are radio buttons for 'Automatically' (selected), 'manual', 'Today', and 'Start of week'. There are also checkboxes for 'calculate' under each date field. The bottom section has 'Resolution (= print profile)' set to 'Week S', 'Pages hor.' set to 5, 'Pages ver.' set to 1, and 'Scaling' set to 61.47%. Each of these has a 'calculate' checkbox. At the bottom are 'Close' and 'Apply' buttons. A red mouse cursor is pointing at the 'calculate' checkbox under 'Resolution'.

The following options are available for entering the start of printing:

Automatically: The time span for the print area is selected so that all time bars are visible. However, depending on the time span of your planning, this may result in a very large printout!

Manual: In this case, enter the desired value in the **Start date** field.

Today: When this option is selected, the current day is determined and used as the **Start date** for each print task.

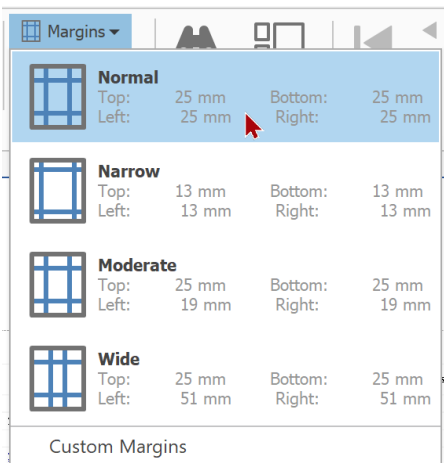
Start of week: In this case, the Monday of the current week is used as the **Start date** for each print.

The **End date** can be entered in the form of the **Time range** or as a fixed date, depending on the requirement. The other value is then calculated.

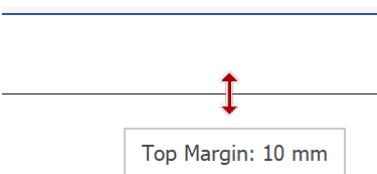
The width of the Gantt chart or the number of pages displayed is also largely determined by the resolution, which corresponds to the resolutions of the screen display.

In addition, the scaling with which the printout is to be made can be specified.

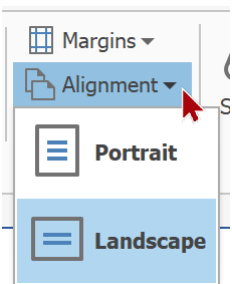
Size, margins



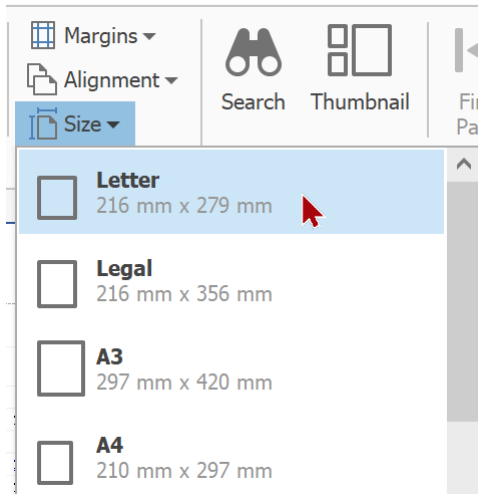
The page margins can be either selected from 4 predefined sizes or set as desired by selecting Custom Margins.



In addition, the margins can be set by dragging and dropping directly in the preview, but the settings also apply equally to all pages.



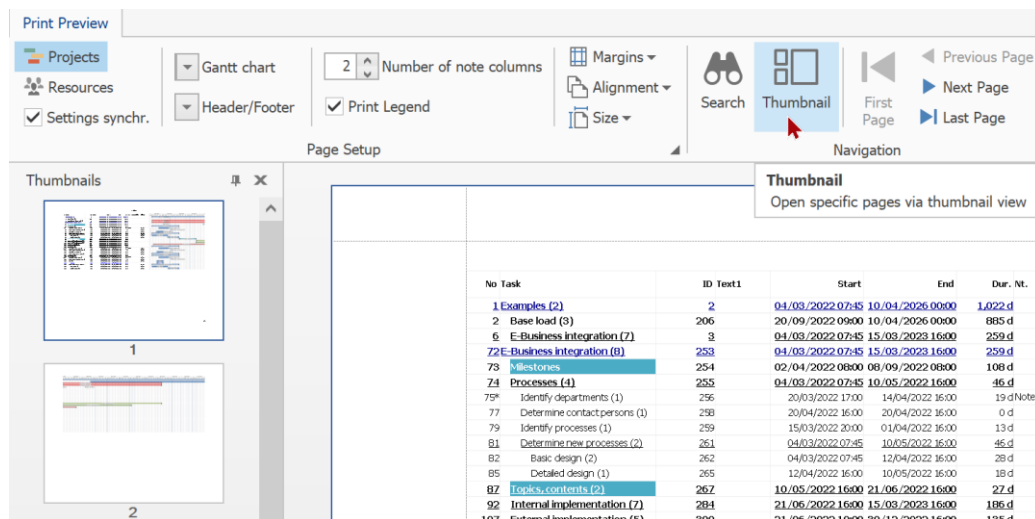
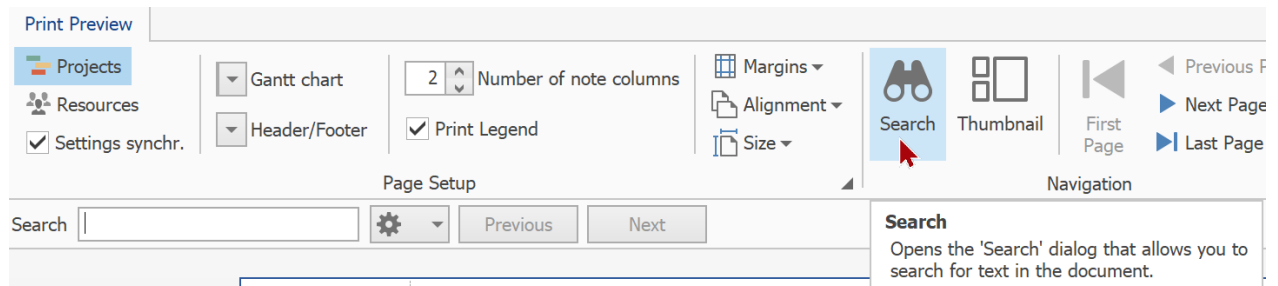
The same block also contains the setting for portrait and landscape format.



All formats offered by the set printer are available as sheet sizes.

Search, print preview display

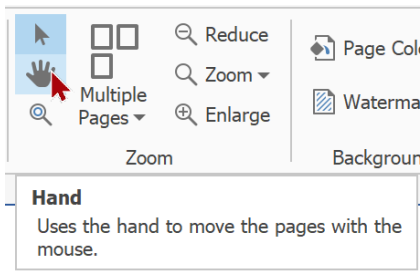
If a specific part of the expression is to be checked, the **Search** can be used for this purpose:



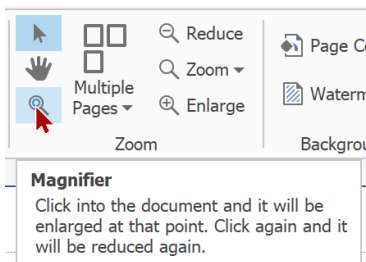
The **Thumbnail** view on the left side allows to quickly access specific pages of the printout.



In addition, the print pages can be browsed using the navigation buttons.

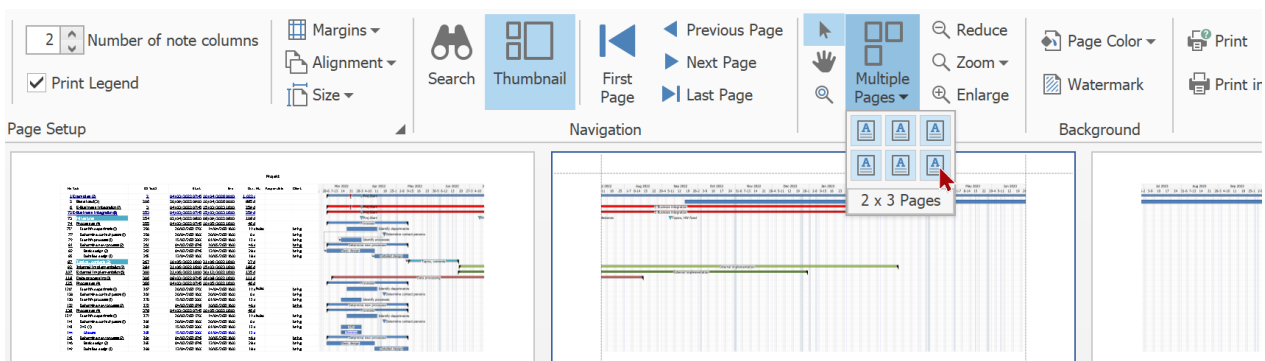


In the case of an enlarged view of the printed pages, the **Hand** allows moving the pages, with the help of which the part to be checked can be dragged into the visible area.

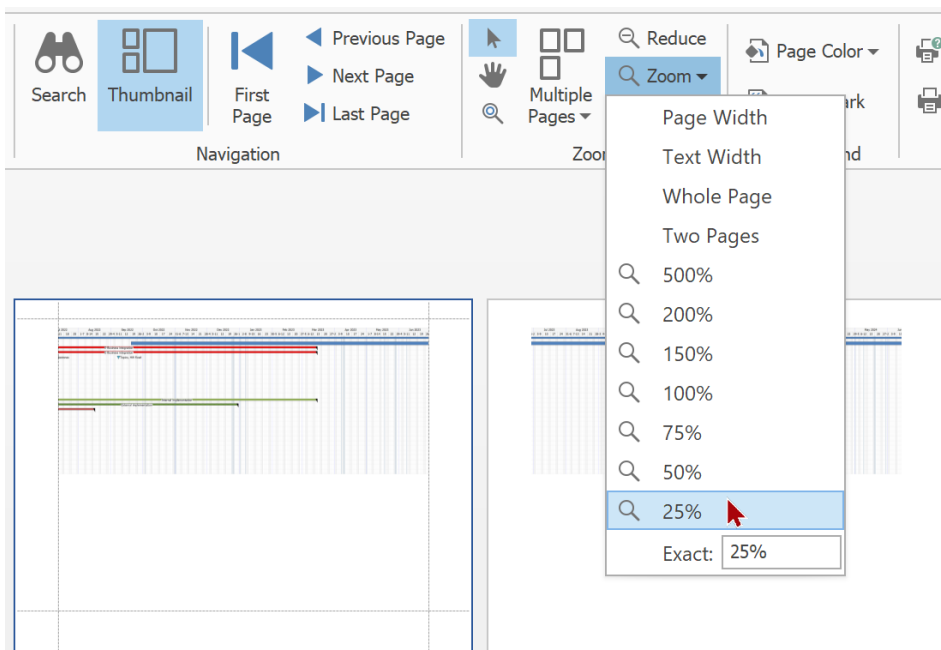


The icon below the **Hand** switches the print pages between the current enlargement or reduction to full screen mode or vice versa.

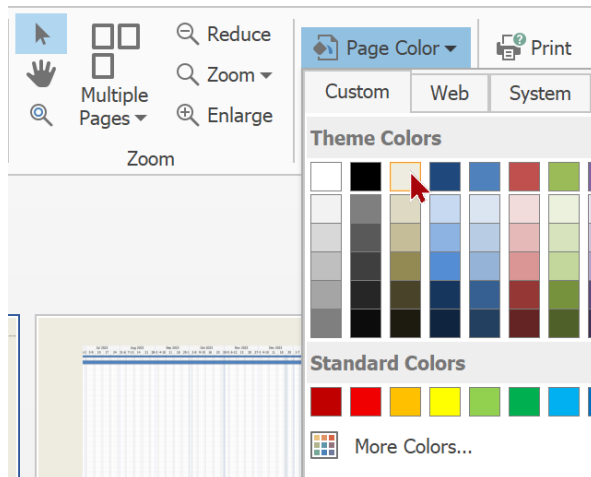
If a larger number of pages is to be displayed at the same time, the number of pages can be "stretched" horizontally and vertically with the mouse after clicking the corresponding button:



Likewise, the size of the pages in the print preview can be changed using the zoom buttons or set as a numerical value after clicking **Zoom**:

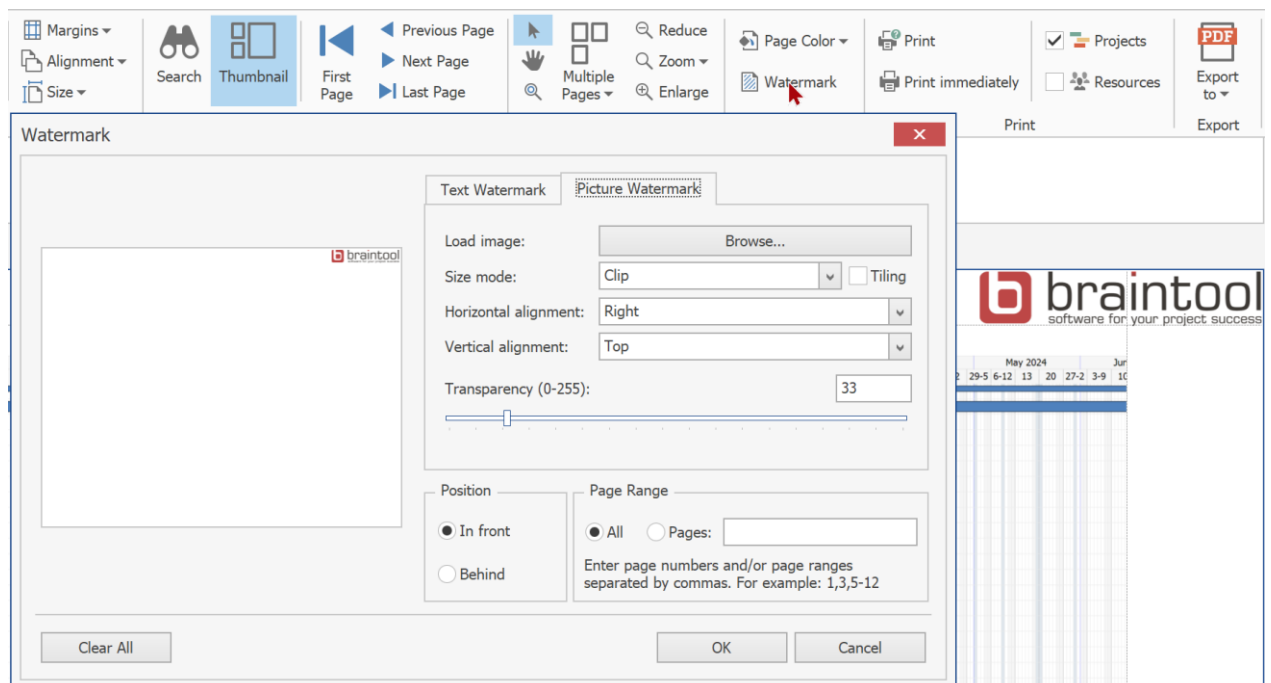


Page color, watermark



The color of the non-printed area, i.e. the margins, can be set as desired.

Before or after the printout, any or all printed pages can be watermarked, which can consist of text or a graphic, such as a logo:



Hint:

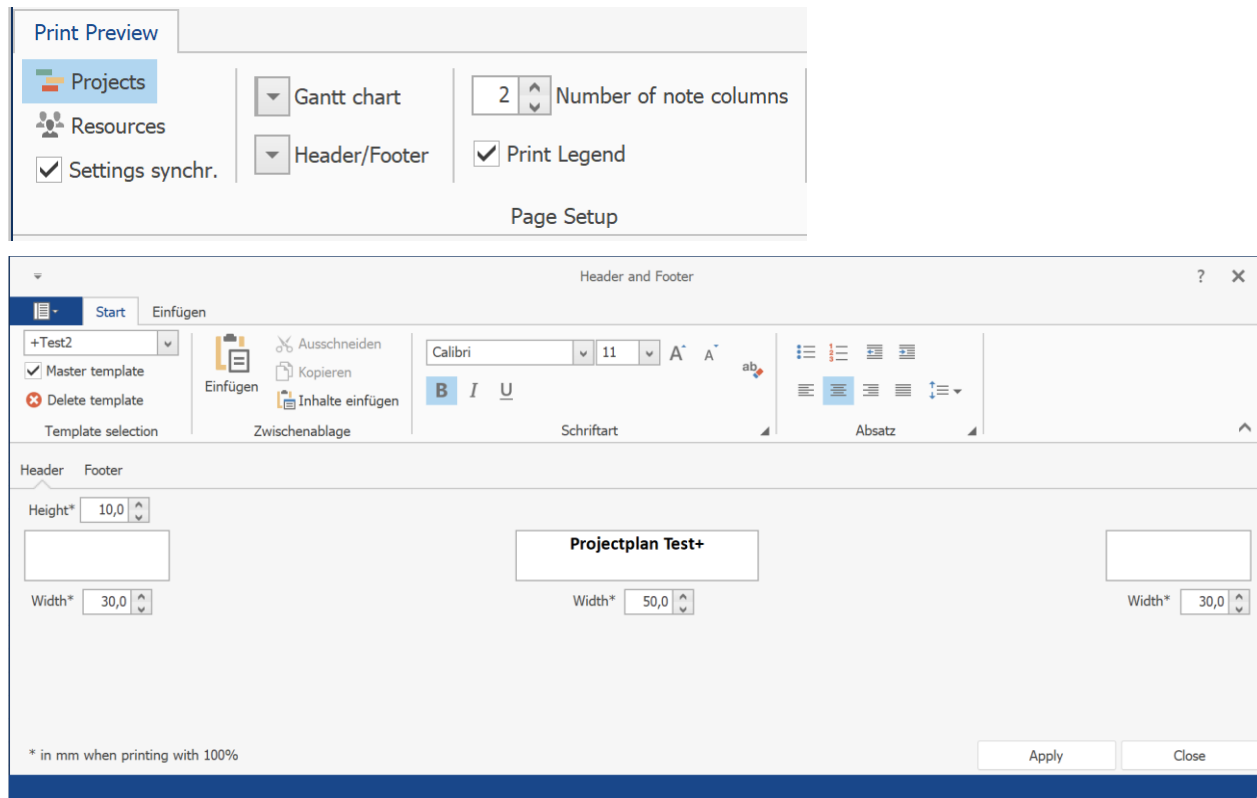
Currently, it is not yet possible to save the logo so that it is automatically available the next time you print. However, this will also be possible in a later release of A-Plan X. However, you can also include a graphic within the header or footer (see next section).

Header and footer

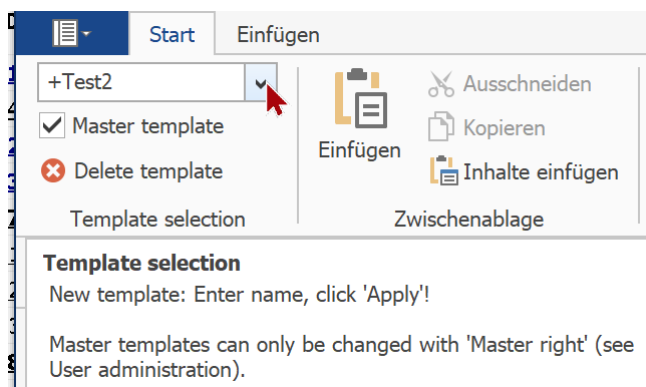
For the design of headers and footers, a special editor is available, which can be operated in the same way as e.g. MS Word, but in this case, of course, with significantly less functionality.

Both the header and footer are divided into **three sections** each, which can be designed separately.

The editor for the headers and footers is called in the **print preview**:



Templates



To avoid having to create a special header and footer for each print profile, you can create as many **templates** as you like and assign them to the profiles used by selecting them from the list.

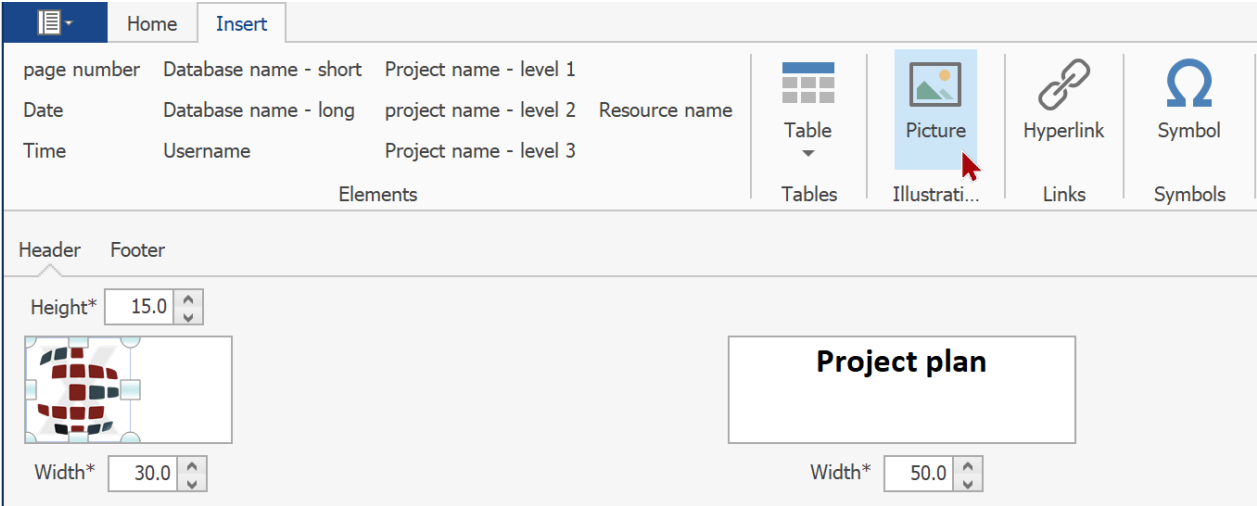
Analogous to the profiles, **master templates** can also be created, which are available to all users and can be created and changed with master rights for A-Plan. Like the profiles, these are also given a leading '+' to distinguish them from personal templates.

