



FastTrack Schedule 2026

Advanced Tutorials Manual

Track Schedule 2026 Advanced Tutorials Manual

Version 2026 (v12.0.0)

by AEC Software, Inc.

Kalvin K. Saccal

With <%PRODUCTNAME%>, the new version of the award-winning project manager, it's easier than ever to plan and manage your projects.

Powerful tracking tools and dynamic status reports keep team members in sync, costs under control, and projects on schedule.



FastTrack Schedule 2026 Advanced Tutorials Manual

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Prepared June, 2026 in Dulles, Virginia, USA



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Special thanks to:

All the people who contributed to this document, to all current and previous AEC Software family members who inspire and create great products, and to all partners and associates of AEC Software.

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1 Advanced Tutorials

Advanced Tutorials

These Advanced Tutorials will guide you through some of the more powerful features in FastTrack Schedule . If you are new to FastTrack Schedule and have not already reviewed the beginner Tutorials, we would recommend starting with those.

These Tutorials are constructed to be used with the FastTrack Schedule practice Tutorial files (FastTrack Schedule Tutorial Practice Files 6-11). Those practice files will be available to download at the beginning of each Tutorial module.

Important:

If you have trouble downloading and accessing the practice files, please call our Tech Support team for assistance: (703) 450-2318.

Table of Contents:

- » Advanced Tutorials 1: Using the Work Calendar
- » Advanced Tutorials 2: Filtering & Sorting
- » Advanced Tutorials 3: Using Summaries & Calculations
- » Advanced Tutorials 4: Working with Resources
- » Advanced Tutorials 5: Consolidating Files

2 Using the Tutorials

Using the Tutorials

Tutorials consist of a set of step-by-step instructions and sample schedule files that you can practice those steps on. At the beginning of each tutorial module you will download the corresponding practice file. You will then follow the steps in the tutorial in that file.

To begin a tutorial:

1. Open FastTrack Schedule.
2. On the Application tab, in the Help group, select Tutorials. The online Tutorials will open in a browser window.
3. Choose which tutorial you would like to use from the menu on the left.

To open the practice schedule file to be used while taking the tutorial, click the link at the beginning of the tutorial module to download the file and then open it.

To go through the tutorial:

Be sure you have both a FastTrack Schedule window (displaying the appropriate practice schedule) and your browser (displaying the appropriate step-by-step instructions) open at the

same time. If your monitor allows it, position the windows so you can work on the schedule while keeping the step-by-step instructions in view.

See also:

[Printing the tutorials](#)

[Tutorial Contents](#)

3 Printing the Tutorials

Printing the Tutorials

If you prefer to follow the instructions from a hard copy print out instead of on your screen, you can print the contents of the tutorials.

To print a tutorial:

1. Open the FastTrack Schedule 2026 Tutorials.pdf file, which was installed in the same location as the Tutorial practice files.

2. Print the FastTrack Schedule 2026 Tutorials.pdf file.

-or-

1. Open the Tutorials.

This will launch your computer's default browser.

2. Use your browser's Print functionality to print the active page.

This may mean clicking on the right side of the page to avoid printing the Contents frame.

You will have to print each tutorial one page at a time.

Important:

If you cannot locate the tutorial PDF file on your computer, Go to Search and search for "FastTrack Schedule 2026 Tutorials.pdf." If this produces no results, check with your System Administrator to make sure the Tutorial PDF file was included when FastTrack Schedule was installed on your computer.

Note:

The FastTrack Schedule 2026 Tutorials.pdf document is also available in the Downloads section of the AEC Software Homepage: <https://www.aecsoftware.com>

See also:

[Using the Tutorials](#)

[Tutorial Contents](#)

4 Advanced Tutorial 1: Using the Work Calendar

4.1 Using the Work Calendar - Intro

Advanced Tutorial 1 - Using the Work Calendar

This tutorial shows you how to use Work Calendars to define typical and non-typical, or exceptional, work days for the project as a whole and for a resource. You will also learn how to handle contradictions between the project and resource work calendars, to display the work schedule in the timeline graph, calculate durations in work units, and to drag activity bars according to the work schedule.

Click the link below to download the practice schedule file to be used while taking this tutorial:

[Download The "FastTrack Schedule Tutorial Practice File 1.fts" and Open It.](#)

Important:

If you have trouble downloading and accessing the practice file, please call our Tech Support team for assistance: (703) 450-2318.

4.2 Defining a Work Calendar

Defining a Work Calendar

In FastTrack Schedule there are three types of work calendars: project, activity, and resource. You assign just one calendar to the overall project, but any activity can be assigned a separate calendar and every resource can have its own work calendar. Each of these calendars is edited in the Work Calendar dialog and each of these calendars is completely customizable.

Work calendars allow you to define typical work days and exceptional days for the project, each resource, and any activity.

Work Calendars help you accurately track the amount of time available for work on tasks. Once Work Calendars have been defined, you can utilize them in several ways:

- To display the work schedule in the Schedule View timeline by hiding and/or shading non-work times.
- To help you schedule tasks during work times only.
- To calculate durations in work units.

There are four key elements of the Work Calendar: Base Work Days, the [selected] Calendar, Typical Days, and Specific Days.

This element:

Base Work Day

[Selected] Calendar

Does this:

Determines how durations of work days are calculated. This is only used in calculations. You set this number in the Project tab of the Document Preferences dialog.

Determines the calendar you assign to a project, activity or resource and from which you may build a custom calendar. Choose from: Standard - 8 hour work days Monday -Friday, 24 Hours - 24

hour work days seven days a week, Night Shift - a 40 hour work week from 11 PM - 8 AM, and any custom calendars you have created.

Typical Week Day

Allows you to set up a work schedule in which each day of the week might have different hours, for instance, a Monday might differ from other days.

Exceptions

Defines the specific days of the year that deviate from the base work day or typical days. Each specific day can have its own set of hours or no hours. For example, you might want to define holidays as specific days. Specific days are listed in the Exceptions table and can be given a descriptive name.

If you choose to calculate durations in 24-Hour Calendar units, the work calendar is no longer being used in the schedule.

In these steps, you will create a new work calendar, define February 16th, 2027 as a non-work day, and set this new calendar as the Project Work Calendar.

Steps:

1. From the Project menu, select Work Calendars.
The Work Calendars dialog opens.
2. Click the New button.
3. In the New Work Calendar dialog, be sure Standard (Project Calendar) is selected in the Copy Calendar option, and enter "Product Titan Launch".
4. Click OK to close the New Work Calendar dialog.
5. In the Define Specific Days area, select February as the month and 2027 as the year.
6. Select day 16 (February 16th) in the calendar.
7. Click the Clear Day button.
The Work Shift Details table will now contain no start time or finish time.
8. In the Description field of the Exceptions table, enter "Company Holiday" beside the date 2/27/27.

Calendar: Standard (Project Calendar)  New... Delete

Base Calendar: Standard (Project Calendar)  Copy Calendar Paste Calendar

Define Specific February  2027 

Sun	Mon	Tues	Wed	Thur	Fri	Sat
31	01	02	03	04	05	06
07	08	09	10	11	12	13
14	15	16 0.00	17	18	19	20
21	22	23	24	25	26	27
28	01	02	03	04	05	06
07	08	09	10	11	12	13

Define Default Work Days

Sun	Mon	Tues	Wed	Thur	Fri	Sat
0.00	8.00	8.00	8.00	8.00	8.00	0.00

Legend

	Default		Base Calendar Exception
	Non Working		Resource Exception

Exceptions:

Date	Description
02/16/2027	Company Holiday

Create Delete

Work Shift Details:

Start	Finish	Total

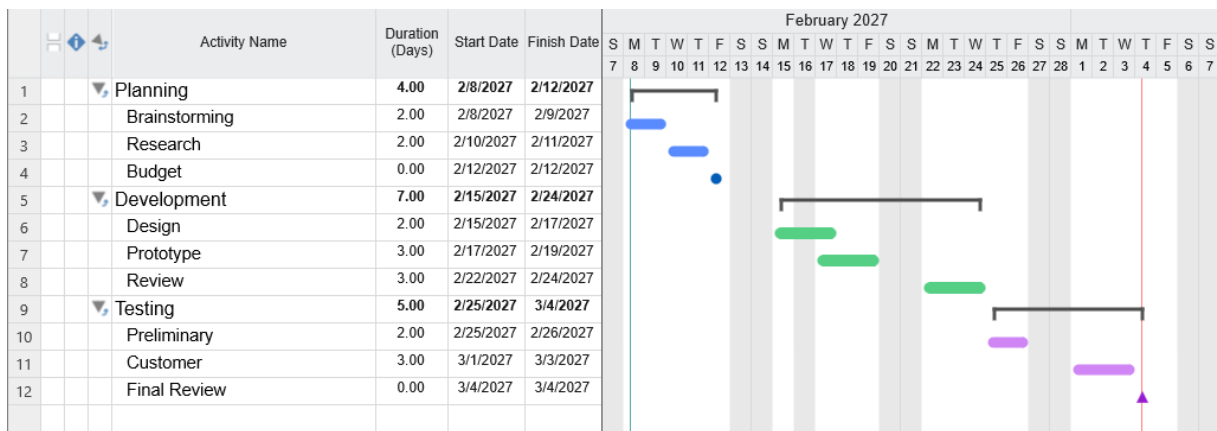
Create Delete

☐ Use default work day shifts on base calendar

Copy Day Paste Day Clear Day

? Cancel OK

9. Click OK to apply your changes and close the Work Calendars dialog.
10. From the Project menu, select Project Information.
The Project Information dialog opens.
11. From the Calendar drop-down list select Product Titan Launch.
12. Click OK to close the Project Information dialog and save your changes.