Functions

A detailed explanation of the individual functions is omitted here, since they are self-explanatory or can be found in the same way in MS Word.

In the **Insert** tab, placeholders are available under **Elements**, which are replaced by the respective values during printing.

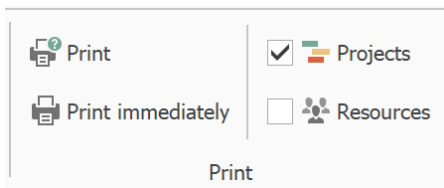
Here, for example, in the footer the **database name was** inserted in **short form in the** middle and the **page number on the** right:



The placeholders **Project name - level 1** to **Project name - level 3** and **Resource name** are used to print the project or resource located on the respective page in the header or footer.

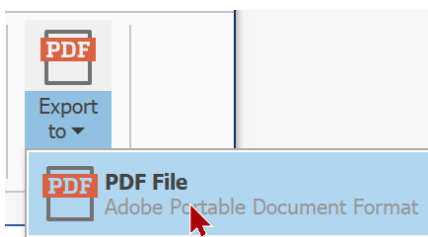
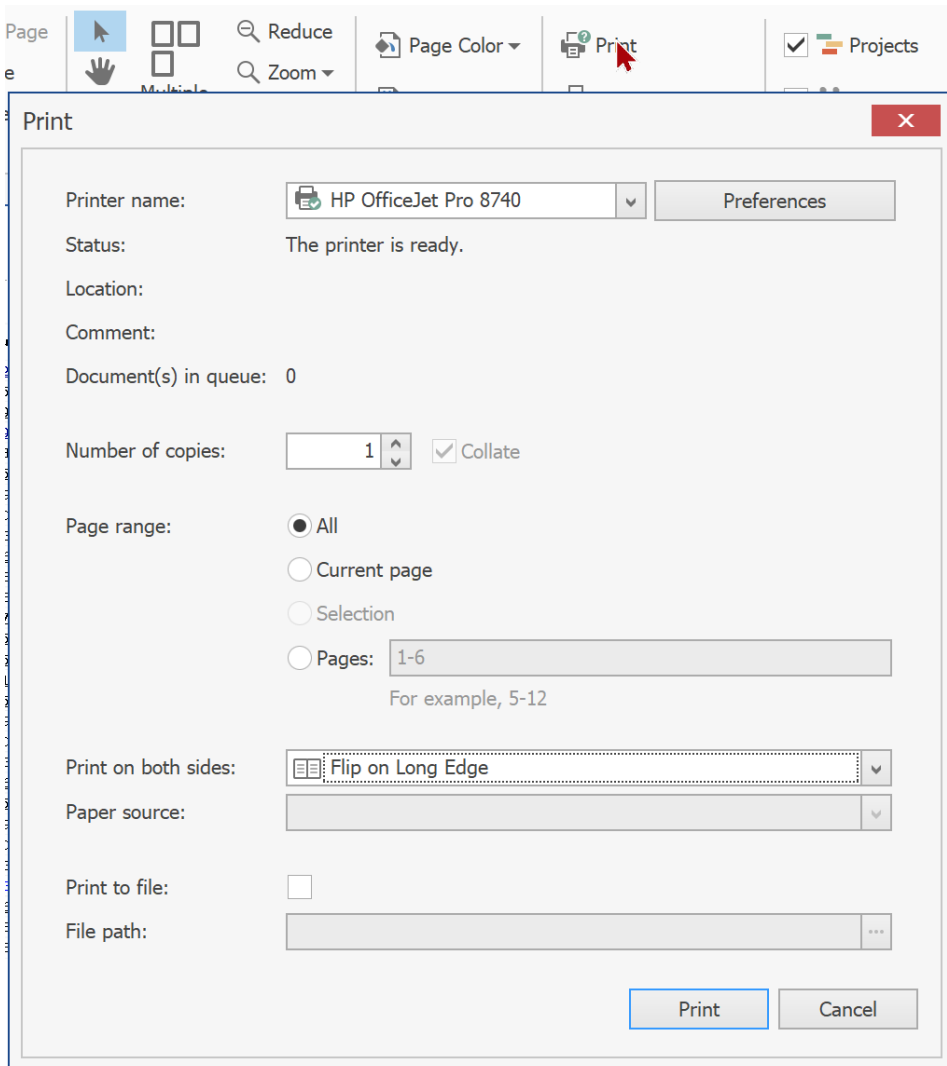
If the respective block or resource - when printing the resource view - extends over several pages, the designation is repeated on each of these pages.

Print, output as pdf file



The **Print** block allows you to start printing with previous settings of the printer and its properties or to **Print immediately** with the last used settings.

Printer dialog window after clicking **Print**:



Printing can also be done to a **PDF file** ...

PDF Export Options ✕

Page range:

Don't embed these fonts:

☐ Export editing fields to AcroForms

☒ Convert images to JPEG

Image quality: ▾

PDF/A compatibility: ▾

Password security: ...

Digital signature: ...

Application:

Author:

Keywords:

Subject:

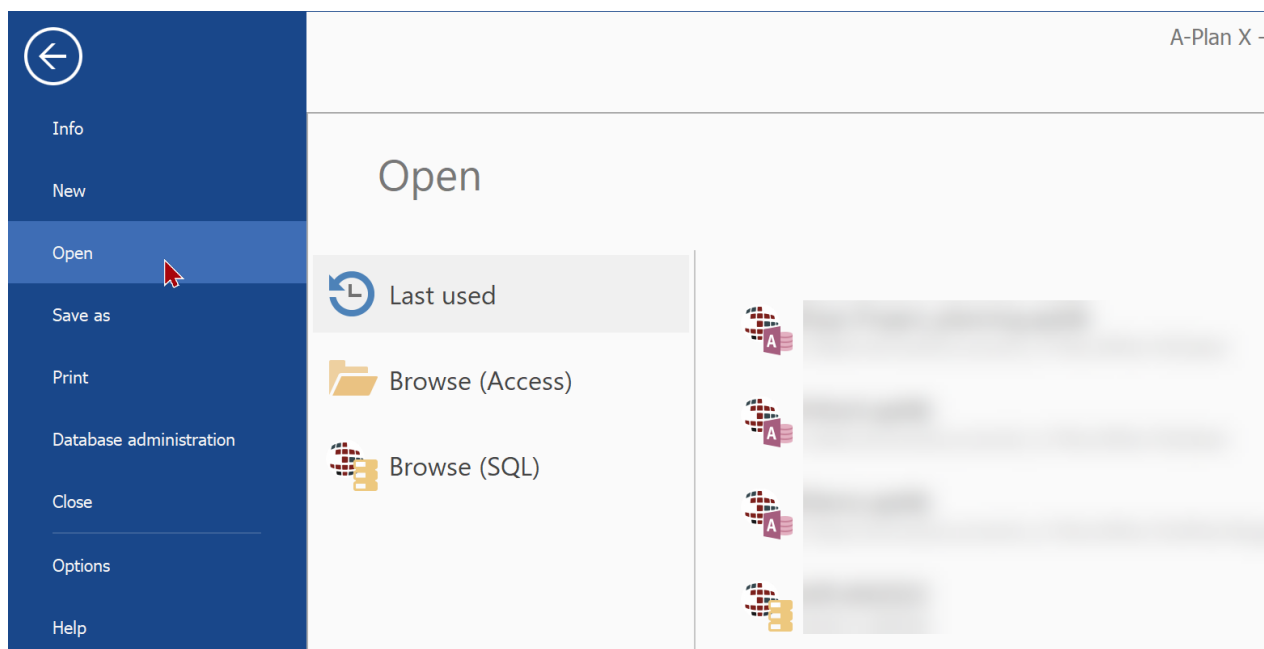
Title:

... with a larger number of presets available.

FILE FUNCTIONS

OPEN

Opening a database is done after clicking **Open** in the **File** tab:



Note:

While it is not possible to open two different databases at the same time within A-Plan, you can open A-Plan a second time and then load the desired other database.

SAVE AS

By selecting **Save as** in the **File** tab - after entering the desired file name - all data will be saved in a new database. The current database remains in place.

In A-Plan, all entries and changes are saved immediately, so there is no menu item **Save** and when you **Close** the program there is no prompt asking whether you want to save the entered data. Also an intermediate storage is not necessary!

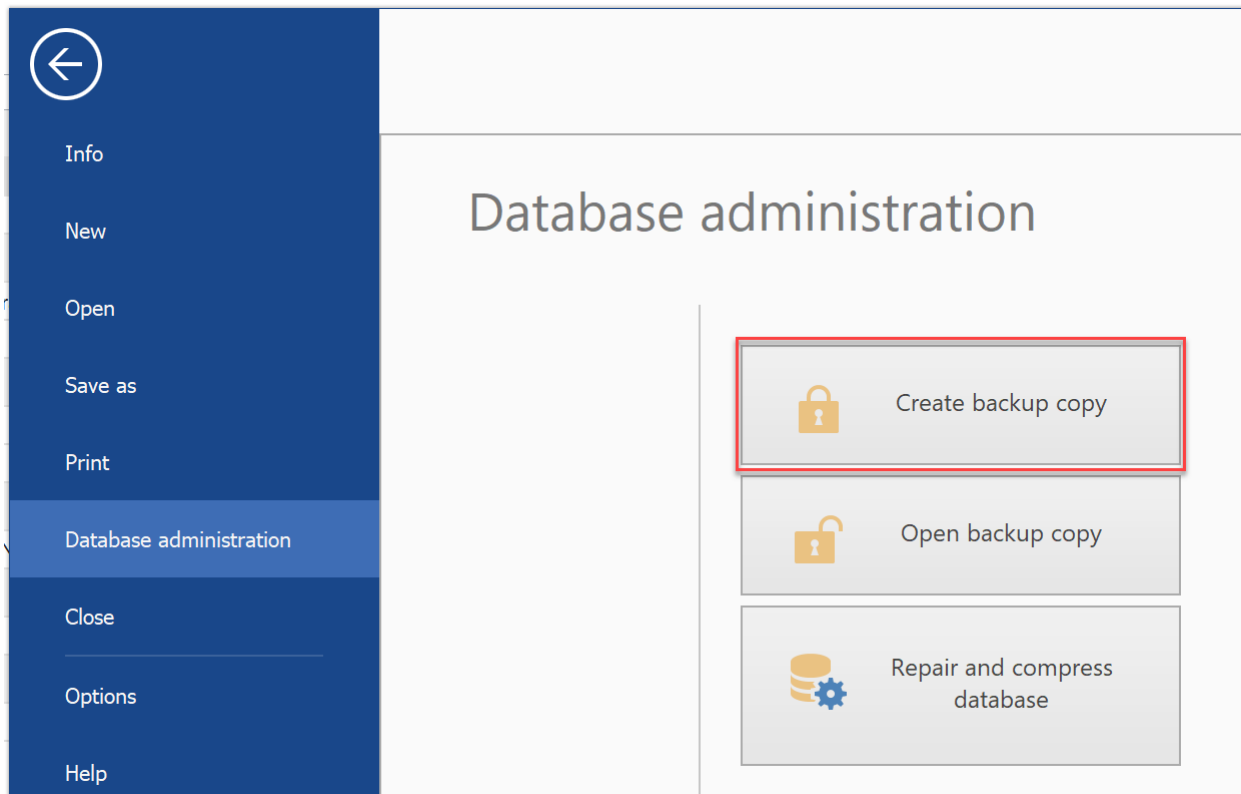
File extension

Although A-Plan works with files in "Microsoft Access" format, the file extension ***.apldb** is used, otherwise A-Plan could not be opened by double-clicking on an A-Plan file.

DATABASE ADMINISTRATION

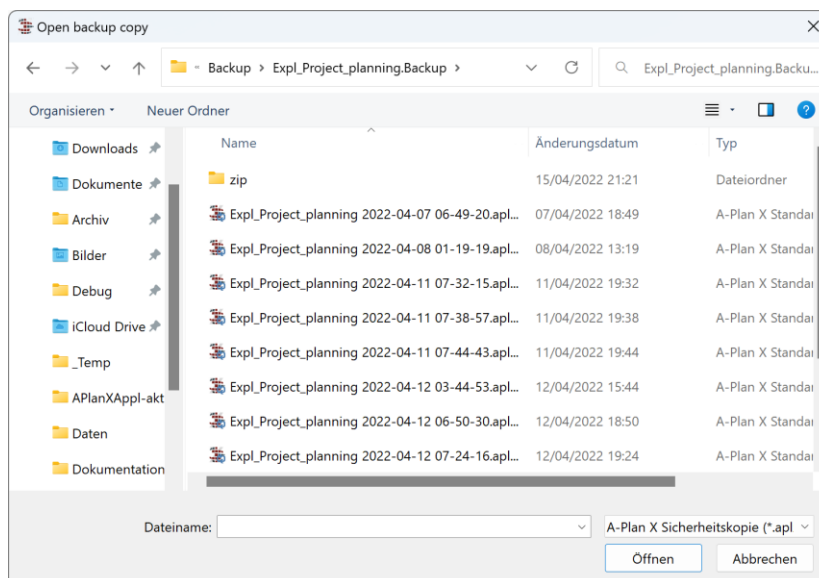
Create backup copy

In addition to the automatic creation of backup copies (see "Master database, security" on page 127), a backup copy of the current database can also be created at any time, e.g. before making major changes. The **Create backup copy** function is used for this purpose:



Open backup copy

After clicking **Open backup copy**, select the state you want to restore from the file dialog window:



The file is then first opened under the name with the date and time appended. You can then save it with the original name by clicking **Save As**.

Repair and compress database (standard version only)

MS Access databases used with the standard version of A-Plan may, in very rare cases, fail to open due to a data error. In this case, when you try to open it, you will be offered to repair the database.

Since an Access database grows in size over time with many changes, this routine can also be called manually under **Database Administration** to occasionally free the freed space and thereby reduce the size of the database.

USER ADMINISTRATION

GENERAL NOTES FOR MULTI-USER VERSION

With the multi-user version of A-Plan, several users can access a database **simultaneously** (see "Organization of data (database) " on page 37), and changes are available to all users of the database within a maximum of 30 seconds. This means that the display will be updated for all other users within this time (see also Performance on page 74).

Users with their rights are stored **in the database**. If necessary, multiple databases can be created, and different users and permissions can be entered for each database. Nevertheless, no more users can work with A-Plan than there are licenses. So, for a 5 user license, it is not possible to have 5 users in one database and 5 other users in another, but they would have to be the same as in the first database.

Permissions for data and functions within a database can be assigned individually for each user.

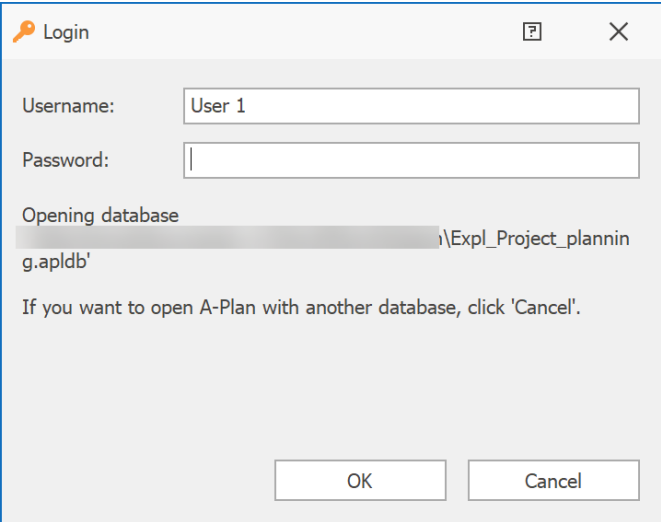
Important:

A prerequisite for network use is that A-Plan was purchased as a **multi-user license** and that the number of licenses corresponds to the number of **all users** of A-Plan. This means that the licenses are "Named Users" and not "Floating Licenses".

USERS

Create users

Note: For **SQL databases**, there are some differences with regard to users compared to the user management described in this chapter for MS Access databases. They are described in the section **SQL Version** (see "Create new SQL database" on page 183).



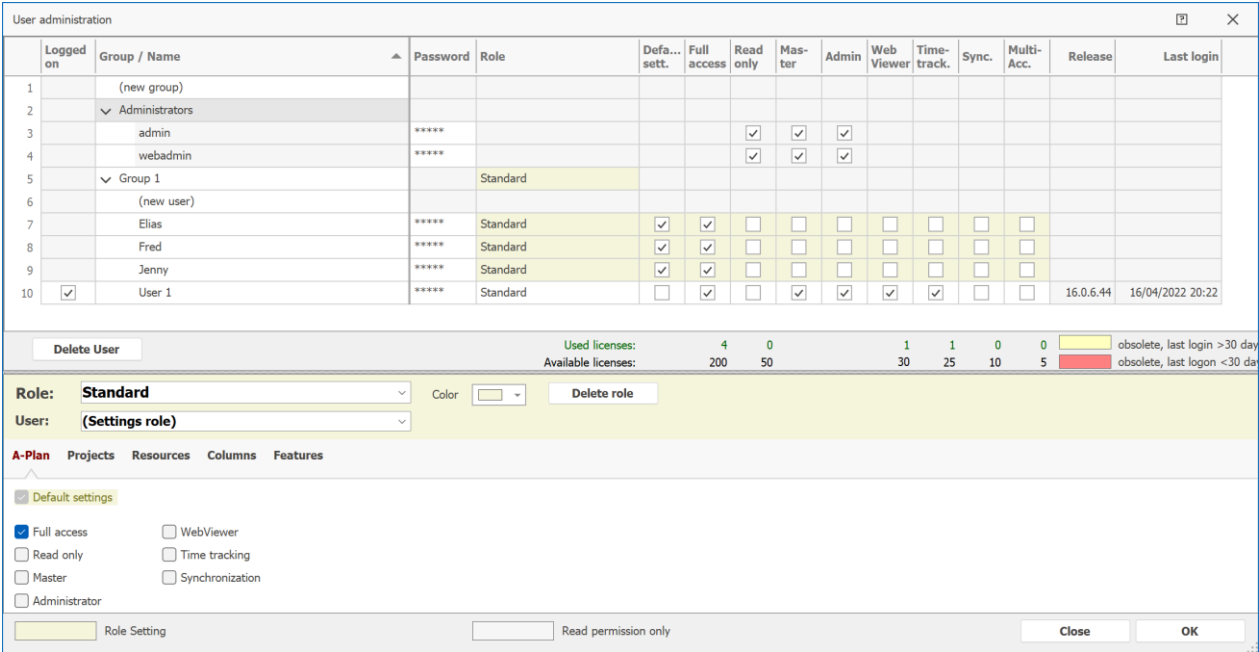
A login dialog box titled "Login" with a question mark icon and a close button. It contains two input fields: "Username:" with the text "User 1" and "Password:" which is empty. Below these fields, it says "Opening database" followed by a path: "I:\Expl_Project_plannin g.apldb'". A message below that says "If you want to open A-Plan with another database, click 'Cancel'." At the bottom are "OK" and "Cancel" buttons.

When a new database is opened for the first time, the name of the user is always "User 1".

You should therefore enter a password in the **Tools** menu after opening (**Password** button) to prevent unauthorized opening of the database.

By default, the user "User 1" is set to administrator privileges so that he/she can create additional users or delete existing users. Only registered users have access to this database.

To create and modify users, select the **Users** command in the **Tools** tab:



The "User administration" window shows a table of users and roles. The table has columns for Logged on, Group / Name, Password, Role, Defa..., Full access, Read only, Master, Admin, Web Viewer, Time-track, Sync, Multi-Acc, Release, and Last login. The table lists several groups and users, including "admin", "webadmin", "Group 1", "Elias", "Fred", "Jenny", and "User 1". Below the table, there are sections for "Delete User", "Used licenses", "Available licenses", "Role: Standard", "User: (Settings role)", and "Default settings". The "Default settings" section includes checkboxes for "Full access", "Read only", "Master", "Administrator", "WebViewer", "Time tracking", and "Synchronization". At the bottom, there are "Role Setting" and "Read permission only" fields, and "Close" and "OK" buttons.

	Logged on	Group / Name	▲	Password	Role	Defa...	Full access	Read only	Master	Admin	Web Viewer	Time-track	Sync	Multi-Acc	Release	Last login
1		(new group)														
2		▼ Administrators														
3		admin		*****				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
4		webadmin		*****				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
5		▼ Group 1			Standard											
6		(new user)														
7		Elias		*****	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
8		Fred		*****	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
9		Jenny		*****	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
10	<input checked="" type="checkbox"/>	User 1		*****	Standard	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16.0.6.44	16/04/2022 20:22

Used licenses: 4 0 1 1 0 0 obsolete, last login >30 day

Available licenses: 200 50 30 25 10 5 obsolete, last login <30 day

Role: Standard Color: Delete role

User: (Settings role)

A-Plan Projects Resources Columns Features

☒ Default settings

☒ Full access ☐ WebViewer

☐ Read only ☐ Time tracking

☐ Master ☐ Synchronization

☐ Administrator

Role Setting Read permission only Close OK

Group / Name, Password

The users are organized in groups, first of all there is the invariable group **Administrators** and the group **Group 1**.

A new user is created by overwriting the name (**new user**) and is enabled in the **Full access** column to use the current database with A-Plan.

A new group is created by overwriting the name (**new group**). Groups have the advantage that a role can be defined for the entire group (see "Role concept" on page 149), which then applies to all members of this group.

Users can be moved to other groups via drag & drop.

The number of registered users cannot exceed the number of purchased licenses, not counting admin and webadmin users (see below).

A username can be deleted (**Delete User** button) only if the user is not logged in.

A **password** can also be entered, but the user can change it at any time (**Tools / Password** tab). If no password has been entered, the user in question can open the database **without a password**, so he/she should set a password as soon as possible.

Registered

The **logged on** column shows who is currently logged in to the database. If the login status of a user has not been reset to "no" in case of a system crash, he/she can be reset by clicking "yes".