Note that February 16th is now shaded as a non-work day in the timeline (along with your weekends). Our Design task overlaps the non-work day, but no work occurs that day. There is a day of work on either side of the non-work day.

Clicking a day in the calendar or Typical Week Day area displays the work hours defined for that day in the Work Shift Details table. Here you cleared all of the work hours to make 2/16/27 a non-work day. You could, however, define new work hours by entering up to eight shifts, or "periods," of work time. Each period must be a continuous period of time.

In addition to defining the work schedule of specific days (as above), you can also define the work schedule for typical days of the week. This allows you to define a different work schedule for each day of the week. All work occurring on that day of the week will follow that new calendar.

4.3 Displaying the Project Work Calendar

Displaying the Project Work Calendar

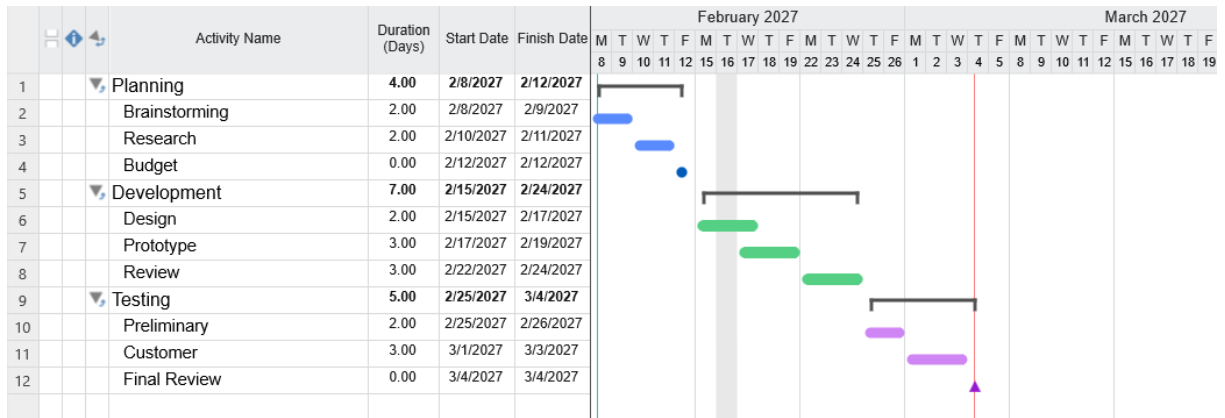
The appearance of the Project Work Calendar in the timeline graph is defined in the Display tab of the Format Schedule View dialog.

By default, timeline graph shades all days that have no work defined in the project work calendar. In addition to the typical Sundays and Saturdays, the specific day that you changed, February 16, 2027, is also shaded.

We will now change the setting from shading continuous non-work days to hiding them.

Steps:

1. From the Format menu, select View.
The Format Schedule View dialog opens in the Display tab.
2. In the Timeline Columns Display area, select the Hide Continuous Non-Working Days option.
3. Click OK to apply your changes and close the Format Schedule View dialog.



The timeline graph now hides all typical non-work days that are continuous. The weekend days are now hidden in this file.

All other specific non-work days, including February 16th, 2027, are shaded and showing when you select this option. Those non-continuous non-work days will not be hidden. If every Friday was deemed a non-work day in our Product Titan Launch work calendar, for example, then all Fridays would be hidden also because they are continuous with the weekends.

4.4 Creating a Task Specific Work Calendar

Creating a Task Specific Work Calendar

Any activity in your schedule can be assigned its own task work calendar that will operate independently over the overall project work calendar.

You will now create a new work calendar for the activity "Prototype". Currently this activity has a Start Date and Time of 2/17/2027 at 8:00 AM and a Finish Date and Time of 2/19/2027 at 5:00 PM.

Steps:

1. In Row 7, double-click the bar for the activity Prototype.
The Information form for that activity opens.
2. In the Calendar area of the Prototype Information Form, click the New button.
3. In the Calendar Name option, enter "Titan Prototype".
4. From the Copy Calendar drop-down list, choose 24 Hours.

Information

Row ID 7 - Task Information: Prototype

Row Bars

Bar ID 5

Duration: 3.00

Scheduled

Actual

Baseline 02/17/2027 8:00 AM 02/19/2027 5:00 PM

% Complete 0.00%

Priority

(Days)

Constraints

Type: Start On Or After

Constraint Date: 02/17/2027

Constraint Time: 8:00 AM

Calendar

None

New Edit...

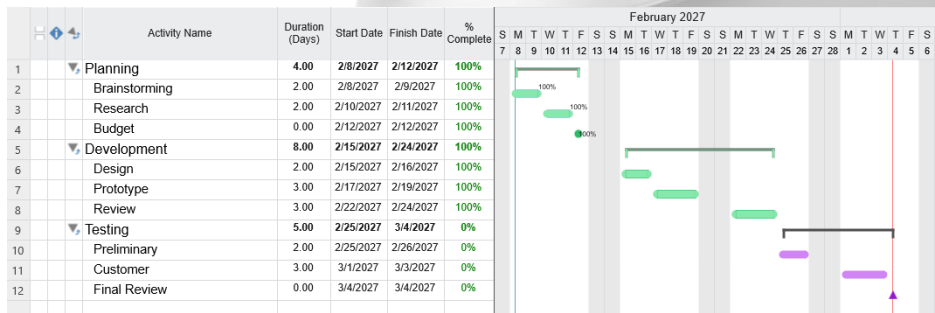
Ignore Resource Calendars

Cancel OK

Close

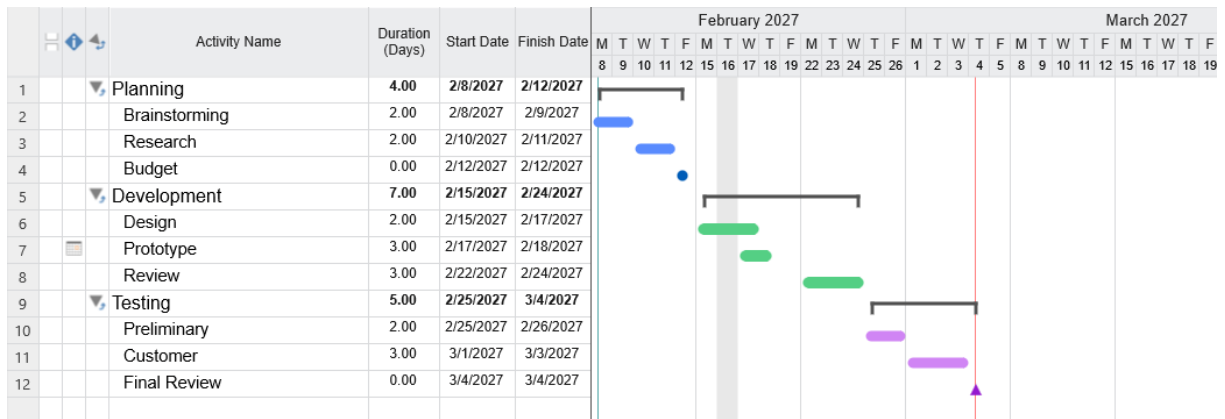
5. Click OK to close the New Calendar dialog.