Role, Default setting

In order to avoid entering the permissions for each user individually, the permissions can be defined as roles and thus assigned to several users. A detailed explanation of this can be found under "Role concept" on page 149.

Full access

Users with full access can use the following functions within the scope of the set permissions (see "Permissions" on page 149) can use A-Plan.

Master, Admin

For all users it is possible to set whether they should also have **master** or **administrator rights**.

Master rights is required for the following functions:

Setting user permissions

Create or delete users

Reset passwords

Changing database settings (see "Basic settings" on page 119)

Entering license data that subsequently applies to all other users

Setting and deleting master locks (see "Lock rows" on page 41)
optional) With **administrator rights**, all the above settings of the master user can be made and additionally:
Creating databases on the SQL server
Overwriting an original database with a backup copy
A user with administrator rights therefore automatically always has master rights as well.

Read only

Any user can be set to **read only**, so that these users cannot modify any data regardless of other settings.

Note:

Users with **master** or **administrator rights** can also be set to **read only**. They could re-set this restriction themselves, but this can prevent the users in question from accidentally changing something, although they are actually only supposed to perform higher-level tasks.

WebViewer

Users who are to be informed about the current status with the help of the WebViewer are activated in this column.

*Time tracking, Synchronization**

Here you can define the users who are allowed to use the time tracking or synchronization for A-Plan.

* Not yet included in the current version of A-Plan X.

Release

The **release** column shows which release of A-Plan the respective user is currently working with (see "Info about A-Plan (license data, release number)" on page 13).

User "admin" and "webadmin".

In addition to the "normal" users, there are also the non-deletable users **admin** and **webadmin** in every A-Plan database. The **admin** user can only be used for **pure administrator tasks**, such as creating users, assigning user rights and setting database options. It cannot view or change any data and is not counted in the licenses used because of this limitation.

The **webadmin** user is required for A-Plan's **WebViewer**.

PERMISSIONS

Role concept

Since A-Plan allows a large number of different permissions to be assigned to users, the basic settings for this are made in roles that are assigned to the users. This means that it is not necessary to assign individual permissions to each user. In addition, it is possible to provide deviations from the set roles for each individual user.

The authorizations are

- A-Plan permissions (e.g. "full access", "read only", "master" etc.)
- Project permissions
- Resource permissions
- Column permissions and
- Function permissions

Working with roles

Creating roles and A-Plan permissions

New roles are created by entering a new name in the list of roles and confirming with Enter:

	Logged on	Group / Name	▲	Password	Role	Defa... sett.
1		(new group)				
2		▼ Administrators				
3		admin		*****		
4		webadmin		*****		
5		▼ Group 1			Standard	
6		(new user)				
7		Elias		*****	Standard	<input checked="" type="checkbox"/>
8		Fred		*****	Standard	<input checked="" type="checkbox"/>
9		Jenny		*****	Management	<input checked="" type="checkbox"/>
10	<input checked="" type="checkbox"/>	User 1		*****	Standard	<input type="checkbox"/>

Delete User

Used licenses:
Available licenses:

Role: Management

Color

Delete role

User: (Settings role)

A-Plan

Projects

Resources

Columns

Features

☒ Default settings

To make it easier to recognize the assigned roles in the list of users, the roles can be assigned different colors.

In the **A-Plan** tab, basic permissions for the role are set, such as "full access", "read only", "master" and whether licensed addons, such as the "WebView" etc., may be used.

Hint:

Changed permissions will only become active when the user concerned reopens A-Plan.

Project permissions

Role: Management

User: (Settings role)

Color

Delete role

A-Plan
 Projects
 Resources
 Columns
 Features

	Project / Task ▲	Parent setting	Create	Chan...	Read	none	Planni... reado...	Limits reado...	Costs reado...	Costs w/o	Alarm w/o
1	▼ (default setting)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	▼ E-Business integration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Data processing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	External implemen...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Internal implemen...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Milestones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Processes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Project / task (column 1)




In the first column, all folders are displayed with their **projects and tasks**. For reasons of clarity, the **maximum depth of the levels** can be limited (on the right in the title bar).

The top row "(default setting)" contains the default permissions for all folders for which no special permission should apply.

Parent setting (column 2)

If the settings of the next higher level are to be used for an activity, a project or a folder, this is activated by a check mark in the column **Parent settings**.

Authorizations (columns 3 - 6)

Authorization	Create / delete data ¹	Change data	Read data ²	Symbol ³
Create	yes	yes	yes	
Change	no	yes	yes	
Read	no	no	yes	
None	no	no	no	-

- ¹ Create and delete projects, tasks and time bars
- ² Folders/projects/tasks that do not have read permission are not visible to the affected user(s) in the main window, and an empty tab is displayed in the properties window.
- ³ When displayed in the main window respective label is shown in the status column (see "Traffic light, Status and Deadline" on page 27).

Planning read only (column 7)

Changing planning data is prevented. This means that a user can see the planning data of the folder/project/activity in question, but can only enter or change actual data.

Limits read only (column 8)

Changing limits (see "Limits" on page 63) is prevented.

Costs read only (column 9)

Changing cost data is prevented. This means that a user can see the cost data of the folder/project/activity in question, but cannot enter or change any data.

Cost w/o (column 10)

All fields that contain costs will be excluded from displaying or printing.

Alarm w/o (column 11)*

No alarm is triggered that was set in the affected area.

* Not yet included in the current version of A-Plan X.

Hint:

If there is **no authorization** for a folder or a project (level 1 or 2), the associated data will not be read in from the database and therefore will **not be taken into account, for example, in the workload of resources!**

Resource permissions

A-Plan Projects Resources Columns Features																		
				Resources				Absences			Calendar			Costs				
	Group / Resource	▲	Parent setting	Neu-tral	No wor...	Cre...	Chg.	Read	none	Chg.	Read	none	Chg.	Read	none	Chg.	Read	none
1	▼ (default setting)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	▼ Company XYZ		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Internal staff		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Production		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	➤ External		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In principle, the same applies to the resource authorizations as to the project authorizations, therefore only the deviating points are described here.

The authorizations for **Absences**, **Calendar** (overtime and special times) and **Costs** can be defined separately.

Neutral (column 3)

Normally, tasks for which no rights exist are also not displayed in the resource display - in the lower part of A-Plan. However, this has the disadvantage that the workload of the resources can be seen, but not how they come about.

If the **Neutral** option is enabled, the tasks without authorization will be displayed with their time bars, but with neutralized name ('hidden in project view'):

Resource/Task	Traffic light	Status	Dec 2022							Jan 2023		
			4	21	28-4	5-11	12	19	26-1	2-8	9-15	16
<div><div></div>Company XYZ (2)</div>												
<div><div></div>Internal staff (3)</div>												
<div><div></div>Stevens (20)</div>												
Absences												
Base load	<div></div>											
Staff training	<div></div>											
(hidden in project view)	<div></div>											

No workload (column 4)

If you do not want to display any workload of resources, you can specify this in the **No workload** column.

Required permission for assigning resources in the project view

Resources can only be assigned by users who have at least the **Change** permission for the resource or resource group in question.

Hint:

If there is **no authorization** for certain resources, they will not be **displayed** as an **assignment in projects nor in the selection list for the assignment of resources!**

Column permissions

For each individual column it can be defined separately whether values may be entered or changed by assigning a role to a user or a group within the column, whether the values of the column may only be read or whether the column should not be displayed:

A-Plan Projects Resources Columns Features					
	Column (Original designation) ▲	Chan...	Read	none	
10	Calc. mode costs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
11	Client (List 1)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
12	Compl at (Completed on)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
13	Completed %	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
14	CstRate act (Cost rate act.)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
15	CstRate pld (Cost rate pld.)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
16	Deadline		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
17	Default cal. (resources / Def...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Function permissions

It is also possible to specify for individual functions whether they should be deactivated for the owners of a role by setting a check mark:

A-Plan Projects Resources Columns Functions

Disabled Functions

<input type="checkbox"/> Resource planning	<input type="checkbox"/> Change working hours	<input type="checkbox"/> Create database
<input type="checkbox"/> Planned/Actual Mode	<input type="checkbox"/> Show working time	<input type="checkbox"/> Export / Import
<input type="checkbox"/> Cost planning	<input type="checkbox"/> Change own absences	<input type="checkbox"/> Print
<input type="checkbox"/> Quantity planning	<input checked="" type="checkbox"/> Change completion status*	<input type="checkbox"/> Information about Patch
<input type="checkbox"/> Adjustment Function	<input type="checkbox"/> Change settings	<input type="checkbox"/> Backup creation

Change List Elements:

Fixed profile:

* Only affects users without write permission. The tick must be explicitly removed so that they can at least change completion statuses.

This concerns the following functions

Resource planning (see "Resource planning" on page 82)

Target/actual mode

Cost planning (see "Fixed costs, cost rate of resources" on page 97)

*Quantity planning**

Adjustment function (see "Automatic adjustments" on page 93)

Change or display working times (see "Working hours" on page 87)

Change own absences

If read-only permission is available for the resource group to which the user belongs, the user is normally still allowed to enter or change his/her own absences. If this should not be possible, this function can be deactivated here.

Change completion status

Users who only have read permission cannot make any changes, but optionally with one exception: If there is no checkmark in the Disabled functions **Change completion status**, they can mark tasks as completed or not completed. By default, the checkmark is set, so users without write permission must be given this option explicitly by removing the checkmark.

Change settings

If this function is deactivated, the user can change the options (see "Change settings" on page 104) of A-Plan and thus cannot change any of the settings available there. Ideally, this setting should be used together with the **Unchangeable profile**.

Unchangeable profile

Allows you to create a global profile for specific users (see "Saving the settings in profiles" on page 128) can be permanently set for certain users. This is especially recommended for inexperienced users, as they will then not accidentally change settings and will not be able to restore the original settings without help.

Create database (see "
File functions " on page 142)

Export / Import (see "Special functions" on page 159)

Print (see "Print " on page 130)

Note on patch (see "Updating the installation (patches)" on page 13)

If certain users should not receive information about new releases of A-Plan (patches), this can be deactivated here.

Creating backup copies (see Create backup copy on page 143)

Change the selection option for certain list fields (see List fields on page 43)

* Not yet included in the current version of A-Plan X.

Special permissions

For all permissions, settings can be made for individual users that differ from the respective role.

For example, the user "Elias" is additionally assigned the master and administrator authorization here:

	Logged on	Group / Name	Password	Role	Defa... sett.	Full access	Read only	Mas- ter	Admin
1		(new group)							
2		▼ Administrators							
3		admin	*****				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4		webadmin	*****				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5		▼ Group 1		Standard					
6		(new user)							
7		Elias	*****	Standard	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8		Fred	*****	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	<input checked="" type="checkbox"/>	Jenny	*****	Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	<input checked="" type="checkbox"/>	User 1	*****	Standard	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Delete User

Used licenses: 4 0
Available licenses: 200 50

Role: Standard
Color:
Delete role

User: Elias

A-Plan Projects Resources Columns Functions

☐ Default settings

☒ Full access
☐ WebViewer

☐ Read only
☐ Time tracking

☒ Master
☐ Synchronization

☒ Administrator

Role Setting
Special User Setting
Read permission only

Since the A-Plan setting thus no longer corresponds to the selected role in all respects, the relevant row in the user list is highlighted in white, as are the relevant A-Plan settings.

The same is possible with the other settings:

Role: Standard
Color

User: Elias

A-Plan Projects Resources Columns Functions

	Project / Task	Role- Setting	Parent setting	Create	Chan...	Read	no
1	▼ (default setting)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2	> E-Business integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
3	> Examples	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Role Setting
Special User Setting

If you want the original (role) setting to apply again, check the box in the **Role settings** column.

Hint:

If the **Parent setting** was activated for a child task and the **Role setting** was activated

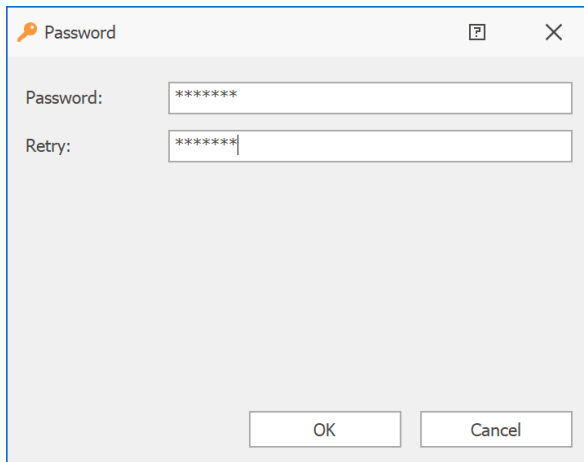
there, the settings applied to the parent task by the role do not apply to the child task, but the role settings of the child task do.

Number of licenses

Below the table of users, the number of currently used and available licenses is displayed.

Role	Defa... sett.	Full access	Read only	Mas- ter	Admin	Web Viewer	Time- track.	Sync.
			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Standard								
Standard	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Used licenses:		4	0			1	1	0
Available licenses:		5	4			5	2	2

Change password



The password can be changed after logging in by calling **Tools / Password**.

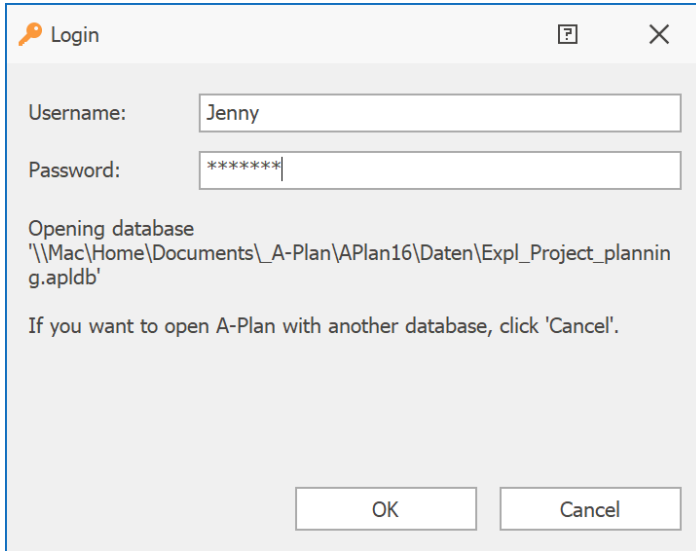
If you leave the input fields empty, no password needs to be entered to open the database.

Please make sure that the password is **case sensitive** and that the password is only valid for the current database!

Note:

If you have forgotten the password, it can be reset in administrator mode (see "Create users" on page 146).

Logging in when calling a database



The image shows a 'Login' dialog box with a title bar containing a key icon, the text 'Login', a help icon, and a close button. The dialog has two input fields: 'Username:' with the text 'Jenny' and 'Password:' with masked characters '*****'. Below the fields, it says 'Opening database' followed by the path '\\Mac\Home\Documents_A-Plan\APlan16\Daten\Expl_Project_planning.apldb'. A message at the bottom states 'If you want to open A-Plan with another database, click 'Cancel''. At the bottom right are 'OK' and 'Cancel' buttons.

Username: Jenny

Password: *****

Opening database
'\\Mac\Home\Documents_A-Plan\APlan16\Daten\Expl_Project_planning.apldb'

If you want to open A-Plan with another database, click 'Cancel'.

OK Cancel

In case of a network license, a user name and the corresponding password must always be entered to open a database.

SPECIAL FUNCTIONS

IMPORT

General information

Importing data from other applications is done either in **MS Excel format (xlsx)** or in **xml format** if an **MS Project file** is to be read in (see "Worksheet "Absences1"

Designation	Type	Value range	Content	Refer. in A-Plan
No*	Number	1 – 2 billion	unique numbering of the lines in the import file	-
Resource_Name* ¹	Text	-	name of the resource	resource
Resource_ID* ¹	Number	1 – 2 billion	ID (assigned by A-Plan)	ID
Ident_No* ¹	Text	-	Ident number of the resource	Ident-No
Absence* ²	Text	-	Designation of absence	-
Absence_ID* ²	Text	-	Arbitrary text used to locate the absence if changes are to be made.	-
Start*	Date/Time	Date (with time)	Start of absence	Start pld.
End* ³	Date/Time	Date (with time)	End of absence	End pld.
Duration* ³	Number	-	Duration of absence	Duration pld.
Color_No	Number	1 – 2 billion	number of the pattern (see "Bar pattern" on page 122)	-
Note	Text	-	Note of absence (without formatting!)	Note

¹ One of these 3 values must be entered, whereby the Resource_ID or the Ident_No are to be preferred, as resource names can occur several times.

² If a (unique) Absence_ID was imported during the first import, the name of the absence can be omitted in case of changes.

³ Only one of the two values must be specified.

xml format (MS Project)" on page 165).

Hint:

When importing or exporting (see "Export" on page 166) not all information available in A-Plan can be transferred, e.g. several time bars in one row, different processing times of resources etc.. Export and Import are therefore only of limited use for exporting, modifying or supplementing data and then importing it again.

Rather, they are primarily used to transfer data from other programs to A-Plan once or to make it available to other programs.

MS Excel format

General remarks

The MS Excel file must contain at least one of the worksheets **Task_Table1**, **Resource_Table1** or **Absences1**.

The order of the columns in the worksheets is arbitrary.

Columns whose names are marked with "*" must always be present.

An example can be found in the program directory of A-Plan ("c:\Program Files\A-Plan X\Import_en.xlsx").

Hint:

Unlike previous versions of A-Plan, **import** and **export** is possible even if there **is no installed version of MS Excel** on the computer used.

Worksheet "Task_Table1"

Designation	Type	Value range	Content	Refer. in A-Plan
No*	Number	1 - 2 billion	unique numbering of the rows in the import file	-
Name	Text	-	Name of task	Task name
Ident_No	Text	-	Ident number	ID
Outline_Level*	Number	1 - 99	1: Level 1 ("Folder" in A-Plan) 2: Level 2 ("Project" in A-Plan) 3 - 99: Level 3 - 99 ("Task" in A-Plan)	-
Summary	Text	'Yes' or 'No	Heading Yes/No	-
Priority	Number or text	0 - 99 or text (see explanations below)	Priority empty: 2 is used	Priority
Resource_Names	Text	(see explanations below)	Resource name/load	Resources
Created	Date/Time	Date (with time)	Date of receipt	Input
Start	Date/Time	Date (with time)	planned start	Start planned
End	Date/Time	Date (with time)	planned end	End planned
Duration	Date/Time	Number	Duration in units of 'Time_Unit_Effort' (as a decimal fraction) (used when there is no planned end)	Duration planned
Time_Unit_Effort	Number	1 - 6 (see explanations below)	Time unit of duration/effort	Time unit duration
Required_Effort	Number	Number	Required effort in units of 'Time_Unit_Effort'	Effort required.
Predecessor	Text	(see explanations below)	Numbers of the predecessors and type of link	Link

Start_earliest	Date/ Time	Date (with time)	Earliest Start	Start earli- est
Start_latest	Date/ Time	Date (with time)	Latest Start	Start no later than
End_latest	Date/ Time	Date (with time)	Latest End	End at the latest
Actual_Start	Date/ Time	Date (with time)	Actual start empty: planned start is used	Start actual
Actual_End	Date/ Time	Date (with time)	Actual end empty: planned start is used or - if available - calculated by means of 'Actu- al_Duration'.	End actual
Actual_Duration	Date/ Time	Number	Actual duration in days (as a decimal fraction) (used if there is no planned end).	Duration actual
Percent_Completed	Num- ber	0 % - 32000 %	Completion status in %	Completed %
Pattern	Num- ber	0 - 49	Number of the pattern used for the time bar	Pattern
Completed	Date/ Time	Date (with time)	Completion date (when task is completed)	Completed at
Object1 - Object5	Text	-	Name (incl. directory) of a file to be linked	Object 1 - Object 5
Notes	Text	-	Note text of the row (without formatting!)	Note
Notes_Time_Bar	Text	-	Note text of the time bar (without formatting!)	Note of time bar
Time_Unit_Cost**	Num- ber	1 - 6 (see ex- planations be- low)	Unit of time of the cost	Time unit costs
Costs_rate_pld**	Num- ber	-	Planned costs per time unit	Costs rate planned
Costs_rate_act**	Num- ber	-	Actual cost per time unit empty: planned value is used -999999: default value is used	Costs rate actual

Fixed_Cost_pld**	Number	-	Fixed costs planned	Fixed costs planned
Fixed_Cost_act**	Number	-	Fixed costs actual	Fixed costs actual
Text1 - Text10	Text	-	Any text	Text1 - Text10
Number1 - Number10	Number	-	Any number	Number1 - Number10

** If resources have been assigned (**Resources** column), these values are not taken into account, since in this case the values specified for the resources apply (see "Worksheet "Resource_Table1" on page 164):

Explanations

Resources

Names of the assigned resources and their workload (in square brackets), if it is not 100%. Several resources must be separated by semicolons (;). The names of the resources must be available in the column "Name" of the worksheet "Resource table1" (see "Worksheet "Resource_Table1" on page 164).