Note the new Finish Date and Time. The task now begins on 2/17 at 8:00 AM and ends on 2/18 at 8:00 AM because work on this task can now occur 24 hours a day. With our overall work calendar, work can only occur for 8 hours each day. With a duration of 3, that would take 3 days, 8 hours a day. Now this task calendar allows the task to be completed in 24 hours, or 3 "shifts".



6. Click Close to close the Information Form.

Note that Prototype now has a calendar icon in its Information action column denoting its use of a work calendar different than the overall project work calendar.



You can see that the Prototype bar is smaller now and that, though the activity still has a duration of "3.00," it now has a Start Date and Time of 2/17/27 at 8:00 AM and a Finish Date and Time of 2/18/27 at 8:00 AM. Because a work day is still defined in 8 hour increments, the duration calculated in days equaling 3 means that that duration represents 3 sets of 8 hours or 24 total hours. Now that Prototype has a 24 hour calendar, its duration still displays in regards to the defined work days, but now all 24 hours can fit into one 24 hour time period - thus the new finish time. The bar will cover the entire day of the 17th, and end at the beginning of the 18th.

4.5 Finishing Advanced Tutorial 1

Finishing Advanced Tutorial 1

You are done with Advanced Tutorial 1. You now know the basics of defining and using the work calendar.

To close the Advanced Tutorial 1 file, from the File menu, select Close. Click No to close the schedule without saving your changes.

To start the next tutorial:

1. Go to [Advanced Tutorial 2: Filtering and Sorting.](#)

-or-

Return to the [Tutorial Contents.](#)

5 Advanced Tutorial 2: Filtering & Sorting

5.1 Filtering and Sorting - Intro

Advanced Tutorial 2 - Filtering and Sorting

This tutorial shows you how to use filters and sorts to hide and rearrange rows according to the data they contain.

Click the link below to download the practice schedule file to be used while taking this tutorial:

[Download The "FastTrack Schedule Advanced Tutorial Practice File 2.fts" and Open It.](#)

Important:

If you have trouble downloading and accessing the practice file, please call our Tech Support team for assistance: (703) 450-2318.

5.2 Applying a Filter

Applying a Filter

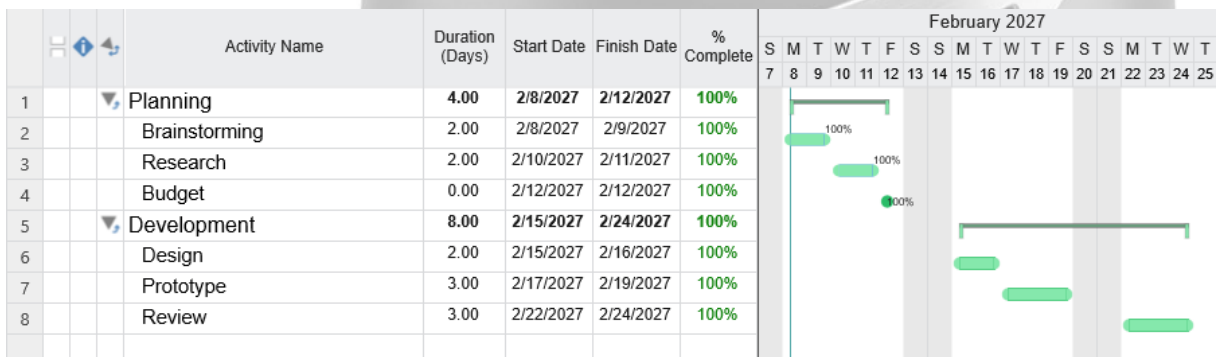
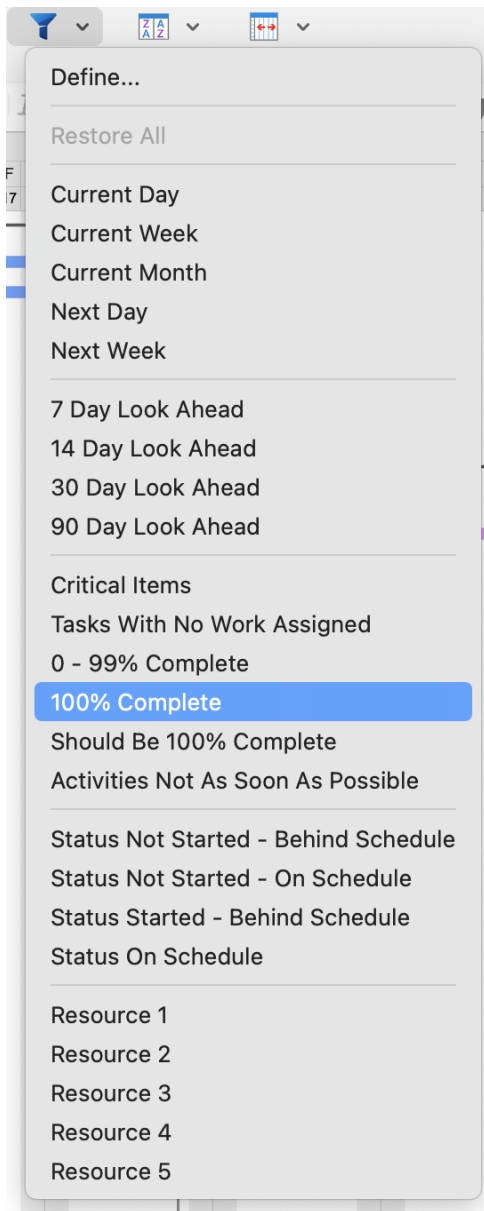
Filtering tasks allows you to hide and select rows based on criteria that you define. It is a way of searching rows for information. Filters can search your data for specific text, numerical values, or time periods.

For each schedule, you can define a list of filters that search for data in the schedule's tasks. Filters are stored in the Filters dialog. A large number of preset filters are available to you. You can also define your own filters.

Steps:

1. On the toolbar, click Filters, and choose 100% Complete from the drop-down list.





The filter has hidden all tasks that do not fulfill the criteria of being 100% Complete, in this case that is all of the tasks in the Testing phase. Those items are not deleted, they are just temporarily hidden.

By default, filters look at the information in the tasks that are currently visible and those that are hidden. If you wish to create a filter that looks for information that is visible only, deselect the "Expand All Prior to Filtering" and the "Restore All Prior to Filtering" options in the Options tab of the Define Filter dialog.

5.3 Defining a Filter

Defining a Filter

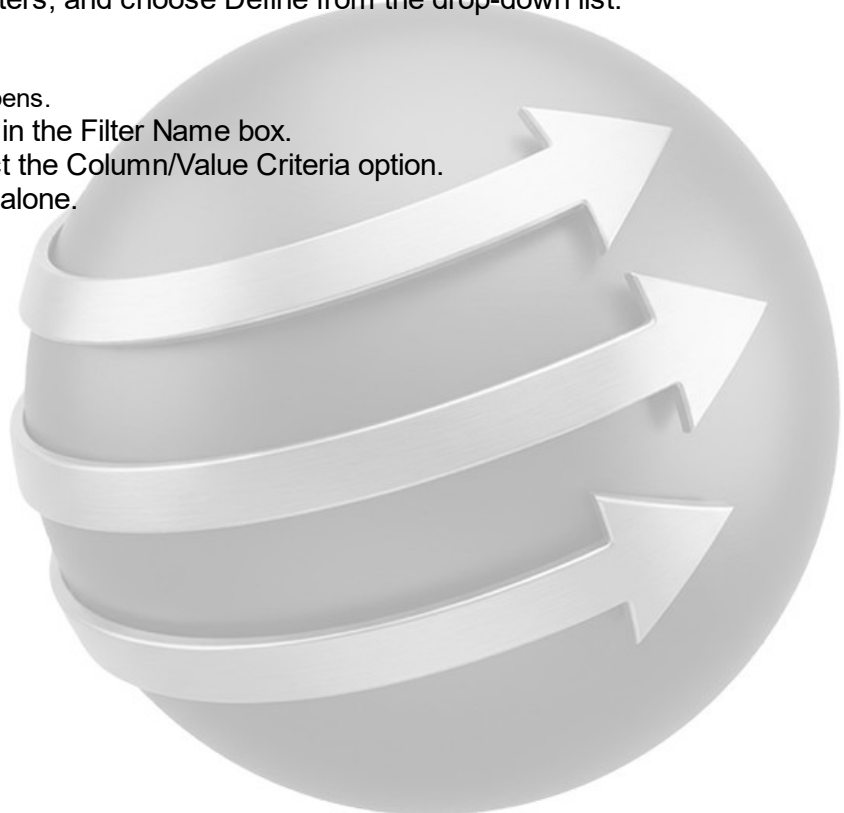
Filters are defined in the Define Filter dialog. You can think of the filter's criteria as questions the filter asks of each activity. Each question has three parts:

- a column in which to search
- a way of comparing the column data to values
- a value to look for

For this filter, you will define criteria that ask the question, "Which tasks have in the Resources Assigned column, a value equal to 'Smith'?"

Steps:

1. On the toolbar, click Filters, and choose Define from the drop-down list.
The Filters dialog opens.
2. Click New.
The Define Filter dialog opens.
3. Enter Smith's Projects in the Filter Name box.
4. In the Apply area, select the Column/Value Criteria option.
Leave all other options alone.



Filter Name:

Options | Column/Value Criteria | Date/Time Criteria

Apply:

- ☒ Column/Value Criteria
- ☐ Date/Time Criteria
- ☐ Column/Value Criteria AND Date/Time Criteria
- ☐ Column/Value Criteria OR Date/Time Criteria

☒ Expand All Prior to Filtering

☒ Restore All Prior to Filtering

☒ Apply All Bars Range After Filtering

☐ Highlight Matching Rows
Color:

Filter A Row When:

- ☒ Any Bar in that Row Matches
- ☐ First Bar in that Row Matches
- ☐ All Bars in that Row Match

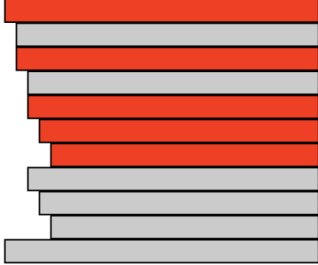
Matching Rows Display

Bar Options:

- ☐ All Bars in the Row
- ☒ Matching Bars Only

Row Options:

- ☐ Matching Rows Only
- ☒ Matching Rows AND:



? Cancel OK

6. Click the Column/Value Criteria tab.

7. To define the column in which to search, in the table, click Select Column in the first Column cell.

8. When the drop-down list that appears, type an "r" to scroll to Resources Assigned, then click to select it.

9. Click the first Test cell to select it.

10. From the drop-down list that appears, select the equal sign (=).

11. Click the first Value cell to select it.

12. Select Smith from the drop-down list to enter the value against which all tasks will be compared.

If a Value List had not been created for this column a value would have to be typed in manually.

Filter Name:

Options Column/Value Criteria Date/Time Criteria

(	Column	Test	Value	)	And/Or
	Resources Assigned	= (Equal To)	Smith		
	Select Column				

Insert Line
Delete Line
Clear Table

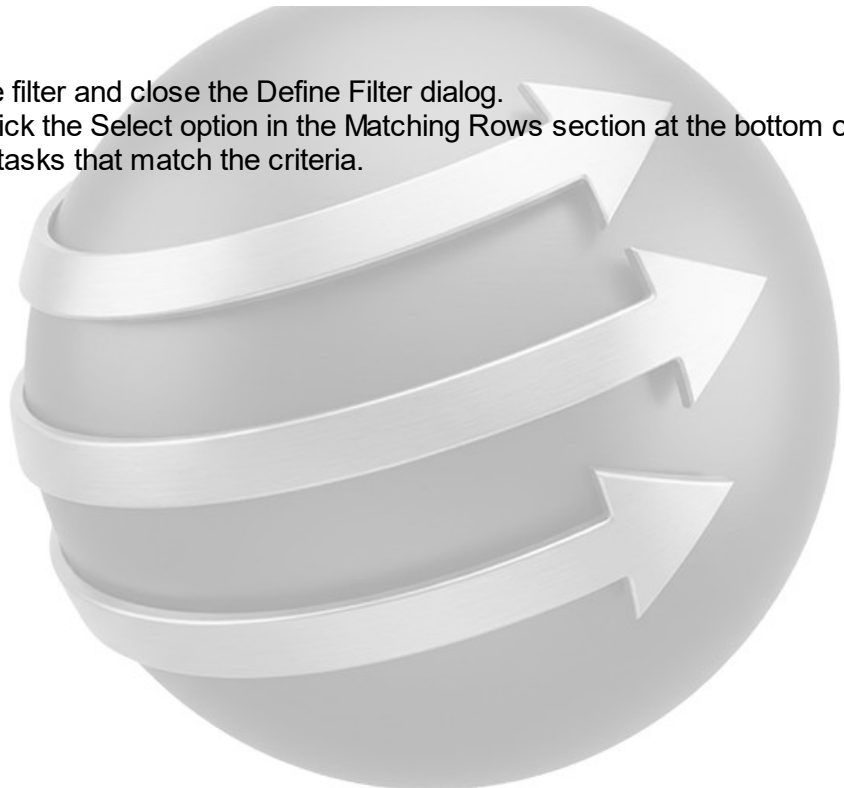
Options

Insert Function/Column into Value:

? Cancel OK

13. Click OK to create the filter and close the Define Filter dialog.

14. In the Filters dialog, click the Select option in the Matching Rows section at the bottom of the dialog to highlight the tasks that match the criteria.



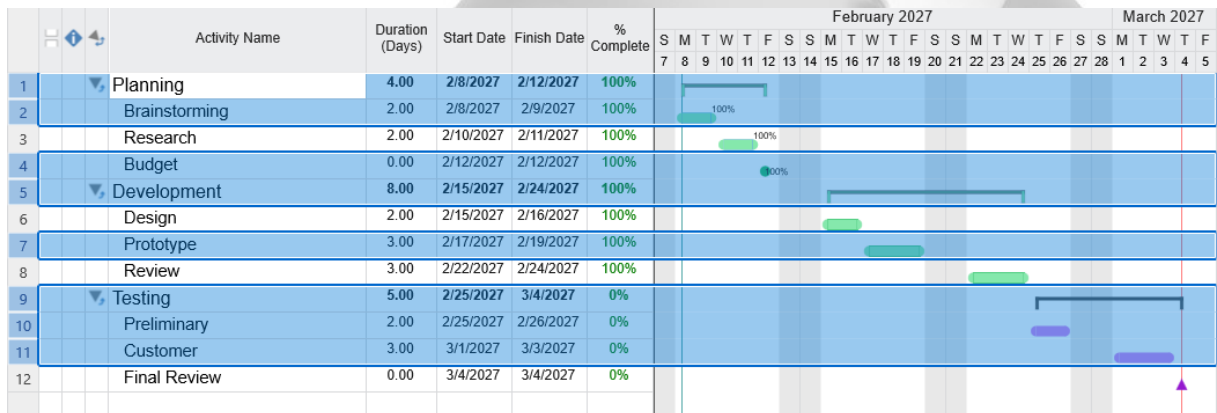
Filters	Menu	Break
Smith's Projects	☒	☐
Previous Hour	☐	☐
Previous Day	☐	☐
Previous Week	☐	☐
Previous Month	☐	☐
Previous Quarter	☐	☐
Previous Year	☐	☐
Current Hour	☐	☐
Current Day	☒	☐
Current Week	☒	☐
Current Month	☒	☐

Matching Rows

☐ Show
☒ Select

?

15. Click OK to apply the filter and close the Filters dialog.



Instead of hiding rows that do not match the filter criteria, this "Select" filter will highlight all of the rows that match the criteria. This will continue to show all data, but highlight the relevant data in context. If we left it as the default "Show", the filter would have functioned just like the 100% Complete filter we ran before, hiding all tasks not assigned to Smith.

Because the Restore All Prior to Filtering option is selected by default in the Define Filter dialog, all rows are restored from the last filter (100% Complete Filter) before the new filter is applied.