Example:

"Jenny;Tom[80%];Truck 1" or " Jenny;Tom[0.8];Truck 1"

Predecessor

The values are each composed of one or more numbers of the predecessor(s) (as indicated in the "No" column) and the type of link:

Format: n[VA][x];n[VA][x];n[VA][x] ...

n	Number of the predecessor (see column "Nr")
VA	Type of linkage:
	"ES" (or blank) End/Start
	"SS " Start /Begin
	"SE " Start/End
	"EE " End/End

Examples:

Value	Meaning in A-Plan
"3"	a predecessor, end to start linkage

"3SS;5SE"	two predecessors, first with start to Start linkage, second with start to end linkage
-----------	---

Time units

Value	Time unit
"1"	Minute
"2"	Hour
"3"	Day
"4"	Week
"5"	Month
"6"	Year
(blank)	Default value is used

Worksheet "Resource_Table1"

Designation	Type	Value range	Content	Refer. in A-Plan
No*	Number	1 - 2 billion	unique numbering of the rows in the import file	-
Name*	Text	-	Resource name	Resource
Outline_Level*	Number	1 - 99	Level at which the resource group or resource is located.	-
Ident_No	Text	-	Ident number of the resource	ID
Fixed_Cost_pld**	Number	-	Fixed costs planned	Fixed costs planned
Fixed_Cost_act**	Number	-	Fixed costs actual	Fixed costs actual
Costs_rate_pld**	Number	-	Planned costs per time unit	Costs rate planned
Costs_rate_act**	Number	-	Actual cost per time unit empty: planned value is used -999999: default value is used	Costs rate actual
Note	Text	-	Note text of the resource (without formatting!)	Note
Object1 - Object5	Text	-	name (incl. directory) of a file	Object 1 -

			to be linked	Object 5
Time_Unit_Cost	Number	1 - 6 (see explanations "Task_Table1")	Unit of time of the cost	Time unit Costs
Text1 - Text10	Text	-	Any text	Text1 - Text10
Number1 - Number10	Number	-	Any number	Number1 - Number10

Worksheet "Absences1"

Designation	Type	Value range	Content	Refer. in A-Plan
No*	Number	1 – 2 billion	unique numbering of the lines in the import file	-
Resource_Name* ¹	Text	-	name of the resource	resource
Resource_ID* ¹	Number	1 – 2 billion	ID (assigned by A-Plan)	ID
Ident_No* ¹	Text	-	Ident number of the resource	Ident-No
Absence* ²	Text	-	Designation of absence	-
Absence_ID* ²	Text	-	Arbitrary text used to locate the absence if changes are to be made.	-
Start*	Date/Time	Date (with time)	Start of absence	Start pld.
End* ³	Date/Time	Date (with time)	End of absence	End pld.
Duration* ³	Number	-	Duration of absence	Duration pld.
Color_No	Number	1 – 2 billion	number of the pattern (see "Bar pattern" on page 122)	-
Note	Text	-	Note of absence (without formatting!)	Note

¹ One of these 3 values must be entered, whereby the Resource_ID or the Ident_No are to be preferred, as resource names can occur several times.

² If a (unique) Absence_ID was imported during the first import, the name of the absence can be omitted in case of changes.

³ Only one of the two values must be specified.

xml format (MS Project)

Data exchange between A-Plan and MS Project is done in **xml format**. This format is used to transfer all data that is supported by both programs, e.g. also dependencies, resources with their assignments and workloads, calendars, scopes of tasks, notes, links, etc.

The following data cannot be transferred because they are handled differently by the two programs:

Buffer

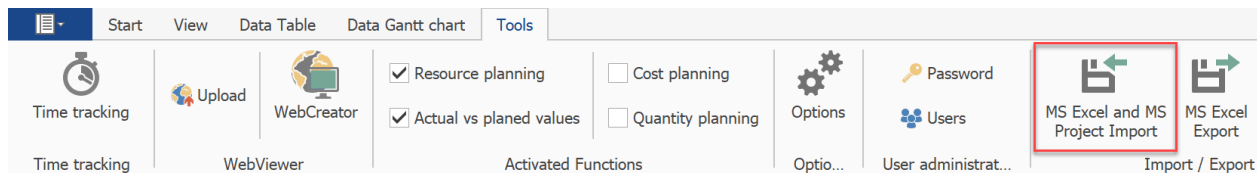
Interruptions

Time bar colors

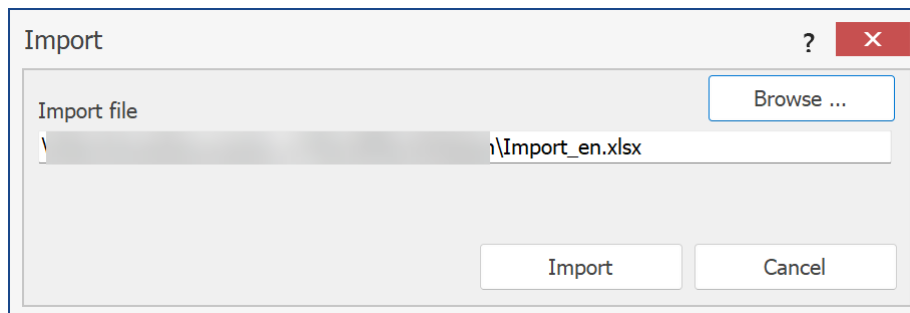
Actual times

Importing the import file with A-Plan

The import function is called up in A-Plan in the **Tools** tab:



Then, at **Import file**, enter the name of the file containing the data to be imported (extension xls, xlsx or xml):



After pressing **Import**, the data will be read in and inserted in the main table of A-Plan **after the currently selected row**.

EXPORT

General information

Exporting data is done in the same **MS Excel format (xlsx)** as importing (see "MS Excel format" on page 160), so that an exported file can also be imported again, but see notes in the "General remarks" on page 160.

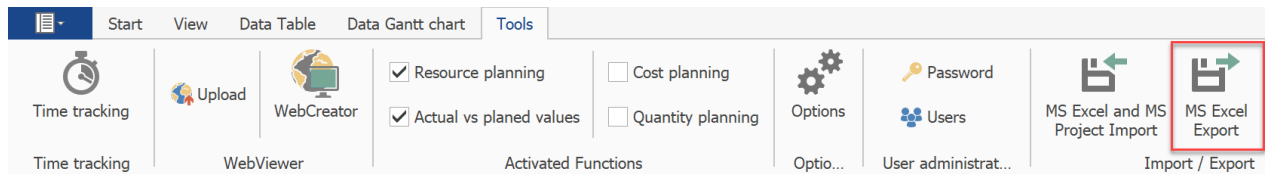
For the export a template file is used, whereby both the desired columns, the format of the columns, as well as their order can be determined. You can find a template in the A-Plan program directory ("c:\Program Files\A-Plan X\Export.xlsx"). You can copy the tem-

plate and adapt it for your purposes as you like, but you must not change any column names.

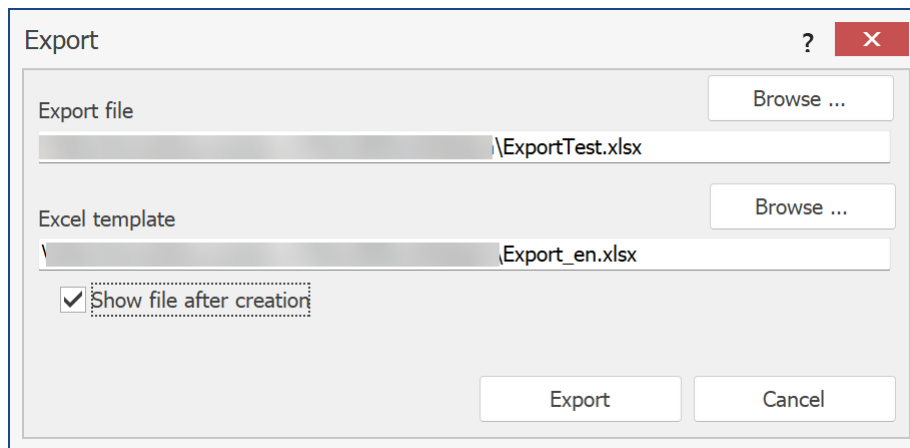
Basically, all rows currently visible in the main tables of A-Plan (projects and resources) are exported. The opening state is also taken into account, i.e. rows that are not visible because of a parent closed row are not exported.

Calling the export

The export function is called up in A-Plan in the **Tools** tab:



For **Excel Template**, enter the template you want to use, and for **Export File**, enter the name of the file you want to create, and then click Export:



SYNCHRONIZE / INTERFACE (OPTIONAL)

General notes

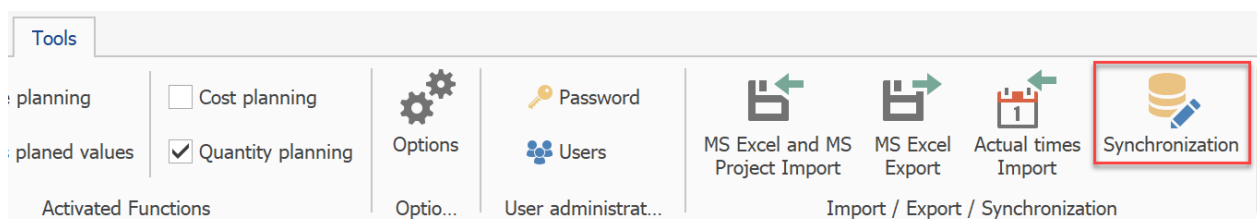
In contrast to import (see "Import" on page 159), which is primarily intended for the one-time transfer of data from other programmes, synchronization is suitable for constantly synchronising data in A-Plan with the data of an external programme, such as changes to deadlines, notes, completions, new data, deletions of processes, etc. This means that A-Plan can be used, for example, to visualise the data of an ERP programme with the help of the Gantt chart and the display of resource allocation and utilisation, as these options are lacking in many planning programmes or are not available in them.

In this way, A-Plan can be used, for example, to visualise the data of an ERP programme with the help of the Gantt chart and the display of resource allocation and utilisation, as these possibilities are missing or only rudimentarily available in many planning programmes.

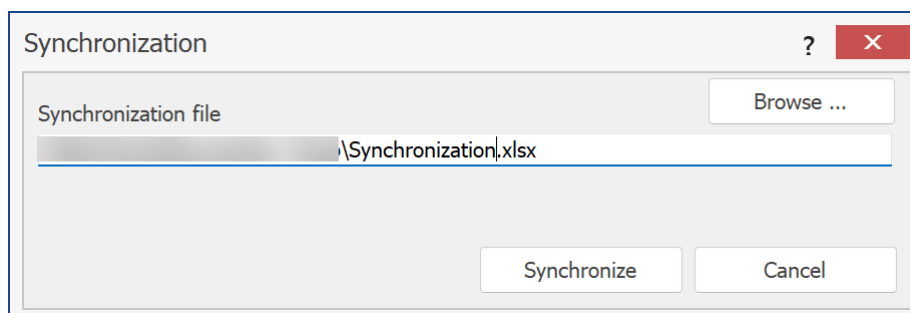
The data of the external programme is not accessed directly, as their data structures are very different, but an MS Excel file is used as an interface, as almost all planning programmes are able to write the required data into an MS Excel file. This also has the advantage that no additional programming or adjustments are required.

Starting the synchronization

Synchronization is called up in A-Plan in the **Tools** tab:



Then, for **Synchronization file**, enter the name of the file that contains the data to be synchronised:



After clicking **Synchronize**, the synchronization starts.

Automation

The settings for automated synchronization can be found in the **options** on the **Synchronization** tab:

The screenshot shows the 'Synchronization' settings window. On the left sidebar, the 'Synchronization' option is highlighted under the 'Options' category. The main panel displays the following settings:

- Synchronization file:** Synchronize.xlsx
- Check for new file each:** 15 min
- ☒ **Cancel if error occurs**
- ☒ **do not display messages during automatic synchronization**
- User for which the synchronization is to be started:** User 1

Synchronization file

Name of the synchronization file incl. path.

Check for new file

Interval (in minutes) after which it is checked whether the time stamp of the synchronization file is newer than the time of the last synchronization. The value must be either 0 or ≥ 10 . If 0, no automatic synchronization takes place.

Do not display messages during automatic synchronization

No messages are displayed on the screen during automatic synchronization. However, information can also be taken from the log file in this case (see "Log file" on page 190).

Cancel if error occurs

If this option is activated, the synchronization will be cancelled if an error occurs.

Users for which synchronization should be started

Automatic synchronization only takes place if A-Plan is opened by a user selected in the list of options. Please note that the list only shows users who have been enabled for synchronization in the user administration!

If **several users have been selected**, synchronization will only be carried out if no other user is currently synchronising at the current time or has synchronised less minutes ago than specified in the **check for new file**.

Format of the MS Excel file

General remarks

- The MS Excel file must contain at least one of the worksheets **Task_Table1**, **Resource_Table1** or **Absences1**.
- The order of the columns in the worksheets is arbitrary.
- An example can be found in the A-Plan program directory ("c:\Program Files\A-Plan X\Synchronize.xlsx").

The format of the MS Excel file can be adapted flexibly so that both the scope of the data to be synchronised and the sequence of the fields can be defined as desired.

The format is based on the format used for import or export, but has some deviations and additional columns.

Worksheet "Task_Table1"

Designation	Type	Value range	Content	Refer. in A-Plan
No*	Num-ber	1 - 2 billion	unique numbering of the rows in the import file	-
Delete ¹	Text	-	x or empty	-
Task_ID*	Zahl	1 – 2 billion	Internal database ID of the task	ID
Sync_ID* ²	Text	max. 64 characters	ID for unambiguous identification of the task or time bar.	Synchron ID
Task_Ident_No*	Text	-	Ident number of task	Ident-Nr. des Vorgangs
Name	Text	-	Name of task	Task name
Outline_Level*	Num-ber	1 - 99	1: Level 1 ("Folder" in A-Plan) 2: Level 2 ("Project" in A-Plan) 3 - 99: Level 3 - 99 ("Task" in A-Plan)	-
Summary	Text	'Yes' or 'No	Heading Yes/No	-
Type* ³	Num-ber	1 - 4	Type of task	-
Priority	Num-ber or text	0 - 99 or text (see explanations below)	Priority empty: 2 is used	Priority
Resource_Names	Text	(see explanations below)	Resource name/workload	Resources
Resource_Ident_No ⁴	Text	-	Ident-Nummer of resource(s)/workload	Resources
Created	Date/Time	Date (with time)	Date of receipt	Created
Reminder date	Date/Time	Date (with time)	Reminder date	Reminder
Start	Date/Time	Date (with time)	planned start	Start planned

End	Date/ Time	Date (with time)	planned end	End planned
Duration	Date/ Time	Number	Duration in units of 'Time_Unit_Effort' (as a deci- mal fraction) (used when there is no planned end)	Duration planned
Required_Effort	Num- ber	Number	Required effort in units of 'Time_Unit_Effort'	Effort re- quired.
Predecessor	Text	(see explana- tions below)	Numbers of the predecessors and type of link	Link
Start_earliest	Date/ Time	Date (with time)	Earliest Start	Start earli- est
Start_latest	Date/ Time	Date (with time)	Latest Start	Start no later than
End_latest	Date/ Time	Date (with time)	Latest End	End at the latest
Actual_Start	Date/ Time	Date (with time)	Actual start empty: planned start is used	Start actual
Actual_End	Date/ Time	Date (with time)	Actual end empty: planned start is used or - if available - calculated by means of 'Actu- al_Duration'.	End actual
Actual_Duration	Date/ Time	Number	Actual duration in days (as a decimal fraction) (used if there is no planned end).	Duration actual
Color_No ⁶	Num- ber	0 – 32000	Number of the pattern used for the task	-
Co- lor_No_Time_Bar ⁶	Num- ber	0 – 32000	Number of the pattern used for the time bar	-
Percent_Completed	Num- ber	0 % - 32000 %	Completion status in %	Completed %
Completed	Date/ Time	Date (with time)	Completion date (when task is completed)	Completed at
Object1 - Object5	Text	-	Name (incl. directory) of a file to be linked	Object 1 - Object 5

Notes	Text	-	Note text of the row (without formatting!)	Note
Notes_Time_Bar	Text	-	Note text of the time bar (without formatting!)	Note of time bar
Costs_rate_pld**	Num- ber	-	Planned costs per time unit	Costs rate planned
Costs_rate_act**	Num- ber	-	Actual cost per time unit empty: planned value is used -999999: default value is used	Costs rate actual
Fixed_Cost_pld**	Num- ber	-	Fixed costs planned	Fixed costs planned
Fixed_Cost_act**	Num- ber	-	Fixed costs actual	Fixed costs actual
Fixed_Cost_progn ⁷	Num- ber	-	Fixed costs prognosis empty: planned value is used	Fixed costs progn.
Quantity_pld	Num- ber	-	Quantity planned	Quantity pld
Quantity_act	Num- ber	-	Quantity actual empty: planned value is used	Quantity act
Quanti- ty_per_time_pld ⁷	Num- ber	-	Quantity per hour planned	Quantity per time pld
Quanti- ty_per_time_act ⁷	Num- ber	-	Quantity per hour actual empty: planned value is used	Quantity per time act
Email_address ⁷	Text	-	Email adress(es)	email
Text1 - Text10	Text	-	Any text	Text1 - Text10
Number1 - Num- ber10	Num- ber	-	Any number	Number1 - Number10
Options ⁸	Text	-	-	-

Explanations

*

Column must always be present. For the columns "Sync_ID", "Task_ID" or "Task_Ident_No" one entry is sufficient.

Delete¹

If there is an "x" in this column, the corresponding task or time bar is deleted in A-Plan. Other entries are ignored.

Synchron_ID²

Any text that uniquely identifies the task or time bar. If no value is specified in the Excel file, A-Plan sets a synchronous ID that starts with "|" and is followed by a consecutive 10-digit number, e.g. "|0000000001".

No pure number should be used, otherwise there would be assignment problems in the column "Predecessor" (there pure numbers always refer to the column "No", see footnote 5). So do not use "12345", but e.g. "S12345".

Hint:

Tasks without Sync_ID may be created several times during multiple synchronization, as they cannot be identified during synchronization if they already exist!

Type^{*3}

1 = Heading

2 = Task

3 = Resource line

4 = Time bar (if type = 2 or 3, ONE time bar is created if a date has been entered. Type 4 can be used if additional time bars are to be created at the previous task or resource line.

Resource_Names⁴, Resource_Ident_No⁴

Identifiers of the assigned resources and their workload (in square brackets), if this is not 100%. More than one resource must be separated by semicolons (;).

Example:

"Steve; Mike [80%]; Truck 1" or " Steve; Mike [0.8]; Truck 1".

If the resources already exist in the database, their indent numbers can be used instead of the names.

Example:

"70000200 [20,0%]; 70000300 [20,0%]; 70000100 [15,0%]"

Predecessor⁵

The values are each composed of one or more references of the predecessor(s) and the type of link. The reference can be either the number from the column "No" or the "Sync_ID".

Format: n[VA][x];[n[VA][x]]:[n[VA][x]] ...

n	Number of the predecessor (see column "Nr")
VA	Type of linkage:

	"ES" (or blank)	End/Start
	"SS "	Start /Begin
	"SE "	Start/End
	"EE "	End/End

Examples:

Value	Meaning in A-Plan
"3"	one predecessor, end to start linkage
"S003SS; S005SE"	two predecessors, first with start/start link, second with start/end link, reference = "Sync_ID"

Colour_No⁶, Colour_No_bar⁶

The number corresponds to the number in the list of individual or priority-dependent patterns in the options, see "Bar pattern" on page 122.

...⁷

If a value has been entered in one of the columns marked with footnote 7, it will be interpreted by A-Plan as a fixed value (see also footnote 8), i.e. it will no longer be used, for example, the value that is the default value for the resource, see "Default values of the resources" on page 91.

Options⁸

The Options field can be used to specify a larger number of properties of an operation. In most cases it can be left blank, or it can contain a text string of up to 19 characters, where each character describes a particular property:

Item	Meaning	Value range
1	Cost rate planned *	see below
2	Cost rate is **	see below
3	Fixed costs planned *	see below
4	Fixed cost is **	see below
5	Quantity per hour planned *	see below
6	Quantity per hour is **	see below
7	(not used)	blank
8	E-mail address *	see below
9	Status "question mark"	blank, 0 or 1 (= yes)
10	Status "critical"	blank, 0 or 1 (= yes)
11	(not used)	blank
12	Status "passive"	blank, 0 or 1 (= yes)
13	Status "deleted"	empty, 0 or 1 (= yes)
14	(not used)	blank
15	(not used)	blank
16	(not used)	blank
17	(not used)	blank
18	Status "flag arrow"	blank, 0 or 1 (= yes)
19	Fixed costs forecast **	see below

* The following values are allowed for planned values and the e-mail address:

0 take value from higher-level operation

1 fixed value (as specified in the corresponding column with footnote 7)

3 or blank Use resource value (default)

Note: If a value has been entered in the corresponding column, "1" is automatically assumed (can then also remain empty), even if a different value has been entered at the corresponding position in the options!

** The following values are permissible for actual values and fixed costs forecast:

0 Take over value from superordinate operation

1 fixed value (as specified in the corresponding column with footnote 7)

2 Use planned value or empty (default)

3 use resource value

Note: If a value has been entered in the corresponding column, "1" is automatically assumed (can then also remain empty), even if a different value has been entered at the corresponding position in the options!

Example:

"0 3"

0 "Planned cost rate" as for the higher-level item

blank take over "Cost rate is" from the assigned resource(s)

blank take over "Planned fixed costs" from the assigned resource(s) or - if available -
 use the value entered in the column "Fixed_cost_pld"

3 take over "Fixed costs actual" from the assigned resource(s)

Worksheet "Resource_Table1"

Designation	Type	Value range	Content	Refer. in A-Plan
No*	Number	1 - 2 billion	unique numbering of the rows in the import file	-
Delete ¹	Text	-	x or empty	-
Sync_ID* ²	Text	max. 64 characters	ID for unambiguous identification of the task or time bar.	Synchron ID
Resource_ID*	Zahl	1 – 2 Billion	Internal database ID of the resource	ID
Name*	Text	-	Resource name	Resource
Group*	Text	„Yes“ or „No“	Rwo represents a group	-
Outline_Level*	Number	1 - 99	Level at which the resource group or resource is located.	-
Ident_No	Text	-	Ident number of the resource	ID
Fixed_Cost_pld**	Number	-	Fixed costs planned	Fixed costs planned
Fixed_Cost_act**	Number	-	Fixed costs actual	Fixed costs actual
Costs_rate_pld**	Number	-	Planned costs per time unit	Costs rate planned
Costs_rate_act**	Number	-	Actual cost per time unit empty: planned value is used -999999: default value is used	Costs rate actual
Quantity_per_time_pld	Number	-	Quantity per hour planned	Quantity per time pld
Quantity_per_time_act	Number	-	Quantity per hour actual empty: planned value is used	Quantity per time act
Email_address	Text	-	Email adress(es)	email
Calendar	Text	-	Name of the calendar to be used for the resource empty: default calendar is used	Default calendar

Holidays	Text	-	Name of the holidays to be used for the resource empty: default holidays are used	Holidays
Color_No ³	Number	0 – 32000	Number of the pattern used for the resource	-
Note	Text	-	Note text of the resource (without formatting!)	Note
Object1 - Object5	Text	-	name (incl. directory) of a file to be linked	Object 1 - Object 5
Time_Unit_Cost	Number	1 - 6 (see explanations "Task_Table1")	Unit of time of the cost	Time unit Costs
Text1 - Text10	Text	-	Any text	Text1 - Text10
Number1 - Number10	Number	-	Any number	Number1 - Number10

Explanations

*

Column must always be present. For the columns "Sync_ID", "Resource_ID", "Name" or "Ident_No" one entry is sufficient.