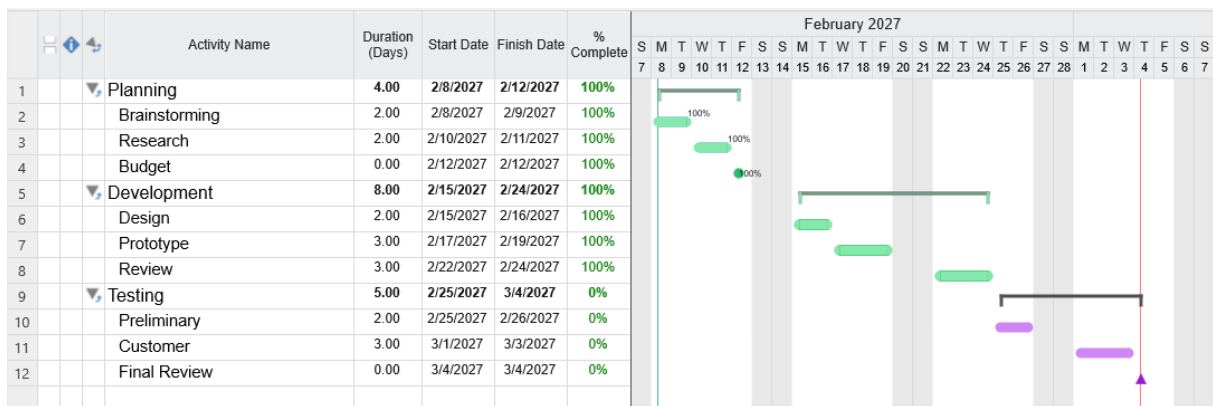
5.4 Restoring Filtered Tasks

Restoring Filtered Tasks

When you are done hiding or highlighting rows and wish to see all of the tasks again, you restore the schedule.

There are 2 ways to Restore All: you can click the red Restore All button in the bottom right of your window or you can go to the Filters control and choose Restore All.

Restore your schedule now.



Restore does not undo changes you have made to tasks while the filter was applied. It only shows hidden tasks or un-highlights tasks and returns them to the Master Sort Order.

You should be aware that changes you make to the order of tasks are not restored. Changes that could affect the order of tasks include: moving, deleting, inserting, cutting, and pasting rows.

5.5 Applying a Sort

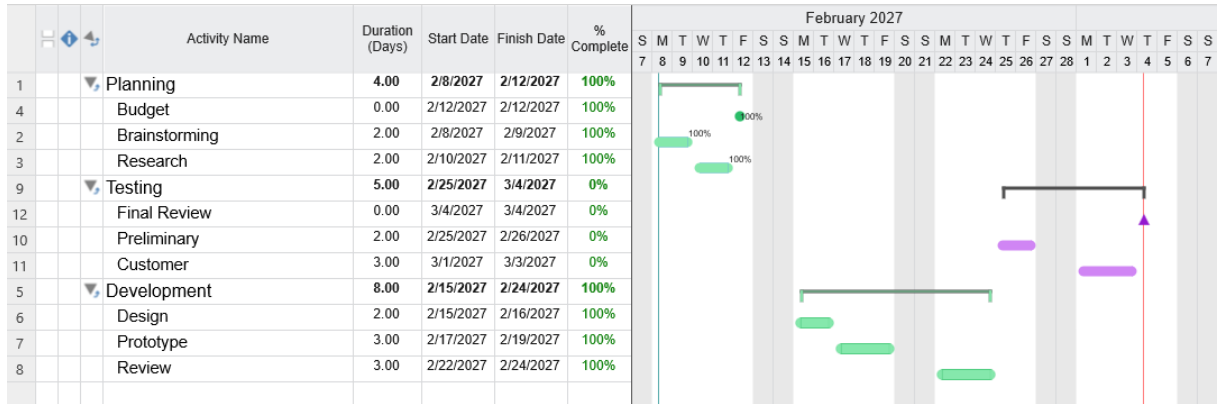
Applying a Sort

Whereas filtering hides or highlights rows, sorting rearranges the row order based on information in an activity's columns. Like filtering, sorting is done on visible tasks and can be temporary.

Steps:

1. On the toolbar, click Sorts, and choose By Duration from the drop-down list.

This sorts the rows by the values in their Duration column - lowest to highest, separated by their phase/outline level.



All of the tasks are sorted within their outline level. If you want sorts that sort regardless of outline level or phase you can define that when you edit or create a sort. The sort we will create in the next module will sort across all outline levels.

5.6 Defining a Sort

Defining a Sort

Sorts are defined in the Define Sort dialog. These steps create a sort that arranges tasks in order by their % Complete and Start Date.

Steps:

1. On the toolbar, click Sorts, and choose Define from the drop-down list.
The Sorts dialog opens.
2. Click New.
The Define Sort dialog opens.
3. In the Sort Name box, enter "By % Complete and Start Date".
4. In the Columns table, select % Complete.
5. Click the Show button.
6. To sort the % Complete value in descending order, click the stair-step icon next to the name in the Sort Order table to change it from Ascending to Descending order.
7. In the Columns table, scroll towards the bottom of the table and select Start Date.
8. Click the Show button.

Sort Name:

Set Sort Order

Columns	Sort Order
Remaining Overtime Work	% Complete
Remaining Regular Cost	Start Date
Remaining Regular Work	
Remaining Work	
Resource Cost	
Resources Assigned	
Scheduler Ignores Assignments	
Start Date 1	
Start Date 2	
Start Date 3	
Start Date 4	
Start Date 5	
Start Date 6	
Start Date 7	
Start Date 8	

Buttons: Show, Hide, Hide All

Applying this Sort Moves Rows

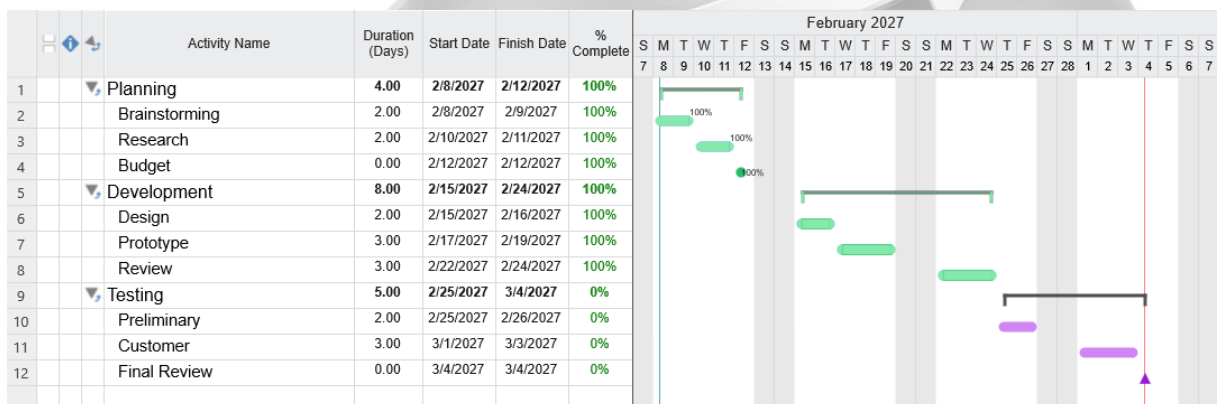
☒ Allow Rows to Move Anywhere

☐ Only Within Outline Levels

☐ Lock Outline Levels Through Level:

Buttons: ? Cancel OK

9. Click OK to create the sort and close the Define Sort dialog.
10. Click OK to apply the sort and close the Sorts dialog.



The schedule's tasks are moved up and down into the new sort order. First they are arranged in descending order by % Complete value and then the tasks with the same % Complete values are arranged in ascending order by Start Date.

The Sorts dialog also contains an option called Define as Master Sort that defines the selected sort as the Master Sort order. Once a sort order becomes the Master Order of tasks, you cannot return to the original order. When you restore tasks, they will restore to the current Master Sort order. Do not choose that now.

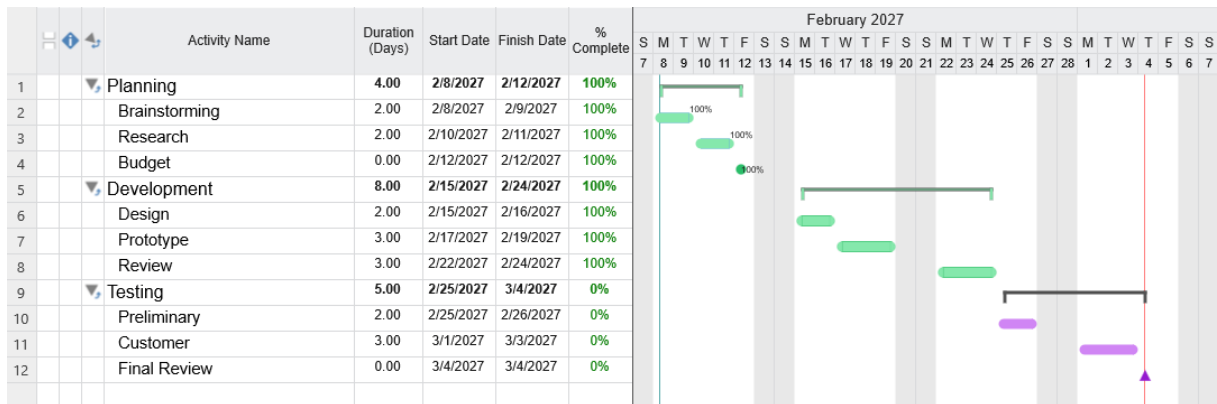
5.7 Restoring Sorted Tasks

Restoring Sorted Tasks

Like filtering, sorting is temporary if you return to the Master Sort order by restoring the schedule.