Delete¹

If there is an "x" in this column, the corresponding resource is deleted in A-Plan. Other entries are ignored.

Synchron_ID²

Any text that uniquely identifies the task or time bar. If no value is specified in the Excel file, A-Plan sets a synchronous ID that starts with "|" and is followed by a consecutive 10-digit number, e.g. "|0000000001".

Color_No³

The number corresponds to the number in the list of individual or priority-dependent patterns in the options, see "Bar pattern" on page 122.

Worksheet "Absences1"

Designation	Type	Value range	Content	Refer. in A-Plan
No*	Number	1 – 2 billion	unique numbering of the lines in the import file	-
Delete ¹	Text	-	x or empty	-
Sync_ID* ²	Text	max. 64 characters	ID for unambiguous identification of the task or time bar.	Synchron ID
Resource_Name* ¹	Text	-	name of the resource	resource
Resource_ID*	Number	1 – 2 billion	ID (assigned by A-Plan)	ID
Ident_No*	Text	-	Ident number of the resource	Ident-No
Absence*	Text	-	Designation of absence	-
Absence_ID*	Text	-	Arbitrary text used to locate the absence if changes are to be made.	-
Start*	Date/Time	Date (with time)	Start of absence	Start pld.
End* ³	Date/Time	Date (with time)	End of absence	End pld.
Duration* ³	Number	-	Duration of absence	Duration pld.
Color_No ⁴	Number	1 – 2 billion	number of the pattern (see "Bar pattern" on page 122)	-
Note	Text	-	Note of absence (without formatting!)	Note

Explanations

*

Column must always be present. For the columns "Resource_Name", "Sync_ID", "Resource_ID" or "Ident_No" one entry is sufficient.

Delete¹

If there is an "x" in this column, the corresponding absence is deleted in A-Plan. Other entries are ignored.

Sync_ID²

Any text that uniquely identifies the task or time bar. If no value is specified in the Excel file, A-Plan sets a synchronous ID that starts with "|" and is followed by a consecutive 10-digit number, e.g. "|0000000001".

End³, Duration³

Only one of the two values must be specified.

Color_No⁴

The number corresponds to the number in the list of individual or priority-dependent patterns in the options, see "Bar pattern" on page 122.

Log file

In the directory where the synchronization file is located, a log is created in the **syn-chron.log** file after each synchronization:

Example of an entry in the log file:

```
*****Synchronization Start: 05.03.2023 15:01:35*****
```

Absences: Error line no. 3: Resource not found

Tasks: Error line 39, column 'Resource_Names': Resource 'WBA GmbH' not found!

synchronised tasks: 2

synchronised time bars: 1

synchronised links: 2

synchronised resources: 1

synchronised assignments: 1

synchronised tasks: 0

synchronised absences: 0

Errors: 2

SQL VERSION

WHAT IS A-PLAN SQL?

A-Plan SQL is an additional variant of A-Plan, where the data can be stored alternatively on a **Microsoft SQL Server**, thus offers **higher performance** and **data security** than the standard version of A-Plan.

Since it is possible to switch from the standard version to the SQL version at any time and existing data can be transferred to the SQL server without any problems, you can start with the standard version first and switch to the SQL version later. This does not result in a financial disadvantage, as only the difference in price between the two versions has to be paid.

SYSTEM REQUIREMENTS

Use of a Microsoft SQL Server

A-Plan SQL additionally requires the installation of one of the following software packages on the used network server when using an **MS SQL Server**:

- **Microsoft SQL Server** (from version 2008) or
- **Microsoft SQL Server Express Edition** (from version 2008)

The **Microsoft SQL Server Express Edition** is available free of charge. This free version is not as powerful as the official and paid **Microsoft SQL Server**, but it is usually quite sufficient for use with **A-Plan SQL**.

If you do not yet have **Microsoft SQL Server**, it is best to install the **Microsoft SQL Server Express Edition**. You can find it on the Microsoft website ([SQL Server Downloads | Microsoft](#) as of 06/2020).

To manage SQL Server, you should also install **Microsoft SQL Server Management Studio** (<https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms>).

Optimally, A-Plan should have its own SQL server, but this is not a prerequisite.

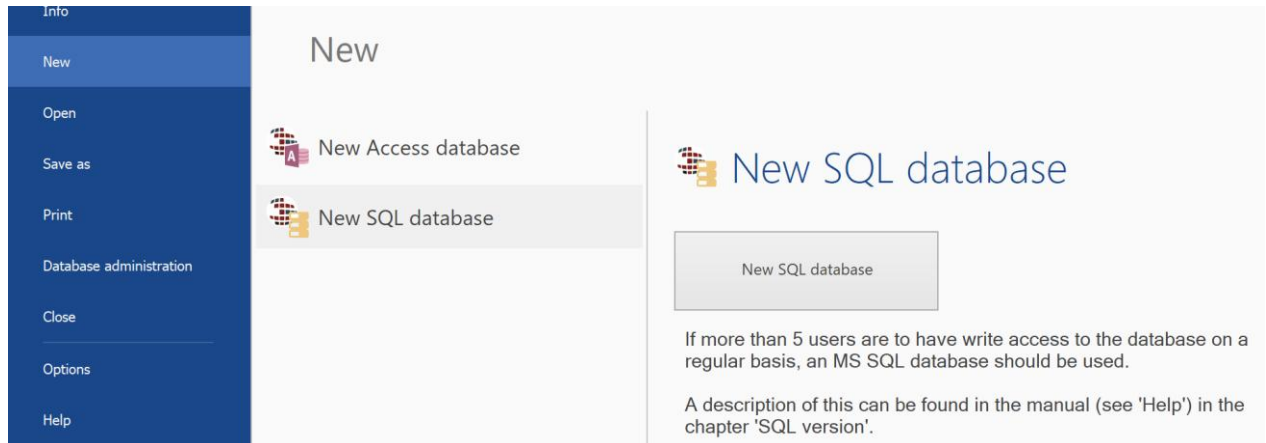
Detailed information on installing and managing SQL Servers can be found in the manufacturer's documentation or on the Internet.

FILE FUNCTIONS IN THE SQL VERSION

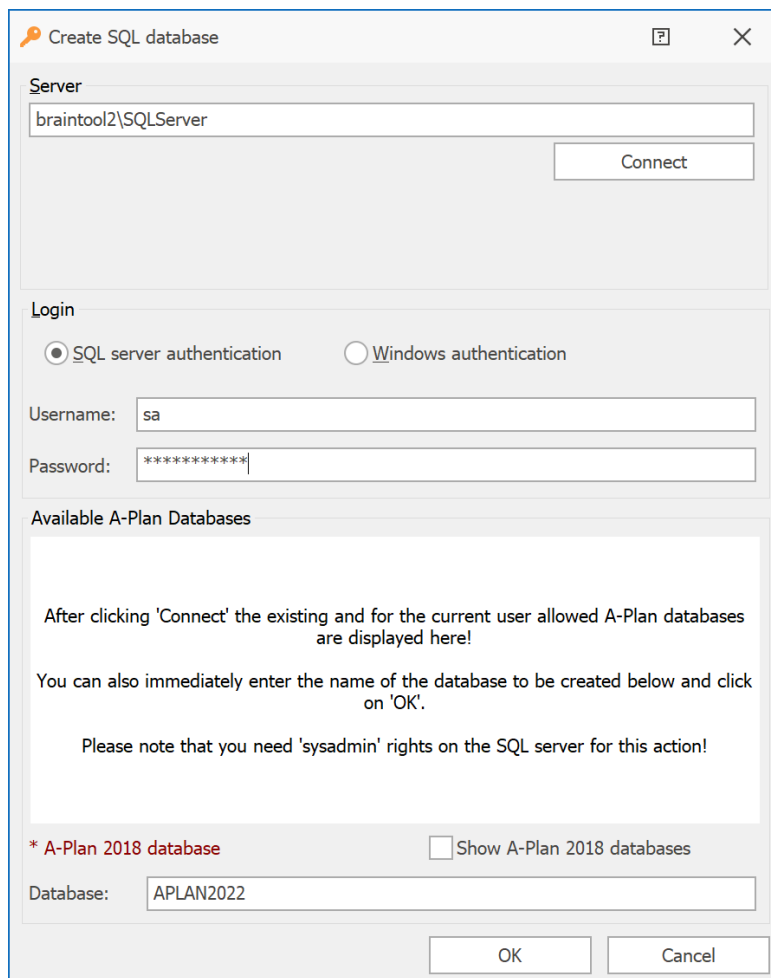
Create new SQL database

1. Call function

Execute the **New** command in the **File** tab and choose **New SQL database**:



2. Save database



In the dialog box for saving the database, enter the name of your SQL server and enter a user who has **sysadmin permission on the SQL server**, as it is required for creating databases.

The best way to do this is to use the user **sa that** is normally available on every SQL server.

Log in to the SQL Server by clicking **Connect**.

If the connection cannot be established, please check the server name or your login data (see also chapter "System requirements" on page 182.)

Then enter a name for the database below. The database will be created.

3. Enter password

The database is then first opened with the user **admin** (see "User "admin" and "webadmin"." on page 148), for which you must enter a password.

If you have already created A-Plan databases and therefore the user **admin** already exists, you can enter the password used so far or set a new one.

Please note here that passwords for A-Plan SQL databases are always the same for all databases and can also be set directly on the SQL server!

Hint:

The name of the A-Plan administrator - **admin** - is usually already occupied on an SQL server. He is therefore called **aplan_admin** on the SQL server. Nevertheless, the login under A-Plan can be done as **admin**, because this designation is automatically extended by A-Plan to **aplan_admin** and thus passed on to the SQL server.

4. create users

Then call up the user administration in the **Tools** menu by clicking on **Users**:

User administration									
	Logged on	Group / Name ▲	Password	Role	Defa... sett.	Full access	Read only	Mas-ter	Admin
1		(new group)							
2		▼ Administrators							
3		admin	*****				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4		webadmin	*****				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5		▼ Group 1		Standard					
6		(new user)							

By default, the users **admin**, **user 1** and **webadmin** are created. You have already entered the password for **admin** when creating the database. You can enter those of the other two users either here or directly on the SQL server.

Additional users or groups can be created by overwriting **(new group)** or **(new user)** or taken over from the SQL server if they already exist there.

Users newly created in A-Plan user management are created on SQL server.

Both users and groups of users for the A-Plan database that are **already on the SQL server** can be transferred.

By clicking the **Show available users of the SQL server** button, all users (logins) and groups already present on the SQL server are available for transfer in the user list:

Benutzerverwaltung				
	über-nehmen	Gruppe / Name ▲	Import in Gruppe	Anmeldung
113	<input type="checkbox"/>		Gruppe 1	SQL_LOGIN
114	<input checked="" type="checkbox"/>	▼ Entwicklung	(SQL Server Gruppe)	
115	<input checked="" type="checkbox"/>	Christian	(SQL Server Gruppe)	WINDOWS_LOGIN
116	<input checked="" type="checkbox"/>	Elke	(SQL Server Gruppe)	WINDOWS_LOGIN
117	<input checked="" type="checkbox"/>	Karen	(SQL Server Gruppe)	WINDOWS_LOGIN
118	<input checked="" type="checkbox"/>	Manfred	(SQL Server Gruppe)	WINDOWS_LOGIN
119	<input checked="" type="checkbox"/>	Max	(SQL Server Gruppe)	WINDOWS_LOGIN
120	<input checked="" type="checkbox"/>	Rebecca	(SQL Server Gruppe)	WINDOWS_LOGIN
121	<input checked="" type="checkbox"/>	Roberta	(SQL Server Gruppe)	WINDOWS_LOGIN
122	<input checked="" type="checkbox"/>	Selma	(SQL Server Gruppe)	WINDOWS_LOGIN
123	<input checked="" type="checkbox"/>	Stefan	(SQL Server Gruppe)	WINDOWS_LOGIN
124	<input checked="" type="checkbox"/>	Tobias	(SQL Server Gruppe)	WINDOWS_LOGIN
125	<input type="checkbox"/>		Gruppe 1	SQL_LOGIN
126	<input type="checkbox"/>		Gruppe 1	SQL_LOGIN
127	<input type="checkbox"/>		Gruppe 1	SQL_LOGIN
Abbrechen		Ausgewählte User übernehmen		verwendete Lizenzen: 0 verfügbare Lizenzen: 12

Users who are assigned to a (Active Directory) group can be taken over as a complete group and are then also managed as a group in A-Plan. For users without a group assignment, one of the existing groups can be selected before the transfer.

Hint:

When the AD group is changed, i.e. when users are added or removed, there is no automatic update in A-Plan User Management.

After selecting the users to be transferred and clicking **Transfer selected users**, the list will be closed and the users assigned to the current database will be displayed again instead:

	ange-meldet	Gruppe / Name ▲	Passwort	Rolle	Std.-Einst.	Voll-Zugriff	nur Lesen	Master
2		▼ Administratoren						
3		admin	*****				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4		webadmin	*****				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5		▼ Entwicklung		Entwicklung				
6		Christian		Entwicklung	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7		Elke		Entwicklung	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8		Karen		Entwicklung	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9		Manfred		Entwicklung	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10		Max		Entwicklung	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11		Rebecca		Entwicklung	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12		Roberta		Entwicklung	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

For users transferred from AD, it is not possible to change or delete the password from A-Plan.

Required permissions

'Master' authorization (A-Plan)

As with the standard version of A-Plan, the **User administration** can only be accessed by users who have at least '**Master' rights** for A-Plan.

No special authorization is required on the SQL server for this.

Users with master rights can change **roles and permissions**, but cannot create new users or change or delete passwords.

'Admin' authorization (A-Plan)

Admin rights are required to **create new users** or to delete or change **passwords**.

On the SQL server, users with admin rights for A-Plan are given the **securityadmin permission**, as this is required for managing users on the SQL server.

Sysadmin authorization (SQL server)

Sysadmin authorization on the SQL server is only required for creating databases and importing backups. Any user of the SQL server who has this authorization can be used for this purpose.

For this purpose, however, you can also, for example, grant the **sysadmin right to the admin** user of A-Plan on the SQL server, then the actions mentioned can also be carried out without another user. Please note that the A-Plan user '**admin' on the SQL server** is called **aplan_admin**!

From A-Plan it is not possible to grant **sysadmin rights** to a user for security reasons!

Open SQL database

Execute **Open / Browse (SQL)** command in the **File** tab.

Open SQL Database

Server

Connect

Login

☒ SQL server authentication ☐ Windows authentication

Username: User 1

Password: ****

Available A-Plan Databases

database	Size	Last change
aplan_APlanX	71 MB	13/01/2022 12:12
A-Plan2020	17 MB	05/02/2021 12:12
Demo_APlanX	80 MB	31/12/2021 10:47
NewStructureLarge_APlanX	144 MB	19/02/2021 10:00
NewStructureLarge_APlanX2	144 MB	22/05/2020 18:56
Produktionsplan_APlanX	1035 ...	14/01/2022 14:30
Test_APlanX	80 MB	

* A-Plan 2018 database ☐ Show A-Plan 2018 databases

Database: Demo_APlanX

OK Cancel

If your user name is not the Windows login, select **SQL Server Authentication**, enter your user name and password, and click **Connect**.

For **Windows authentication**, you do not need to enter anything because the current Windows user is used.

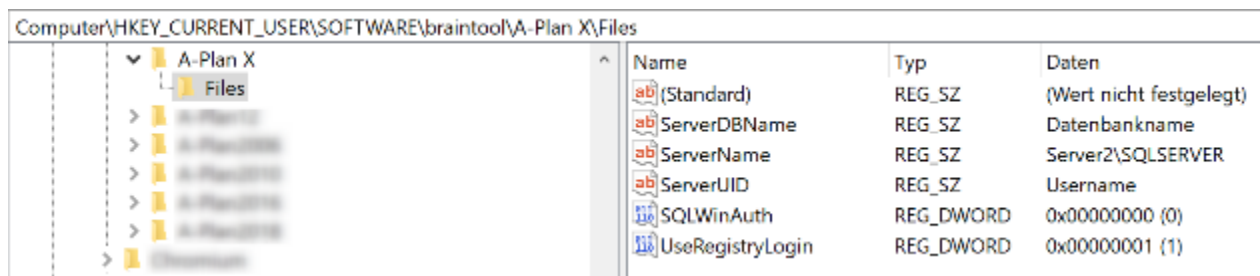
The A-Plan databases that are shared with the current user(s) are displayed in the list below.

Open the desired database by double-clicking on its name.

When opening in the future, the previous connection is not required, as the last opened database is automatically entered below and the connection is established directly after clicking **OK**.

Presetting the login data in the registry

So that users do not have to enter the login data themselves the first time they start A-Plan, they can be entered in the registry if necessary:



Name	Typ	Daten
(Standard)	REG_SZ	(Wert nicht festgelegt)
ServerDBName	REG_SZ	Datenbankname
ServerName	REG_SZ	Server2\SQLSERVER
ServerUID	REG_SZ	Username
SQLWinAuth	REG_DWORD	0x00000000 (0)
UseRegistryLogin	REG_DWORD	0x00000001 (1)

The **ServerUID** field (= user name) can remain empty, a "1" must be entered for **UseRegistryLogin** so that the registry data is used for the login.

Save as

The **Save As** command can be used to **save**

- an opened **MS Access database** to be saved on the **SQL server**,
- an opened **SQL database** can be saved as a copy under a different name on the **SQL server**,
- an opened **SQL database** is saved as an **MS Access database** and
- an opened **MS Access database** can be saved as a copy under a new name.

The command **Save SQL database as** requires a user with **sysadmin rights** for the SQL server, just like when creating a new SQL database!

The users are transferred completely with their permissions and settings (= profiles). Since the **passwords of** Active Directory users cannot be transferred to an MS Access database, the password 'aplan' is set for the affected users in these cases. The **admin** user can then delete or change the passwords of these users in the user administration.

Delete SQL database

Please delete A-Plan databases that are located on a SQL server directly on the SQL server.

Backup copies (Database management menu)

Although the Microsoft SQL server automatically creates backups of the existing databases if the appropriate settings are made, it is nevertheless recommended that you also have A-Plan create backups. The procedure is the same as for the standard version of A-Plan (see "Master database, security" on page 127), except that the backups are regular SQL Server backups that are zipped and stored in the specified folder.

The advantages are that several backups can be created in succession every day and the backups are relatively small due to compression.

The SQL version can also be backed up directly from A-Plan (see **File / Database administration**). Please note that you need a user of the MS-SQL server with **sysadmin rights to restore the database**. After restoring, the database can be opened again with the "regular" A-Plan users.

Convert database(s) from A-Plan 2018 SQL

If there are already A-Plan 2018 databases on your SQL server, they will be displayed in red color if you have enabled the Show **A-Plan 2018 databases** option in the **A-Plan X login screen**:

Open SQL Database

Server

Connect

Login

☒ SQL server authentication ☐ Windows authentication

Username: User 1

Password: ****

Available A-Plan Databases

database	Size	Last change
aplan_APlanX	71 MB	13/01/2022 12:12
A-Plan2020	17 MB	05/02/2021 12:12
Demo*	16 MB	
Demo_APlanX	80 MB	31/12/2021 10:47
NewStructureLarge*	31 MB	
NewStructureLarge_APlanX	144 MB	19/02/2021 10:00
NewStructureLarge_APlanX2	144 MB	22/05/2020 18:56

* A-Plan 2018 database ☒ Show A-Plan 2018 databases

Database: aplan_APlanX

OK Cancel

A-Plan 2018 databases are created as a **new database in A-Plan X format** by selecting it and clicking **OK**. Please note that this is only possible with a user who has admin rights for the A-Plan database and sysadmin rights on the SQL server.

The new database gets the original name with the **extension _APlanX**. Your original database will not be changed, so it can still be used with A-Plan 2018.

If necessary, the new database can be renamed directly on the SQL server and then opened under A-Plan X with the previous users.

During the conversion all data, profiles, permissions etc. are transferred as well.

Since A-Plan X can be run in parallel with A-Plan 2018 without any problems, it is possible to test the new database with A-Plan X first without any risk. Please note, however,

that a new conversion is required if other users have continued to work with A-Plan 2018 during this time, otherwise the newly entered data would be lost.

After the tests have been completed, A-Plan X can be rolled out to all other computers and work with the new version from a specified point in time. We recommend renaming the old database so that users who may not have been aware of the changeover do not continue to work with the old version and the old database.

Databases of **older versions of A-Plan** must first be converted to the format of A-Plan 2018, which is also possible with the trial version of A-Plan 2018 (see [Download PM Software Trial \(braintool.com\)](https://braintool.com/download-pm-software-trial)).

Moving A-Plan databases to another SQL server

To move an SQL database to another SQL server, we recommend opening the existing database with A-Plan X on the previous server, then using the **Save SQL Database As** function and specifying the address of the new SQL server. Please note that creating a database on the SQL server is only possible with sysadmin rights. You can use the user "sa" of the SQL server for this purpose, for example. Afterwards you can open the database with the previously used users.

There are usually no compatibility problems here, as A-Plan X can be used with all SQL servers from version 2008 onwards.