Just like with filters, there are 2 ways to Restore All: you can click the red Restore All button in the bottom right of your window or you can go to the Filters control and choose Restore All.

Restore your schedule now. Because the sort we created was the same as our original schedule, nothing will change.



Restoration returns the schedule to its Master Sort Order. Remember, restoring does not undo changes you have made to tasks while it was sorted. It shows hidden tasks and returns them to the Master Sort Order.

5.8 Finishing Advanced Tutorial 2

Finishing Advanced Tutorial 2

You are done with Advanced Tutorial 2. You now know the basics of filtering and sorting.

To close the Advanced Tutorial 2 file:

1. To close the Advanced Tutorial 2 file, from the File menu, select Close.
2. Click No to close the schedule without saving your changes.

To start the next tutorial:

1. Go to [Advanced Tutorial 3: Using Summaries and Calculations.](#)
-or-
Return to the [Tutorial Contents.](#)

6 Advanced Tutorial 3: Using Summaries & Calculations

6.1 Using Summaries and Calculations - Intro

Advanced Tutorial 3 - Using Summaries and Calculations

This tutorial shows you how to use column summaries, summary graphs, and calculation columns.

Click the link below to download the practice schedule file to be used while taking this tutorial:

[Download The "FastTrack Schedule Advanced Tutorial Practice File 3.fts" and Open It.](#)

Important:

If you have trouble downloading and accessing the practice file, please call our Tech Support team for assistance: (703) 450-2318.

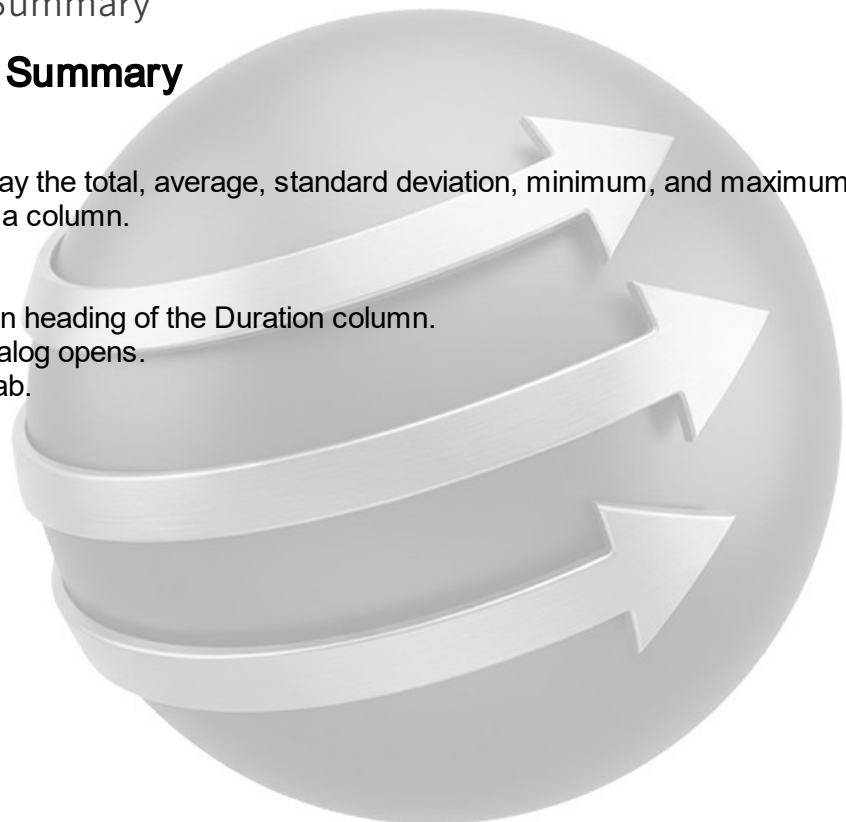
6.2 Adding a Column Summary

Adding a Column Summary

Column summaries display the total, average, standard deviation, minimum, and maximum of values currently visible in a column.

Steps:

1. Double-click the column heading of the Duration column.
The Format Column dialog opens.
2. Click the Summaries tab.
3. Select the Total option.



Options | Value List | Display | Font | **Summaries**

Column Summaries

☐ Count	☐ Minimum
☒ Total	☐ Maximum
☐ Average	☐ Standard Deviation

Label Display

☐ Do Not Show Label
(Uses Column Justification)

☒ Show Label
(Ignores Column Justification)

☐ Short Label

☐ Medium Label

☒ Long Label

Summary Bar Values

☐ None

☐ Count

☐ Total

☐ Minimum

☐ Maximum

☐ Average

☐ Standard Deviation

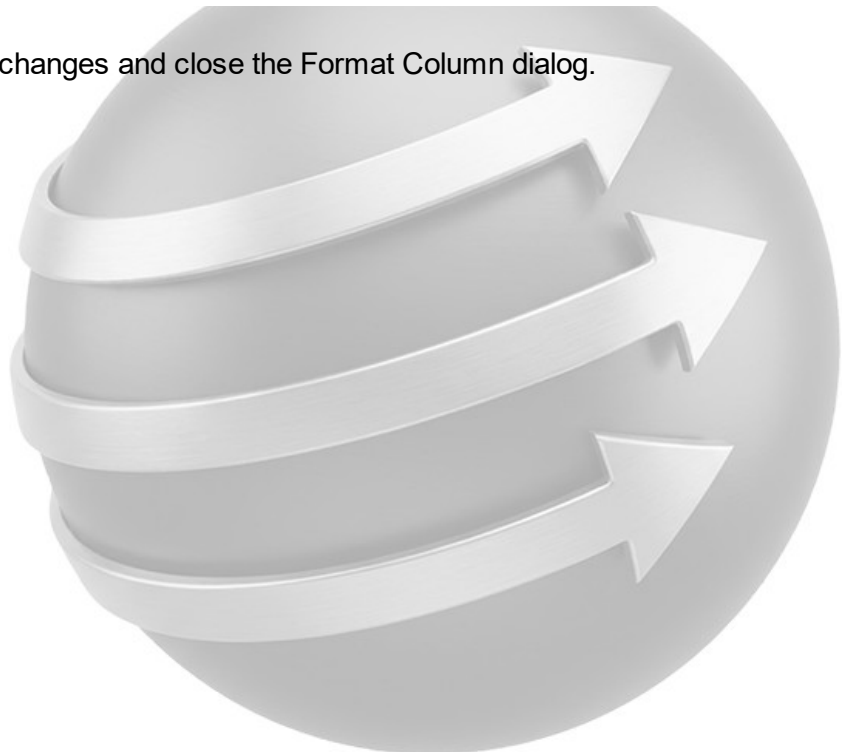
Example:

Total:	10.00
--------	-------

?

Cancel OK

4. Click OK to apply your changes and close the Format Column dialog.



Steps:

1. Click the column heading of the Rate Per Day column to select the column.
2. From the Insert menu, select Column.
The Insert Column dialog opens.
3. From the Show drop-down list, select Calculation.
4. In the Column Display Name table, select Calculation 1.

Show: Calculation

Column Display Name
Calculation 1
Calculation 2
Calculation 3
Calculation 4
Calculation 5
Calculation 6
Calculation 7
Calculation 8
Calculation 9
Calculation 10
Calculation 11
Calculation 12
Calculation 13
Calculation 14
Calculation 15
Calculation 16
Calculation 17
Calculation 18
Calculation 19
Calculation 20
Calculation 21

 Cancel OK

5. Click OK to insert the column.
The Format Calculation dialog opens.

Keep the Format Calculation dialog open for the next section.

6.4 Setting Up a Calculation

Setting Up a Calculation

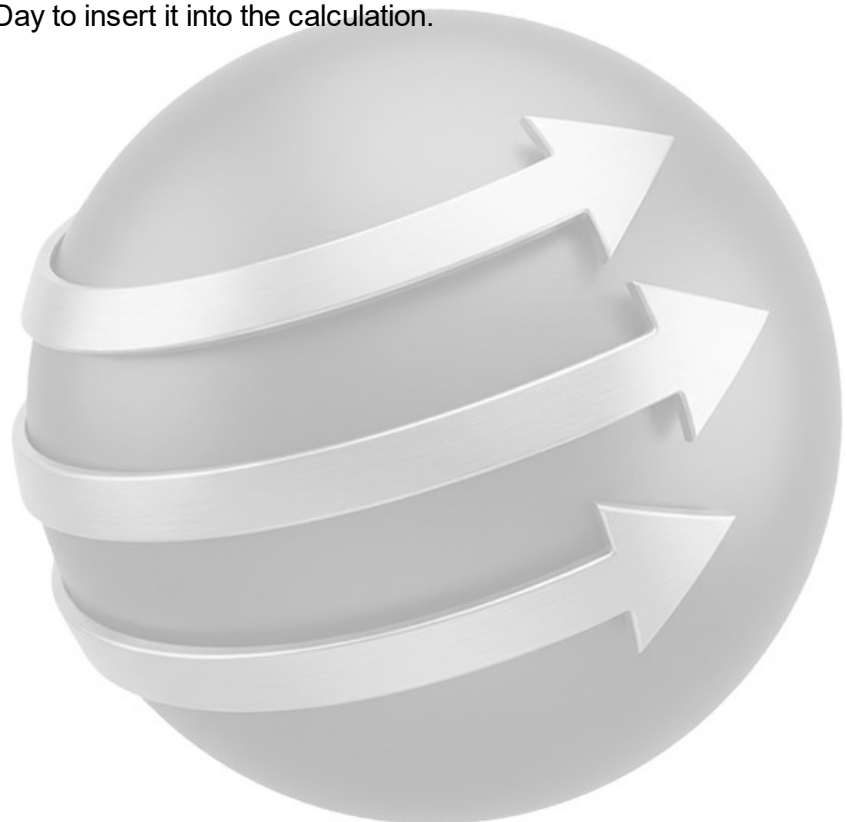
A calculation contains an expression that FastTrack Schedule evaluates to derive a value for each activity bar. An expression can contain:

- column names - though they must be defined as part of the bar, not row
- operators - like +, -, *, /
- functions - like Ave() for finding the average; or If() for testing for conditions
- values - like the number 20 or text strings like "Bob"

Here, you will define a simple calculation that multiplies the Duration of an activity bar by its Rate per Day. This will represent the cost of the activity bar.

Steps:

1. In the Format Calculation dialog, select Duration from the Columns table and double-click it to enter it in the calculation.
2. In the Operators table, double-click the "*" button to insert the multiplication operator.
3. Use the scroll bar of the Columns table to scroll to Rate per Day.
4. Double-click Rate per Day to insert it into the calculation.



Enter the formula for your calculation here:

[Duration] * [Rate Per Day]

This Calculation Returns: Undefined

Functions:

All Functions

Columns	Operators	Functions
Overtime Work	+	Abs(Number)
Predecessors	-	Ave(Arg1, Arg2, ...)
Priority	*	AveDev(Arg1, Arg2, ...)
Rate Per Day	/	Cos(Number)
Regular Cost	" "	CustomDateline01Date()
Regular Work	()	CustomDateline01Time()

Check Calculation

[Rate Per Day] is of type:Number

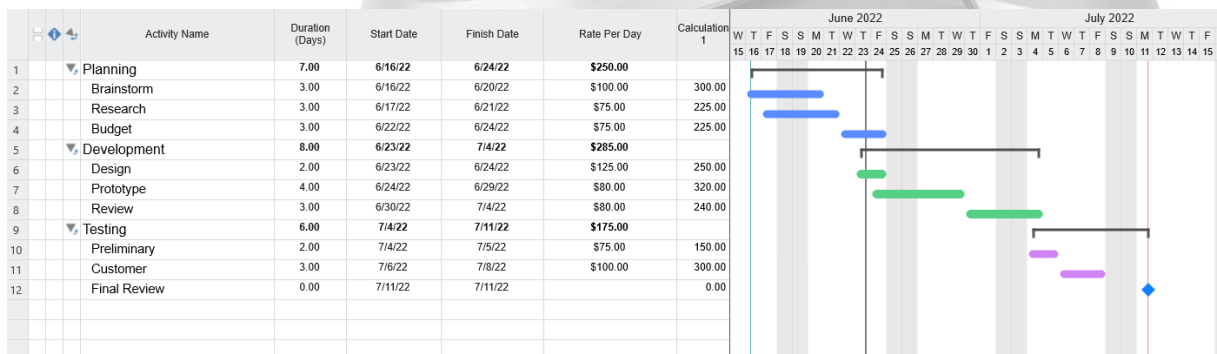
Function Reference

?

Cancel

OK

5. Click OK to save the calculation and close the Format Calculation dialog and the Insert Column dialog.



6. Double-click the Calculation 1 column heading to open the Format Column dialog in the Options tab.

7. In the Customized Column Name box enter Activity Costs.

Options | Display | Font | Summaries

Customized Column Name:

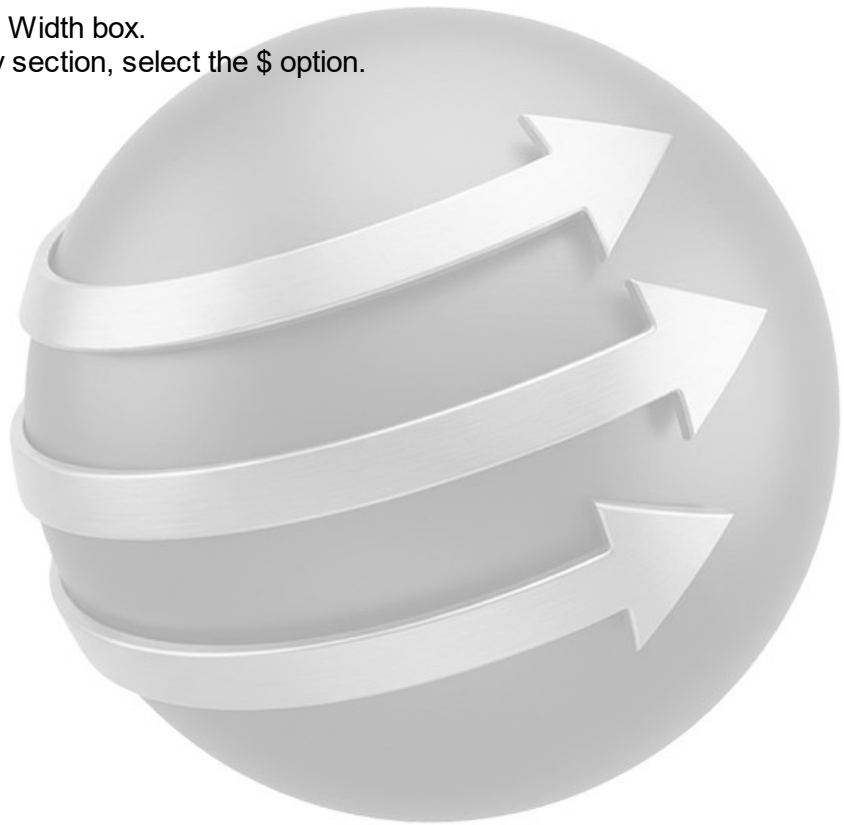
Default Column Name:

Column Type Specific Options

☒ Stored per bar

☒ Show in Information Form

8. Click the Display tab.
9. Enter 80 in the Column Width box.
10. In the Number Display section, select the \$ option.



Options Display Font Summaries

Column Width:

Number Display

☒ Thousands Separators

☐ (Negative)

☐ Negative in Red

☒ \$

☐ %

Decimal Places:

Example: \$-123,456,789.12

? Cancel OK

11. Click OK to apply your changes and close the Format Column dialog.

The values which appear in the Cost column display the result of the calculation you just defined: Duration * Rate per Day. For instance, the Brainstorm activity bar costs \$200 which is the Duration (2 days) times the Rate (\$100 per day).

6.5 Defining a Summary Graph Row

Defining a Summary Graph Row

Summary graphs are similar to column summaries—they display the total, average, standard deviation, minimum, and maximum of values. Instead of summarizing values in a column, however, they summarize values in the time periods of the timeline graph. They appear directly beneath the timeline graph.

To define a summary graph row, you must tell it the unit of time to summarize, what data to summarize, and what summary operation to perform.