If it is not possible to access both SQL servers from one computer, you can also temporarily save the "old" SQL database as an Access database, see Save as on page 189, and then save the Access database to the new SQL server.

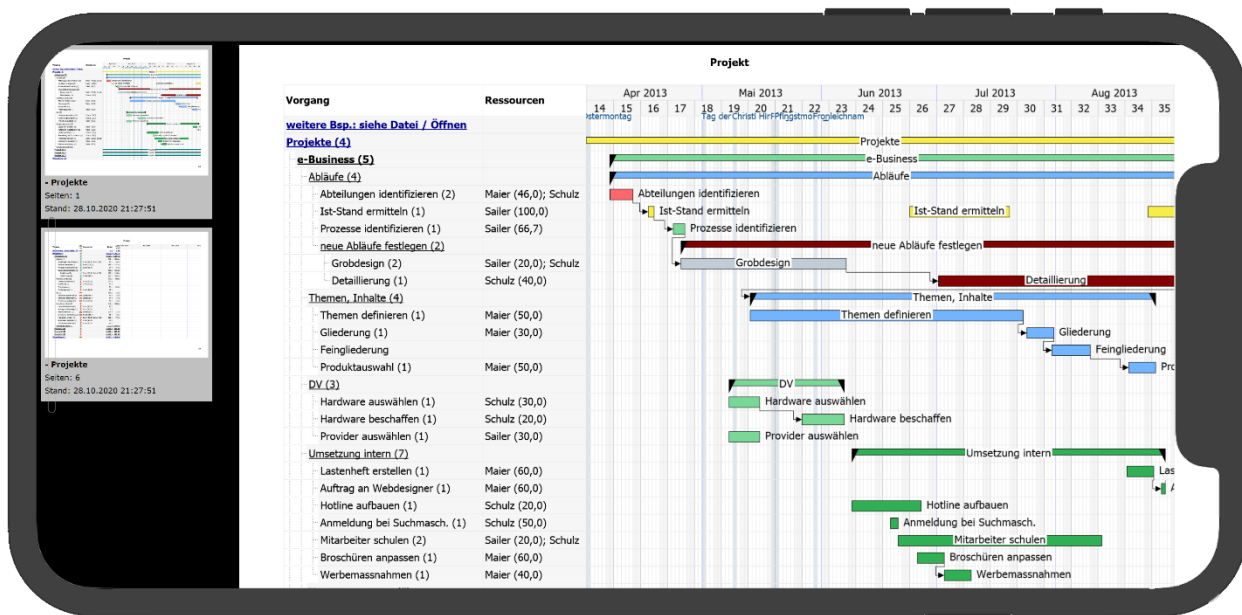
WEBVIEWER (OPTIONAL)

OVERVIEW

Current planning available anytime and anywhere

The optionally available **A-Plan WebViewer** allows to retrieve **current planning data** and **dates on any device** connected to the Internet via any browser.

This does not require any additional installation on the respective device, so that even on smartphones or a tablet all required data is always available:



Since the operating system used is also irrelevant, the data can -also be -displayed on Linux or Apple computers etc. with the A-Plan WebViewer.

The data is kept up to date by the **A-Plan WebCreator** on completely normal Internet pages at a freely adjustable interval. This allows supervisors, project participants, branch offices, field staff, fitters, customers, suppliers, etc. to be easily and automatically supplied with all the information required for smooth work processes.

Of course, for each user of the WebViewer, both the scope of the data and the period displayed can be preset as desired, so that only the data intended for the respective user is displayed. In addition, since all WebViewer web pages can only be opened with a valid user name and the corresponding password, there is no risk of data falling into unauthorized hands.

High output quality is also ensured, as all views are also provided as PDF files and can thus be downloaded and printed.

Compared to a completely web-based project management software, this results in the following advantages:

Creation and management of data in a familiar Windows environment (with all the usual functions, such as consistent mouse task, etc.).

Original data remains on internal company server.

Data is backed up in the internal network as before.

Only approved data is made available to WebViewer users.

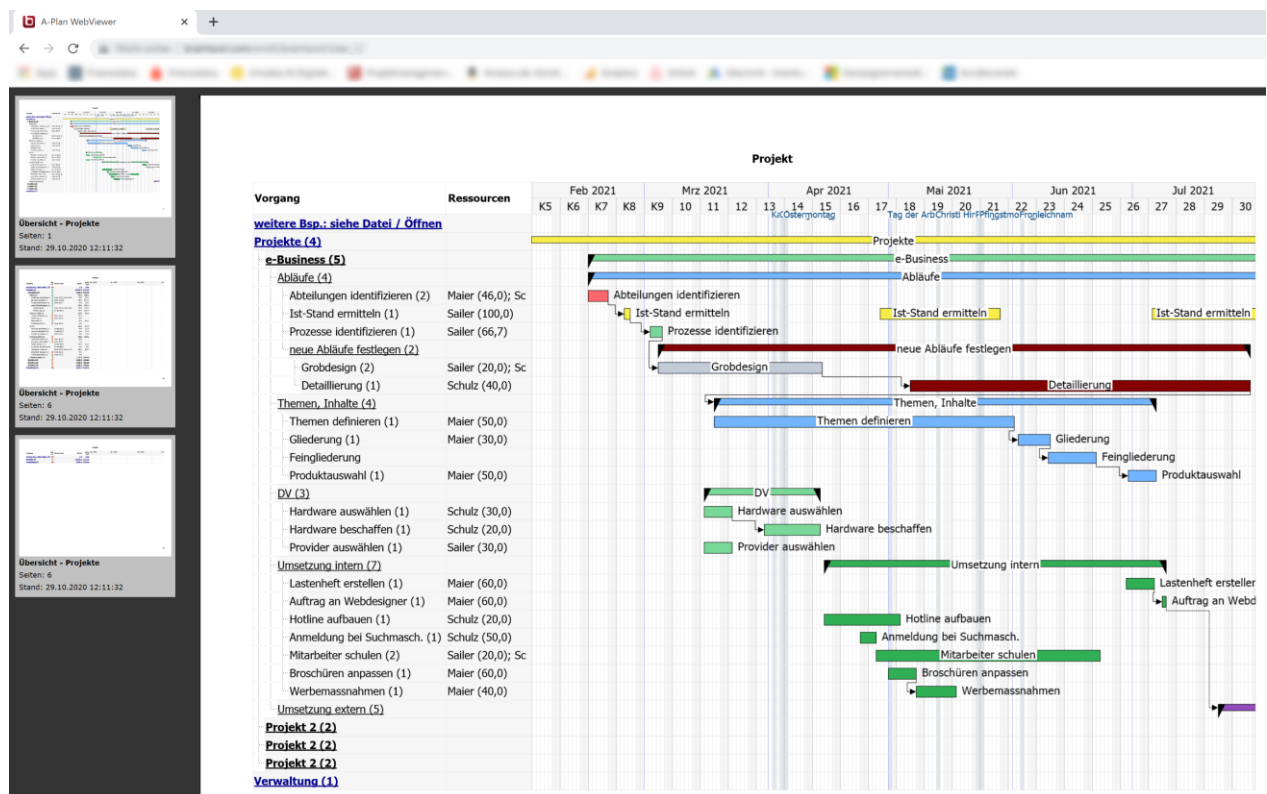
No installation on external devices required.

All device types and operating systems are supported.

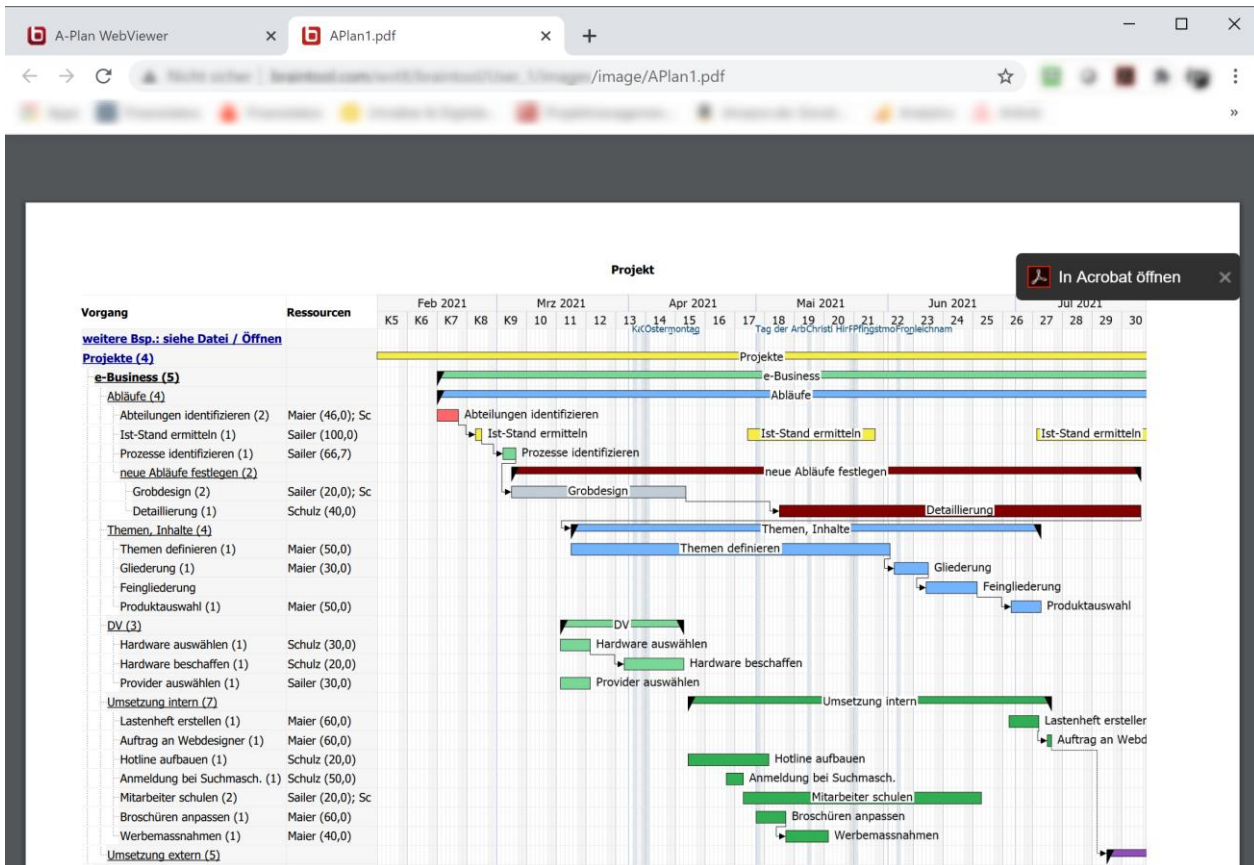
How does the WebViewer work?

A-Plan WebViewer has been designed to be as simple as possible and does not include any features (such as Flash Player, etc.) that may not be supported by certain devices or operating systems.

The pages of the WebViewer consist of normal graphics with a navigation bar on the left, which displays short texts and thumbnails of the first page for quick orientation:



By clicking on the graphics, they are displayed in PDF format and can then also be printed out in high quality if required:



The preparation of the views and the automatic updating of the web pages is performed by the **A-Plan WebCreator**. It is used to manage the users of the WebViewer and to make all settings for the views. In addition, the refresh interval for each user can be set here.

When using A-Plan with **multiple users**, **one license is required for the WebCreator** and **one license for each user of the WebViewer**.

For the **single-user version of A-Plan** there is an integrated solution, whose deviations from the multi-user use are described under "WebCreator - single user" on page 204 are described.

WEBCREATOR - MULTIUSER DEPLOYMENT

Administrator mode

Although the WebCreator can also be used by "regulare" A-Plan users (see "User mode" on page 203), but the following functions are only possible in administrator mode:

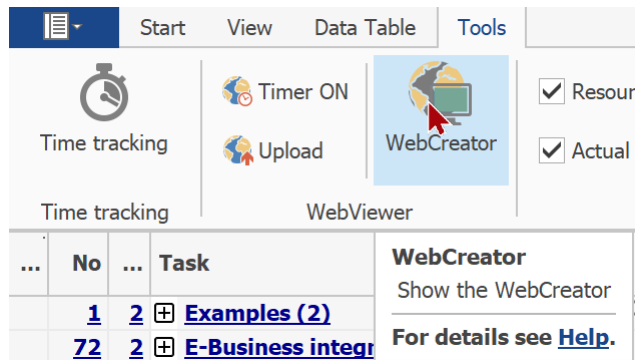
Specify the settings for file upload

Management of all users of the WebViewer

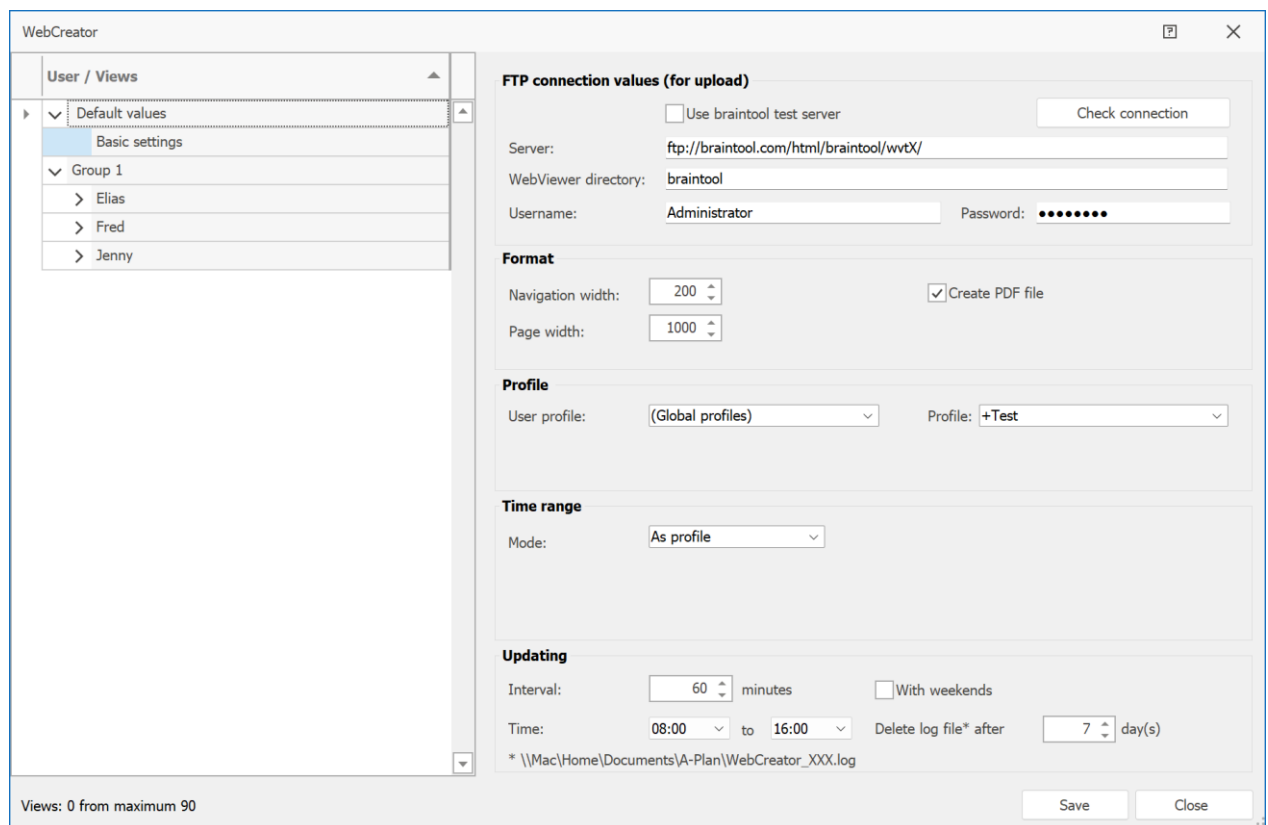
Timer controlled upload of views

The WebCreator is available in administrator mode when A-Plan is opened with the user name "webadmin". It has, like the user "admin" (see User "admin" and "webadmin" on page 148), administrator rights, but unlike the "admin" he can see (but not change) all data.

The WebCreator is called in the **Tools** command group:



Basic settings



FTP connection data for upload

The views for the WebViewer can be uploaded either on a special server of braintool software or - if available -, on any other web server.

The FTP connection data required for this (FTP = File Transfer Protocol) are set in the upper part of the dialog window.

Own web server

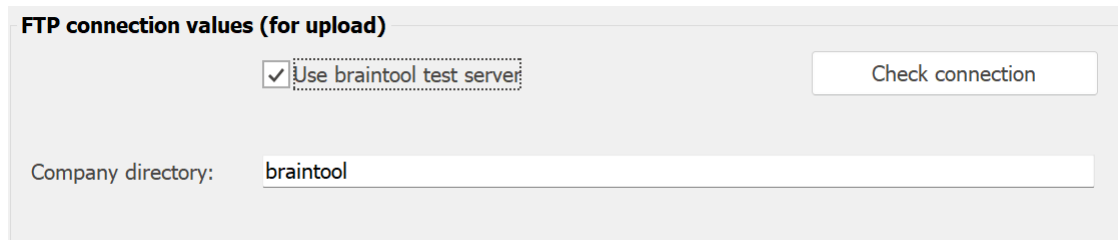
If you have your **own web server**, you can use it with the test version of the WebViewer as well as with the licensed version. In this case, deactivate the option **Use braintool test server** and enter the URL of your server in **Server**.

The directory in which the user subdirectories of the WebViewer are to be created is specified in the **WebViewer directory** field. It can also be further subdivided, such as "planning/area1/aplan" or omitted if the user directories are to be created directly in the root directory.

The other fields are used to record the connection data to your server, which you may request from your provider.

braintool test server

During the **30-day test phase of A-Plan**, the test server **wvt.braintool.com** can also be used by activating the option **Use braintool test server**:



FTP connection values (for upload)

☒ Use braintool test server Check connection

Company directory:

You can use any name for the **Company directory**.

Important: Please note that views uploaded to the test server are not stored permanently!

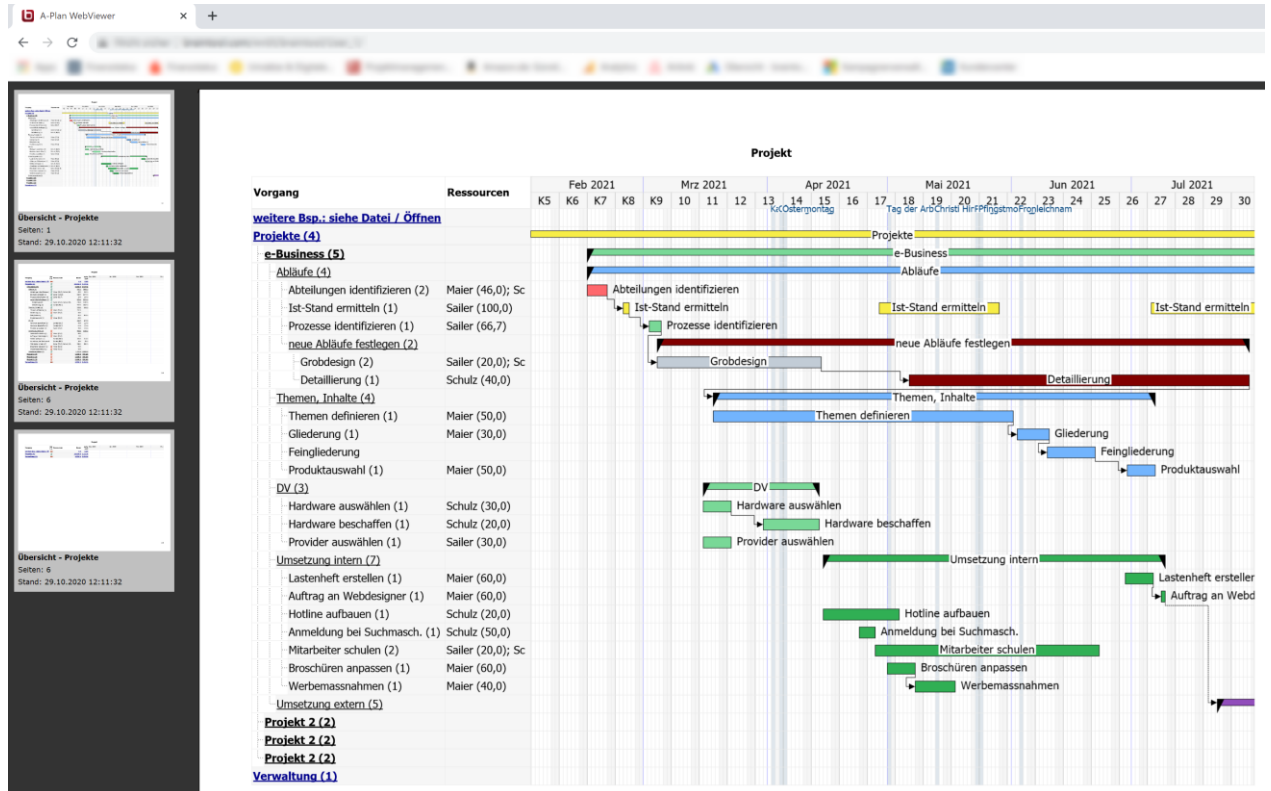
Braintool license server

With the licensed version of the WebViewer, the braintool server **webviewer.braintool.com** can be used for a fee (see [Version overview of Project Management Software A-Plan \(braintool.com\)](#)). The name of the subdirectory is set by braintool software in agreement with the respective customer. Of course, this directory is protected against unauthorized access!

So that all settings do not have to be made individually for each user, further basic settings can be made. The basic settings can then be modified for the individual users (see "User" on page 200).

Format

For each user, the WebViewer displays a navigation bar on the left and the selected image on the right:



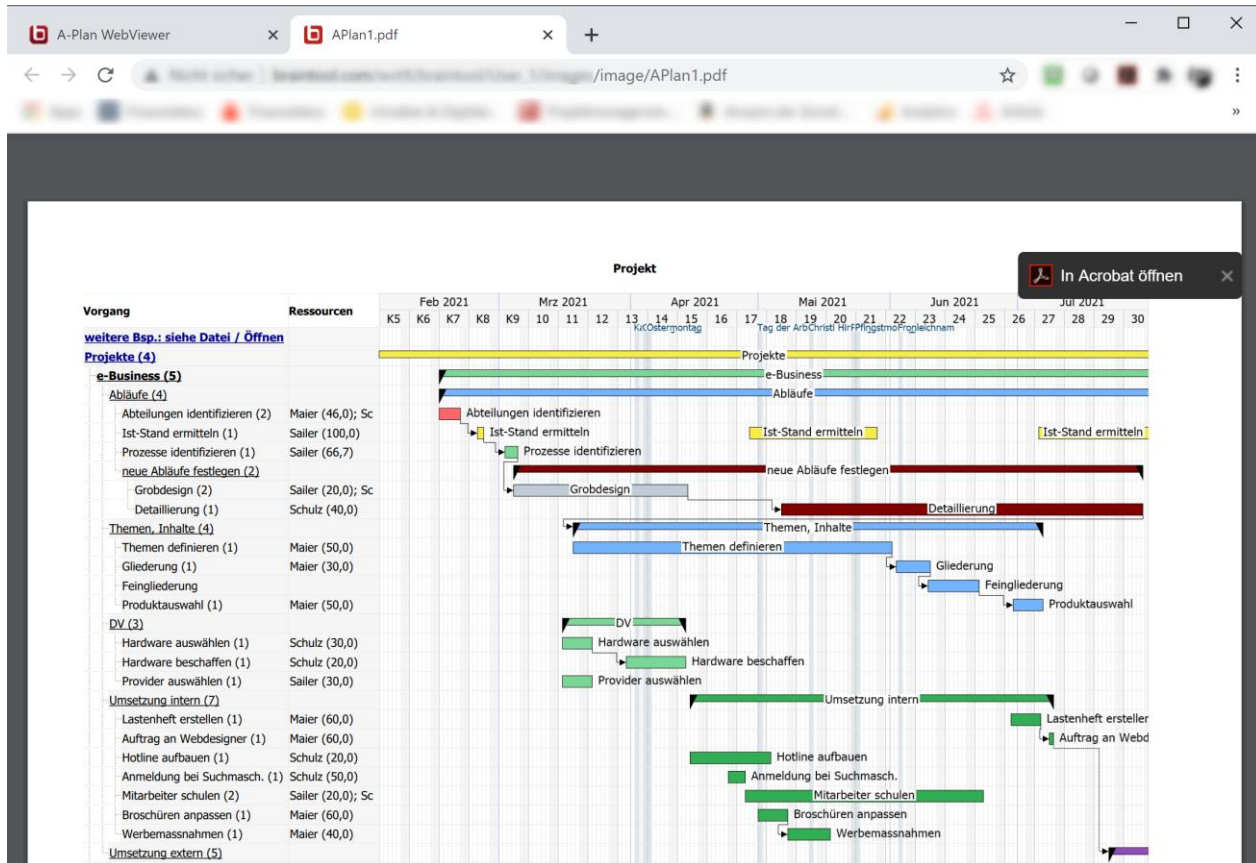
The width of these two areas can be set under **Format**:

Format

Navigation width:
☒ Create PDF file

Page width:

If the **Create PDF file** selection is activated, the WebViewer displays the views as PDF files in a separate window when they are clicked:



Since uploading the data takes some time depending on the available speed of the Internet access, you should not select the resolution too high and activate the creation of PDF files only when they are actually needed.

Profile, time span

As a basis for creating views, WebCreator uses existing profiles (see "Working with profiles" on page 128), but these can be modified in terms of the time span to be displayed and the filter settings (see below):

Time range

Mode: Shift:

Start: Time range:

End:

In the basic settings, only global profiles (see "

Profile:

Save settings

Manage Profiles

New Profile:

Delete current profile

Spec. profile

With the menu item **Manage Profiles** new profiles can be created or the current one can be deleted.

Global profiles" on page 129) can be selected, for the individual users additionally also individual profiles.

Selecting the time range ensures that the regular updates of the views (see next section) always display the required range, e.g. start of the current week to the end of the next week.

The **Mode** selection list sets the basis for the calculation of the current time period in each case:

As profile (accept setting unchanged from selected profile)

Automatically (select time span so that all time bars are mapped)

Fixed date (set the beginning of the time period manually)

Today (start of time span = current day)

Current week (start of the time span = start of the current week)

Current month (start of the time span = start of the current month)

Current quarter (start of time span = start of current quarter)

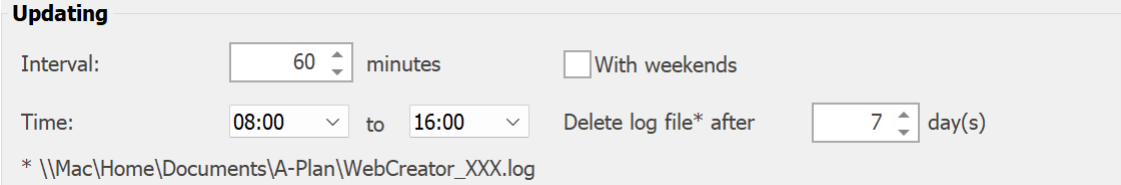
Current year (start of the time span = start of the current year)

Shift can be used to shift the time span by a fixed amount into the past or future. E.g. with **mode 'Current week'** and **Shift = - 1 week** the time span starts on Monday of the respective previous week.

The value at **Time range** defines the length of the time range to be printed.

Update / Log file

The interval at which the views of the WebViewer are updated can be freely selected, as well as the earliest and latest time at which the update should take place and whether updates should also take place on weekends:



During creation and upload a log is made, which is stored in the respective Documents\A-Plan directory. To prevent the number of log files from growing indefinitely, the retention time can be specified.

If relatively short time intervals are selected for a larger number of users, it may not be possible to adhere to the times, depending on the volume of data to be uploaded and the speed of the Internet connection. In this case, a queue is formed so that even then all users are always taken into account.

Changes to the settings are automatically saved when you switch to another tab and close the WebCreator, as well as when you click the **Save** button.

User

For all users who have been activated for the WebViewer (see "User management" on page 203), a tab is available in which all individual settings can be made:

The screenshot shows the 'WebCreator' application window. On the left is a sidebar with a tree view under 'User / Views'. The tree includes 'Default values' (with sub-items 'Basic settings' and 'Group 1'), 'Group 1', 'Elias' (selected), 'Default settings (new view)', 'Fred', and 'Jenny'. The main area is titled 'Personal credentials for WebViewer' and contains several sections: 'User directory' with a text field containing 'Elias'; 'Format' with 'Navigation width' (200), 'Page width' (1000), and a checked 'Create PDF file' checkbox; 'Profile' with 'User profile' set to '(Global profiles)', a 'Profile' dropdown set to '+Test', and a 'Replace filter settings' checkbox; 'Time range' with 'Mode' set to 'Current month', 'Start' (21.04.2022), 'End' (28.04.2022), 'Shift' (0 Day(s)), and 'Time range' (7 Day(s)); and 'Updating' with 'Interval' (60 minutes), 'With weekends' unchecked, 'Time' (08:00 to 16:00), and 'Delete log file* after' (7 day(s)). At the bottom, there are buttons for 'Preview all views of the user', 'Upload user views', 'Apply basic setting', 'Save' (highlighted with a red arrow), and 'Close'. A status bar at the bottom left says 'Views: 0 from maximum 90'.

However, users of the WebViewer who also have a normal A-Plan license can also configure their settings themselves (see "User mode" on page 203).

In the field **User directory** an individual user directory must be specified, which is created one level below the directory entered in the default values (is displayed there in the field **WebViewer directory**). **Username** and **password** can be chosen arbitrarily when using a **braintool server** and are required to access the WebViewer with an internet browser. If you use your **own server**, you have to define username and password directly on your server.

All other basic settings are taken from the **Default values** tab.

The meaning of the settings is therefore also identical to those of the **Basic setting** tab (see previous section). However, the values can be adjusted individually.

In the **User profile** selection field, any user can be specified whose profiles are to be made available in the **Profile** list. Since the WebCreator does not modify profiles, profiles of other users can be set without the risk of conflicts.

By clicking the **Preview all views of the user** button, the views of the current user are generated and displayed in the default Internet browser. In order to display the preview as quickly as possible, the views are generated locally in this case and not uploaded to the set web server.

Views

For users, the settings for the views are displayed below the basic settings:

The screenshot shows the 'WebCreator' application window with the 'User / Views' settings. The left sidebar displays a hierarchical tree of settings, with 'View 1' selected. The main content area is divided into sections: 'Description' with a text input field containing 'Current projects'; 'Profile' with dropdowns for 'User profile: Elias' and 'Profile: Default', and a 'Replace filter settings' button; and 'Time range' with dropdowns for 'Mode: Current week', 'Shift: 0 Day(s)', 'Start: 22.04.2022', 'End: 29.04.2022', and 'Time range: 7 Day(s)'. At the bottom, there are buttons for 'Preview current view of the user', 'Upload user views', 'Apply basic setting', 'Save', and 'Close'. A status bar at the bottom left indicates 'Views: 1 from maximum 90' and includes a 'Delete view' button.

The views can be provided with a **Description** so that they can be identified in the navigation bar of the WebViewer.

Different from the basic user settings, a different **Profile** and **Time range** can also be set for each view.

In addition, it is possible to replace the **filter settings** of the selected profile with special settings for the respective view. After clicking the **Replace filter settings** button, the same dialog window appears as described under "Dialog filter" on page 74 is displayed. However, the new settings do not overwrite the original settings of the selected profile, but are saved separately together with all other settings for the WebCreator.

The settings can be made either centrally by the "webadmin" user or by the users themselves who have been enabled for the WebViewer (see "User mode" on page 203).

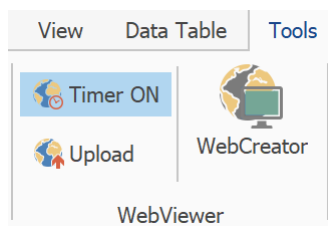
Create new view

Overwriting (**new view**) and pressing the ENTER key creates a new view.

The **maximum possible number of views** depends on the number of licenses. By default, 3 views are possible per user, but they can be distributed among all users as desired. Therefore, with 2 licenses, for example, one user can use 2 views and the second 4 views.

Uploading the views to the web server

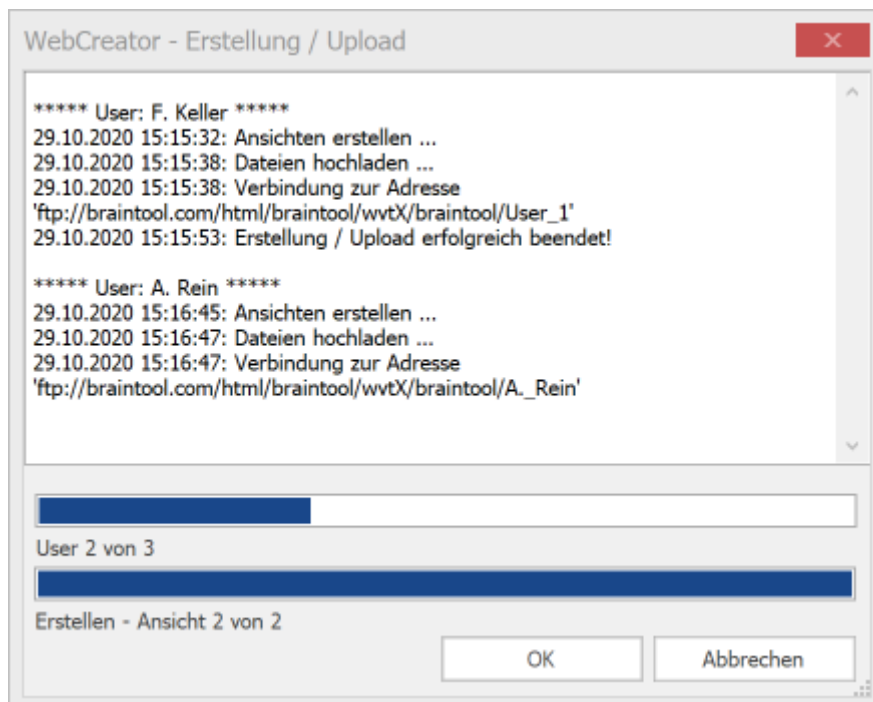
When the **timer is enabled**, the views are **automatically uploaded** according to the intervals set for the users:



Important: In the case of multi-user use, the timer-controlled upload only takes place if the login was made with the user **webadmin!**

Manual uploading is possible through the **Upload** buttons in the **Tools** tab or **Upload Views** in the WebCreator dialog box.

During the upload, a dialog box with the progress is displayed:



Additionally, in the local A-Plan directory (by default "Documents\A-Plan"), a log file called **WebCreator_xxx.log** is created, which logs all actions (xxx stands for the date + time).

The time required for uploading depends solely on the speed of your Internet access. Therefore, if you have a slower Internet connection, you should not set the resolution of the views too high and only activate the creation of PDF files if they are actually needed (see "Views " on page 201).

User management

When using the WebViewer, you can define who can use A-Plan and who can use the WebViewer within the existing licenses in the user management of A-Plan (**Tools** tab) (see "WebViewer (optional)" on page 192).

The users enabled for the WebViewer are listed in the WebCreator for configuring the views, etc. The maximum number of views that can be set in the WebCreator (see "Views " on page 201) is equal to 3 times the number of licenses for the WebViewer, regardless of how many users are actually enabled in the user management.

User mode

Users who are activated for both A-Plan and WebViewer can also call up WebCreator under **Tools**, but then the basic settings cannot be changed and only the logged-in user is displayed in the list of WebViewer users, so that changes to the settings and manual uploading of views is only possible for them.

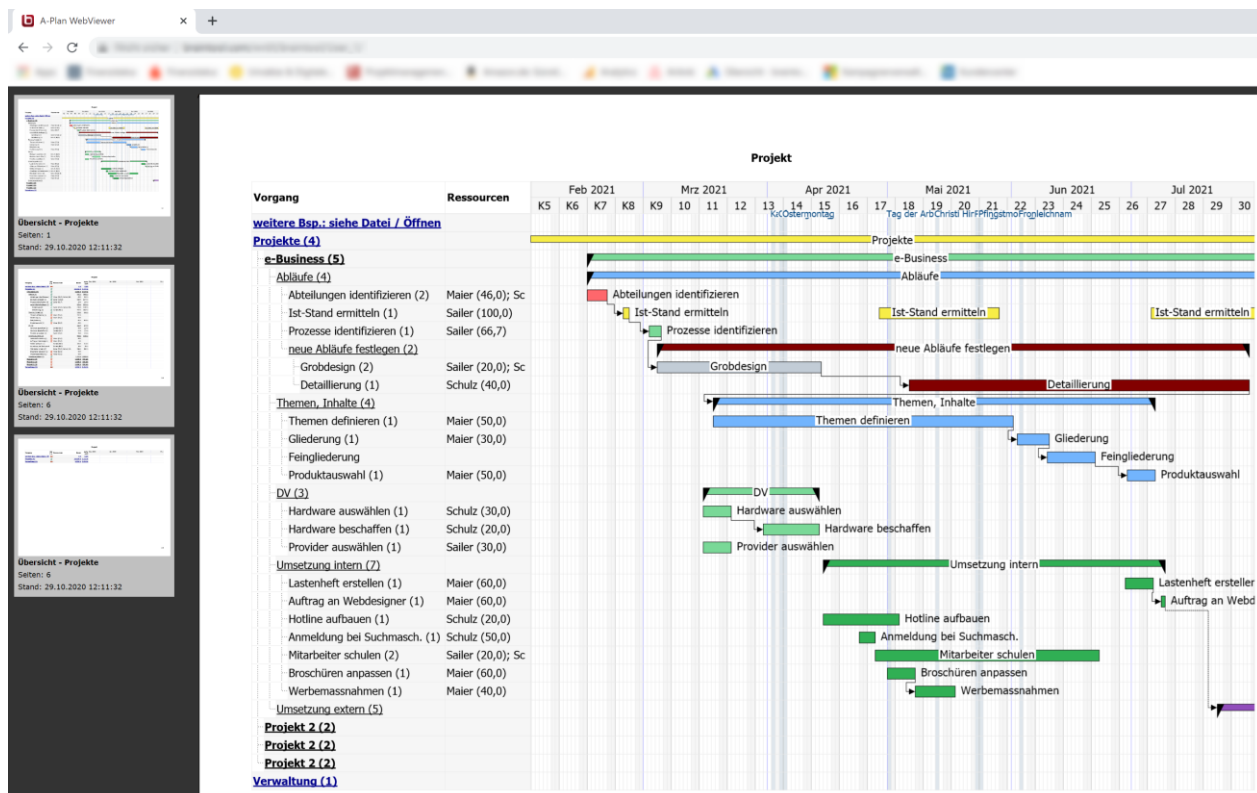
The timer-controlled upload is also not possible because A-Plan is blocked during the upload and therefore the WebCreator license is available for this purpose (see "Uploading the views to the web server" on page 202).

WEBVIEWER

The WebViewer requires only any browser and Internet access. Also, neither a specific device, nor operating system, nor special components are necessary (such as a Flash Player), since the WebViewer consists of simple HTML pages.

The WebViewer is launched at the Internet address specified in the WebCreator (see "User" on page 200). In addition, the user name and password also defined in the WebCreator must be entered.

By clicking on the reduced representations in the left navigation bar, the desired views can be selected:



The PDF file is displayed in a separate window when one of the views is clicked.

WEBCREATOR - SINGLE USER

With a single-user version of A-Plan, the WebCreator is included if licensed accordingly and therefore does not need to be activated by the "webadmin" user.

When calling the WebCreator, only the main tabs **Default values** and **Views** are available in this case.

However, the settings and handling are basically the same as for a multi-user license (see "WebCreator - MultiUser deployment" on page 194), except that multiple users cannot be managed and no settings have to be made in A-Plan's user administration.

TIME TRACKING (OPTIONAL)

INTRODUCTION

The time tracking module for A-Plan, which can be activated as an option, can be used to record and display in detail the time spent processing tasks and thus also the costs. The actual effort can either be entered in a special dialog window in A-Plan or transferred from other programs via a universal interface.

This results in the following possibilities:

Allocation of the actual expenses and costs incurred to the tasks

Documentation of incurred times and costs for client and contractor

Comparison of planned values and actual values

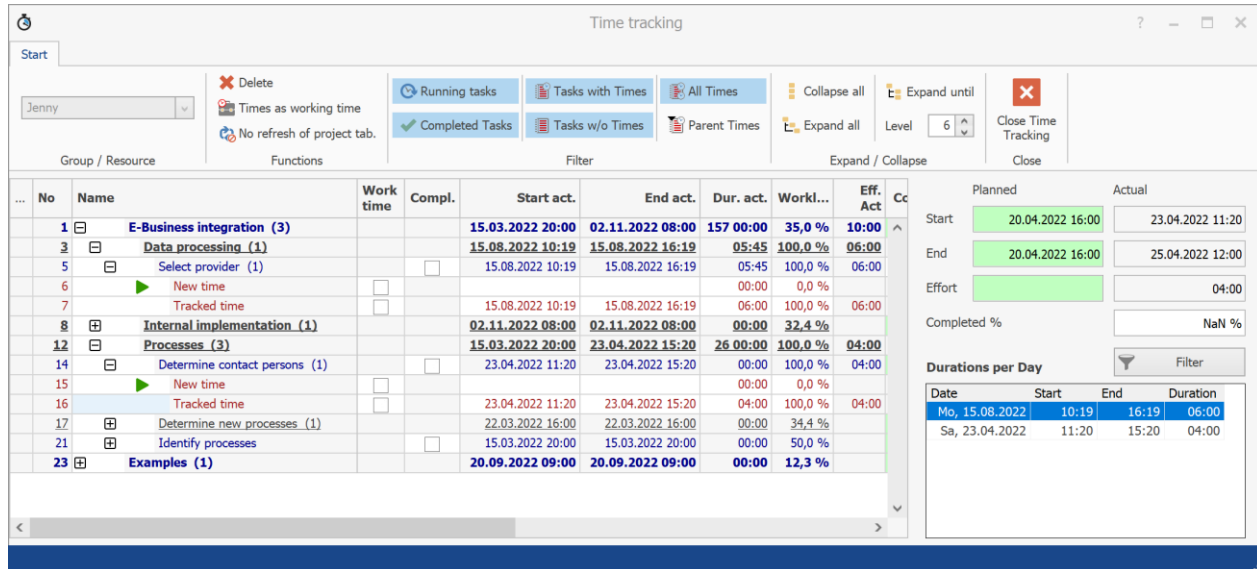
Display of the capacity curve over the time axis

Preparation of forecasts on the further course of the project and on the expected costs

TIME TRACKING WITH A-PLAN

Opening and structure of the time tracking

Time tracking is opened by clicking **Time tracking** in the **Tools** tab:



Main table

In the left table of the time tracking all **tasks** are displayed to which the **user logged in to A-Plan** is assigned as a resource.

If the **login name is different from the resource name**, times can also be entered if the relationship between login name and resource has been noted accordingly (see "Group / Resource" on on page 209).

The columns have the following meaning:

Designation	Content
Name	Structure tree of the tasks to which the logged-in user is assigned.
Work time	<p>Calculation mode for the duration of the entered time. Without activated real time the duration is determined by the difference of start and end, in case of working time the non-working times deposited with A-Plan (incl. weekends, holidays, absences etc.) are taken into account.</p> <p>So, for example, if for the start Friday, 14:00 h, and for the end Monday, 10:00 h, was entered, the duration is with real time = 10 h + 2 x 24 h + 10 h = 68 h. But for working time only 2 h + 2 h = 4 h, if Friday is worked until 16:00, the weekend is free and Monday is started at 08:00!</p>
Compl.	Task is completed, no more times can be entered. However, times of

	completed tasks can be changed or deleted again if the check mark in the Compl. column has been removed.
Start act.	Start of the entered time. In the parent rows, the earliest start of all child rows.
End act.	End of the entered time. In the parent rows, the latest end of all child rows.
Dur. act.	Duration of the entered time. In the case of the entered data, it is taken into account whether working time is activated or not; in the case of the tasks, the calculation of the duration is generally carried out in working time!
Workload	Workload of the resource by processing the task. For example, if the task was processed with only 50% of the available capacity, the actual effort expended is only half the duration .
Eff. act.	Hours worked taking into account the workload. E.g. a duration of 8 hours at a workload rate of 25% results in only 2 hours in terms of effort. The effort displayed for the tasks or higher levels always refers to the effort of the currently selected resource. This means that if a task is processed by several resources, the total effort can also be higher.
Completed	Completion percentage. If the scope of completion matches the ratio of hours worked to hours planned (e.g. 50% for 5 hours worked and 10 hours planned), the background is displayed in green; if there is a discrepancy, it is displayed in white. For uncompleted tasks, the completion level is limited to max. 99%. Completed tasks are automatically set to 100%.
Note	Any length of text.
Eff. act/pld	Calculated ratio between the hours worked (taking into account the workload) and the planned hours. In contrast to the scope of completion, the ratio is more than 100% if the hours worked are greater than the planned hours.

Columns that **are not currently needed** can be "dragged" into the then displayed list of all columns after clicking a column title with the right mouse button (analogous to the procedure of the main table of A-Plan).

The **order of the columns** can be adjusted by "dragging and dropping" the column titles, and the **width can be** adjusted by "dragging" the boundary lines.

All settings, including the filters etc. explained further below, are saved so that they are available again the next time you open the program.

Info area, list of recorded times

On the right side of the time tracking, information about the recorded times is displayed.

	Planned	Actual
Start	20.09.2022 09:00	20.09.2022 09:00
End	10.04.2026 00:00	05.01.2023 09:00
Effort	849:29	00:00
Completed %		0,0 %

Durations per Day
Filter

Date	Start	End	Duration
Mo, 15.08.2022	10:19	16:19	06:00
Sa, 23.04.2022	11:20	15:20	04:00

In the upper part of the info area, the planned and the current actual values are displayed for the currently selected row of the main table.

In the lower part, the sum of times recorded so far for each calendar day.

If one or more days (expand with Ctrl key pressed) are marked in the list of daily totals and **Filters** are clicked, only the times recorded on the marked days are displayed in the main table, so that they can be checked and corrected or deleted if necessary:

Name	Work time	Compl.	Start act.	End act.	Dur. act.	W
E-Business integration (3)			15.03.2022 20:00	02.11.2022 08:00	157 00:00	
Data processing (1)			15.08.2022 10:19	15.08.2022 16:19	05:45	
Select provider (1)		<input type="checkbox"/>	15.08.2022 10:19	15.08.2022 16:19	05:45	
Tracked time	<input type="checkbox"/>		15.08.2022 10:19	15.08.2022 16:19	06:00	

	Planned	Actual
Start		
End		
Effort		
Completed %		0,0 %

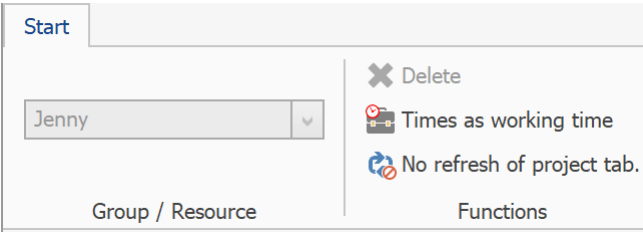
Durations per Day
Filter

Date	Start	End	Duration
Mo, 15.08.2022	10:19	16:19	06:00
Sa, 23.04.2022	11:20	15:20	04:00

By clicking on **Filter**, all times are displayed again in the main table.

Menu bar

Group / Resource



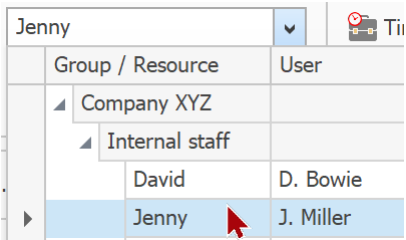
User without master authorization for the opened database (see "'Master' authorization (A-Plan)" on page 186) can only enter their own times, therefore no other resource can be selected in the resource list in these cases.

Resource/Task	Text10	Nt.
<input type="checkbox"/> Company XYZ (2)		
<input type="checkbox"/> Internal staff (3)		
<input checked="" type="checkbox"/> Jenny (6)	<J. Miller>	
<input checked="" type="checkbox"/> David (8)		<D. Bowie>

If names of resources do not match the respective login name, the login name can be stored in the resource view of the main window of A-Plan, alternatively in the **Note** or in the user-defined column **Text10**.

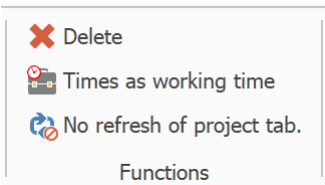
For this purpose, the login names must be enclosed in angle brackets, which makes it possible to insert them anywhere in the **Note** as well as in the **Text10** field.

In the example shown, the user with the login name "J. Miller" could then enter times for the resource "Jenny".



If the master right is available, any resources can be selected from the list for entering actual times.

Functions



In the **Functions** block, entered times can be deleted.

If the entries are generally to be made in **working time**, activate the corresponding button.

In the subsequent entries, the **working time** column (see "Main table" on page 206) will automatically be checked.

Since the updating of the data in the main table of A-Plan can cause short delays after the input of new actual times, especially in large databases, this action can be switched off in the functions.

The update is then performed after closing the time tracking.

Filter





Extensive options are available for selecting the data to be displayed.


Note:


All the settings shown below are saved when the time tracking is closed and are thus active again when it is reopened.


Open/Close

Analogous to the procedure for the main table of A-Plan, the individual projects or headings can be opened or closed by mouse click:

Name	Work time	Compl.	Start act.	End act.
 E-Business integration (3)			15.03.2022 20:00	02.11.2022 08:00
 Data processing (1)			15.08.2022 10:19	15.08.2022 16:19
 Select provider (1)		<input type="checkbox"/>	15.08.2022 10:19	15.08.2022 16:19
 New time	<input type="checkbox"/>			
Tracked time	<input type="checkbox"/>		15.08.2022 10:19	15.08.2022 16:19

 Collapse all

 Expand until

 Expand all


Level


Expand / Collapse


If all rows are to be completely closed, completely opened or opened to a certain level, this can be done by clicking the corresponding icon buttons in the Ribbon.


Ongoing/Completed Tasks


Running or completed tasks (grayed out) can be displayed or hidden independently of each other:


 Running tasks

 Tasks with Times

 All Times

 Completed Tasks


 Tasks w/o Times


 Parent Times


Filter


Tasks with and without times


The same applies to tasks for which times have already been recorded and those for which times have not yet been recorded:


 Running tasks

 Tasks with Times

 All Times

 Completed Tasks

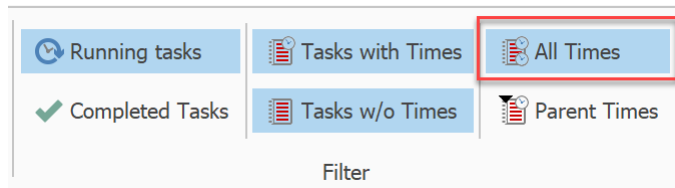
 Tasks w/o Times

 Parent Times

Filter

All times

By default, only the last recorded time is always displayed for the tasks, so that the table is clearer. Optionally, however, all times can also be displayed:



Parent times

Times can also be entered at higher levels if the button **Parent Times** has been activated:

A screenshot of the main table interface. At the top, there's a 'Group / Resource' dropdown set to 'Jenny', a 'Functions' section with 'Delete', 'Times as working time', and 'No refresh of project tab.', and a filter menu with 'Parent Times' selected (highlighted with a red box). Below is a table with columns: No, Name, Work time, Compl., Start act., End act., and D. The table shows tasks like 'E-Business integration (3)' and 'Data processing (1)'. Red arrows point from the 'Parent Times' button to the 'Start act.' and 'End act.' columns.

No	Name	Work time	Compl.	Start act.	End act.	D
1	E-Business integration (3)			15.03.2022 20:00	02.11.2022 08:00	Start
2	New time					End
3	Data processing (1)			15.08.2022 10:19	15.08.2022 16:19	Effort
4	New time					Comp
5	Select provider (1)			15.08.2022 10:19	15.08.2022 16:19	
6	New time					
7	Tracked time			15.08.2022 10:19	15.08.2022 16:19	

Enter times

Timer

A screenshot of the timer interface. It shows a task 'Select provider (3)' with a green arrow button labeled 'Start timer' and a red square button labeled 'Stop timer'. Below, it shows 'Tracked time' entries with timestamps.

Task	Start time	Stop time
Select provider (3)	23.04.2022 15:02	
New time		
Tracked time	15.08.2022 10:19	
Tracked time	23.04.2022 15:04	

The easiest way to record times is by using the **timer**, which is started by clicking the green arrow in the **Name** column and stopped by clicking the red square in the same column.

Times recorded with the timer are always recorded in **real time** (for explanation see "Main table" on page 206).

Manual input

All values in the table that are highlighted in white or green can be **changed** or entered **directly** after **clicking on them**.

Hint:

In the **Duration** column, any format can be used that can be interpreted as duration, e.g.

"2h" or "2:00" for 2 hours or "2 3:05" or "2t 3h 5m" for 2 days, 3 hours and 5 minutes. However, regardless of this, the display is always in days, hours, minutes in the format dd hh:mm.

Entering the duration without start or end

If the times of the current day are to be entered as a **lump sum**, i.e. without a concrete start / end, it is sufficient to enter the time spent in the **Duration** column. A-Plan then sets 6:00 o'clock of the current day for the start and calculates the end according to the entered time.

Overlapping times

If times are entered that overlap, the rows in question are displayed in orange and the corresponding row is displayed in parentheses:

<input type="checkbox"/>	Select provider (2)	<input type="checkbox"/>	<input type="checkbox"/>	23.04.2022 15:02	15.08.2022 16:19
<input type="checkbox"/>	New time	<input type="checkbox"/>			
	Tracked time	<input type="checkbox"/>		15.08.2022 10:19	15.08.2022 16:19
	Tracked time (like no. 17!)	<input type="checkbox"/>		23.04.2022 15:02	23.04.2022 15:02
<input type="checkbox"/>	Internal implementation (1)			02.11.2022 08:00	02.11.2022 08:00
<input type="checkbox"/>	Processes (3)			15.03.2022 20:00	23.04.2022 15:20
<input type="checkbox"/>	New time	<input type="checkbox"/>			
<input type="checkbox"/>	Determine contact persons (1)	<input type="checkbox"/>	<input type="checkbox"/>	23.04.2022 11:20	23.04.2022 15:20
<input type="checkbox"/>	New time	<input type="checkbox"/>			
	Tracked time (like no. 8!)	<input type="checkbox"/>		23.04.2022 11:20	23.04.2022 15:20

Completed, Completed %

In the **Completed %** field, A-Plan automatically enters the scope of completion that results from the ratio of planned to previously performed effort.

If this does not correspond to the actual status (e.g. if 15 Ah of the planned 16 Ah have already been used, but only 75% of the processing scope has been completed), this value can be changed manually. After a manual change, the field will be displayed with a **white** background instead of a **green one**. The predicted effort (**Eff. forec.**) is adjusted accordingly.

Conversely, the forecast expense can also be changed if it is foreseeable that the planned expense will probably be under- or exceeded. In this case, **Completed %** is then adjusted.

When the displayed task is completed, the status of the task can be set to completed by placing a check mark in the **Compl.** column, which sets the completion level to **100%** and no more times can be entered.

If times are subsequently entered or deleted, the check mark must be removed again.

Parent times (distribution of times to several tasks)

Times can not only be assigned to a single task, but can also be distributed to all tasks within a block as a "parent time". To do this, after activating the **Parent times** icon in the

Filter block, additional empty rows are displayed below all headings for entering these times:

No	Name	Work time	Compl.	Start act.	End act.	D
1	E-Business integration (3)			15.03.2022 20:00	02.11.2022 08:00	Start
2	New time					End
3	Data processing (1)			15.08.2022 10:19	15.08.2022 16:19	Effort
4	New time					Comp
5	Select provider (1)			15.08.2022 10:19	15.08.2022 16:19	
6	New time					
7	Tracked time			15.08.2022 10:19	15.08.2022 16:19	

Actual times that are booked under the headings by timer or by typing are distributed in the main table of A-Plan according to the planned effort to all tasks below the heading. Only tasks for which the logged-in user has been assigned as a resource are taken into account, i.e. those that are visible in the time tracking table.

Example: 10 hours are entered and below the heading there are two tasks with 20 and 30 planned hours. 4 hours are then booked on the first task and 6 hours on the second.

Notes

After clicking on the note column, a **note of any length** can be entered for the respective recorded times.

INTERFACE FOR IMPORT OF ACTUAL TIMES, ABSENCES

File format

Actual times and absences can be imported in the form of an **MS Excel file**.

The structure can be largely adapted to the available data.

For example, an MS Excel file may look like this:

	A	B	C	D	E	F	G	H	I	J	K
1	No	Date	Start	End	Duration	Completed %	Task-Ident-No	Resource-Index	Note	delete	read
2	1	19.01.2023	8:00:00 AM	4:00:00 PM	4h	30%			Remark 1		
3	2	28.01.2023	12:00:00 PM	3:00:00 PM	2h	50%			Remark 2		

Columns of the MS Excel file

A sample with all usable columns can be found in the program directory of A-Plan (by default "c:\ c:\Program Files\A-Plan X") with the name "ActualTimes0.xlsx".

Which columns are used and in which order is not important, but the names of the columns must correspond to those of the mentioned pattern.

No
1

The number column must always be present, since only rows that have a number in this column are read in.

There are several possibilities how to transfer the actual times to A-Plan. They are presented below as examples.

Transfer of actual time by start and duration

Start	Duration
23.06.2009 08:00	3,5 h

or

Date	Start	Duration
23.06.2009	08:00	3,5 h
	13:00	2,0 h

The duration can be passed in any format that can be interpreted as a time duration. It is then automatically converted to hours.

Examples for the transfer of **3.5 h**: "3.5 h" / "3.5h" / "3 hrs 30 min" / "3:30" / "210 min".

If several consecutive rows refer to the same day, only the 1st row in each case must contain the date.

Transfer of actual time by start and end

Start	End
23.06.2009 08:00	23.06.2009 11:30

or

Date	Start	End
23.06.2009	08:00	11:30
	13:00	15:00

Transfer of the actual time by week and duration on the weekdays

Date	Mo	Tue	Mi	Do	Fri	Sat	So
22.06.2009 08:00	5,0 h						
		3,5 h					
				4,0 h			

The date of the Monday of this week must be entered in the 1st row of the week in the **Date** column. The time entered for the **date is** used as the start.

Completed %	Workload %
30%	
	55%

In the **Completed %** column, the current completion level can be transferred, allowing A-Plan to generate a forecast for the expected end of the respective task (see chapter Target/actual comparison, forecast on page 103). If no value is given, A-Plan calculates the scope of completion based on the planned effort (e.g. planned = 10 h, actual = 5 h results in a scope of completion of 50%).

If the task in question was processed in the specified time with a capacity deviating from 100%, this can be entered in the **Workload %** column. The specified duration is then reduced accordingly.

Identification of the processed tasks

The actual times to be read in can be assigned either to individual tasks, all subordinate tasks of a heading, a complete project or a complete folder.

There are 3 different possibilities for the identification:

Task-Ident-No	Task-Index	Task-Name
V2436		
	173	
		Task 4711

It does not matter whether the identification is done using the task or resource row. In the first case, the correct resource row to which the time is assigned is determined with the help of the specified resource.

It is recommended to identify the respective task either by a unique ident number (column **Task-Ident-No** at A-Plan) or by the basically unique index (column **ID** at A-Plan), because in contrast to the designation, confusions due to different spellings, multiple occurrences etc. are less likely.

If the activity is a heading, i.e. if there are other tasks below the activity, the actual time is divided among the subordinate tasks. This is done in proportion to the planned effort in each case.

Identification of the resources

For the identification there are basically the same possibilities as for the tasks:

Resource-Ident-No	Resource-Index	Resource-Designation
R5634		
	2376	
		Miller, Jenny

If no resource identification has been specified in a row, the last existing one will be used. So, for example, if an Excel file is used for a single resource, it is enough to specify the identification once in the first row.

Note
Text of any length

Absence
Name of absence

If there is an entry in this column, the time span of this row will be interpreted as an absence during import. It will be entered in the row **Absences** at the named resource at A-Plan and the time bar will be provided with the name of the absence.

delete
x

If there is any text in the **delete** column, the time of this row, if it exists in the A-Plan database, will be deleted.

read
"ok" or error message (entry by A-Plan)

If this column is present, "ok" is entered when A-Plan imports successfully, and a corresponding error message is entered when errors occur (e.g. missing data, unidentifiable tasks or resources, invalid formats).

When importing the file again (e.g. after correcting detected errors), rows with "ok" are skipped. All other entries in this column will be ignored during import.

Settings

The settings for the automated import of actual times are located in the **Options** on the **Time tracking** tab:

Options

View

Gantt chart

Time bars

User settings

General settings

Colors Gantt chart

Messages / Orientation

Start behavior

Basic settings

Planning period

Costs / Abbreviations

Pattern individual

Pattern priority-dependent

Time tracking

Holidays

Master database / security / server directory

Time tracking

☐ Actual times may only be entered via time tracking

☐ Do not take over actual times of completed tasks from planned time, if no times have been entered yet

Actual times Import

Files

\\Server2\\A-Plan\\Data\\Times*.xlsx
\\Server3\\A-Plan\\Data\\Times*.xlsx

Check for new file each 60 min

☐ Cancel if error occurs

☒ Do not show messages during automatic import

☐ Do not delete overlapping times

User who should read in actual times

Elias, Fred

Files

Name of the import file(s) incl. path, where any number of rows can be created ("*" can be used as replacement character, e.g. "...\\Times*.xlsx" for "...\\Times1.xlsx", "...\\Times2.xlsx" etc.)

Check for new file each

Interval (in minutes) after which it is checked whether one or more files exist whose time stamp is newer than the time of the last import. With "0" no automatic import takes place.

Cancel if error occurs

If this option is enabled, further reading of actual times is aborted when an error occurs.

Do not show messages during automatic import

No messages are displayed on the screen during automatic reading. However, information can also be taken from the log file in this case (see Protocol file on page 219).

Do not delete overlapping times

Times that have already been read in once - i.e. same start, same end, same task and same resource - are generally deleted before being read in again, so that no duplicate times are created.

The same applies to overlapping times, so if, for example, 02/23/2022 8:00 am to 10:00 am already exists, this time will be deleted when a new one with the same date but 9:00 am to 11:00 am is imported. If this is not to take place, the deletion of overlapping times can be deactivated in the options.

Users who are to read in actual times

An automatic import only takes place if A-Plan is opened by a user selected in the list of options. Please note that only users who have been enabled for time tracking in the user administration are shown in the list!

Starting the import of actual times

The import is performed either regularly at the interval set in the options or by clicking on **Actual times Import** in the **Tools** tab.

Protocol file

In the directory ...\\Documents\\A-Plan a log of the import is created in a file in the format **Actual times import dd.mm.YYY hhmm.log** after each import:

Example of entries in the log file:

Import: \\Server2\\A-Plan\\Data_Actual_Times_Updated.xlsx - 18.12.2022 15:12:07

Error row 1: Resource is not assigned to the task!

Row 4: Workload > 100%!

imported times: 11

Deleted times: 13

Error: 1

Import: \\Server3a\\A-Plan\\Data_Times.xlsx - 18.12.2022 15:12:07

Row 1: Workload > 100%!

Row 1: Completion > 100%!

Error row 1: Task not found!

imported times: 15

Deleted times: 0

Error: 1

APPENDIX

A. PARAMETERS WHEN CALLING A-PLAN

Standard version of A-Plan

A-Plan can be invoked together with the following parameters:

<i>File name</i>	A-Plan is automatically opened with the specified file.
<i>/u:user:password</i>	All files are opened with the user name <i>user</i> and the password <i>password</i> (see "Logging in when calling a database " at page 158). If no password has been assigned, the 2nd colon must still be entered (e.g. "/u:miller:")

Enter the parameters as follows:

Click the A-Plan icon with the right mouse button. Then click on "Properties" and then on "Shortcut". In the "Target" field, enter the desired parameters after "...A-PlanX.exe".

Example:

...A-PlanX.exe f:\data\test.apl /u:miller:secret

SQL version of A-Plan

An SQL database can be called with the following parameters:

<i>Servename:database:MSSQL</i>	A-Plan will be opened with the specified database of a Microsoft SQL server.
<i>/u:user:password</i>	All files are opened with the user name <i>user</i> and the password <i>password</i> . If no password was assigned, the 2nd colon must be entered anyway (e.g. "/u:miller:")
<i>/a:\$winauth</i>	The connection to the MS SQL server is established with Windows authentication.

Enter the parameters as follows:

Click the A-Plan icon with the right mouse button. Then click on "Properties" and then on "Shortcut". In the "Target" field, enter the desired parameters after "...A-PlanX.exe".

Example:

...A-PlanX.exe 123.456.78.90:test:MSSQL /u:steven:secret

oder forecast

...A-PlanX.exe 123.456.78.90:test:MSSQL /a:\$winauth

B. QUESTIONS , PROBLEMS, ERRORS

You can find our forum at:

<https://braintool.com/a-plan-forum/>

The form for submitting a request:

[Support Enquiry \(braintool.com\)](#)

Bugfixed versions (patches) can be found at:

[Patches A-Plan X \(braintool.com\)](#)