Steps:

1. From the Insert menu, select Summary Graph.
The Format Summary Graph dialog opens.
2. From the Summary Units drop-down list, select Weeks.
3. In the table, click the first cell in the Data to Summarize section.

4. From the drop-down list that appears, select Activity Costs. It will be near the top of the list.
5. Click the drop-down list in the Summary Operation section.
6. From the options that appear, select Total.
7. Click the drop-down list in the Display As section.
8. From the options that appear, select Histogram.
9. Click the Fill Color box and, from the Color dialog, choose a shade of blue and click OK.
10. In the table, select the Show Labels box.
11. In the Label Options area at the bottom of the dialog, change the Decimal Places to 0 (zero).
12. In the Left Label box at the top of the dialog, enter "Weekly Costs".

Summary Units:
 Weeks
 Starts On: October

Left Label: Weekly Costs
 Right Label:
☐ Mirror Labels

Data to Summarize

Bar Style to Summarize:
☒ All Bar Styles
☐ Cumulative
☐ Use Values Before Current Visible Range
☐ Ignore Values Before Current Visible Range

Distribute Column Data Across:
☐ Baseline Duration
☒ Scheduled Duration
☐ Actual Duration / % Complete

Display As: Histogram

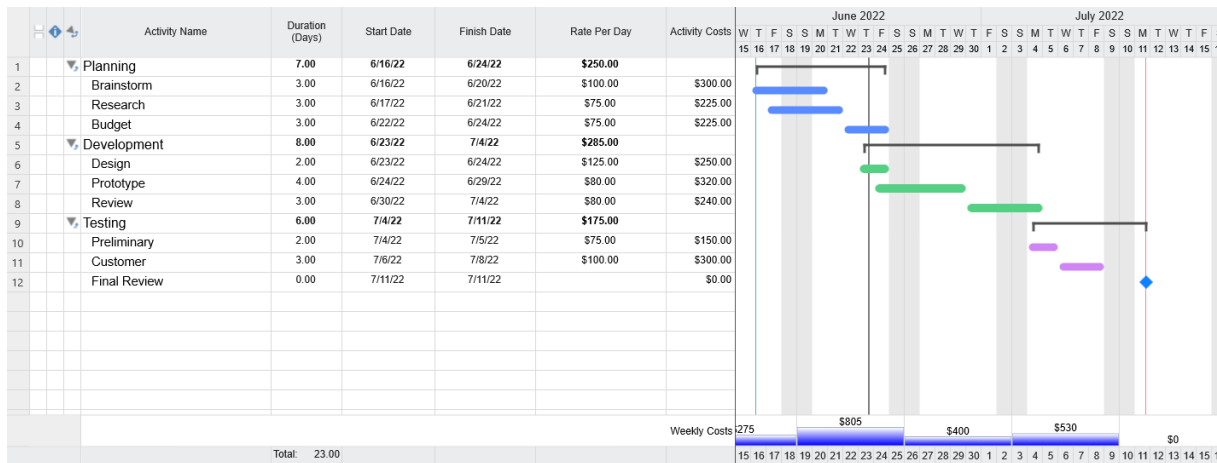
Summary Operation:
 Total

Label Options:
☒ Show Labels
☒ Thousand Separator
☒ (Negative)
☒ \$ ☐ %
 Decimal Places: 0

Outline Color:
 Outline Size: 0.50
 Fill Color:
 Fill Pattern:

Buttons: Insert New Summary, Duplicate Summary, Delete Summary, ? (Help), Cancel, OK

13. Click OK to apply your changes and close the Format Summary Graph dialog.



This summary graph row now shows you the total expenditure per week.

Note:

You can choose to show or hide a particular summary row in the Summary Graph tab of the Define Layout dialog.

6.6 Finishing Advanced Tutorial 3

Finishing Advanced Tutorial 3

You are done with Advanced Tutorial 3. You now know the basics of defining and using column summaries, summary graphs, and calculation columns.

To close the Tutor8 file:

1. To close the Tutor8 file, from the File menu, select Close.
2. Click No to close the schedule without saving your changes.

To start the next tutorial:

1. Go to [Advanced Tutorial 4: Working with Resources](#).Tutor9WorkWResrces
-or-
Return to the [Tutorial Contents](#).

7 Advanced Tutorial 4: Working with Resources

7.1 Working with Resources - Intro

Advanced Tutorial 4- Working with Resources

This tutorial shows you how to create resources, display resources, and assign them to tasks.

Click the link below to download the practice schedule file to be used while taking this tutorial:

[Download The "FastTrack Schedule Advanced Tutorial Practice File 4.fts" and Open It.](#)

Important:

If you have trouble downloading and accessing the practice file, please call our Tech Support team for assistance: (703) 450-2318.

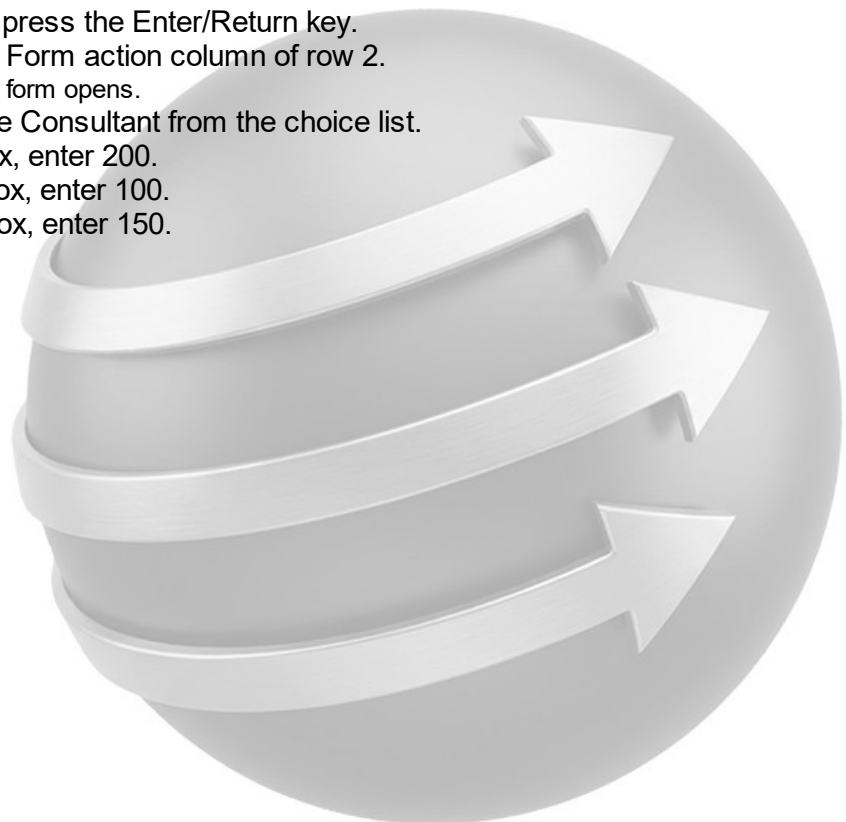
7.2 Creating a New Resource

Creating a New Resource

Resources are the people or things that help you accomplish the tasks in your project. Every resource has a finite amount of time it can be used and effort it can exert. You can define these finite amounts in resource work calendars you can design specifically for each resource. Every resource also has a cost attached to it - whether it is a flat fee, a standard rate, an overtime rate, or any combination thereof. Each of these elements can be charted and controlled in the Resource View of FastTrack Schedule. You will now create a new resource.

Steps:

1. From the Views buttons on the toolbar, click the Resource button. This switches to the Resource View.
2. Click in the Row 1 Resource Name column.
3. Type Jane Phillips and press the Enter/Return key.
4. Click in the Information Form action column of row 2.
The Resource Information form opens.
5. In the Type box, choose Consultant from the choice list.
6. In the Per Use Cost box, enter 200.
7. In the Standard Rate box, enter 100.
8. In the Overtime Rate box, enter 150.



Resource Information: (Jane Phillips : Row 169877536)

Information Contacts Other Columns

Resource

Name: Jane Phillips

Company: Initials: JP

Department: Employee ID:

Job Title: Group:

Assignment Default Values

% Effort: Per Use Cost: \$200.00 Standard Rate: \$100.00/h Category: Consultant

Work Contour: Flat Overtime Rate: 150 Material Label: Code:

Resource Notes:

9. Click the Work Calendar tab.

Note that a typical workday for Jane Phillips is defined as being 8 hours long and lasting from 8 AM to 5 PM (with an hour off for lunch), and that no non-typical workdays (such as a half day for a doctor's appointment Jane might have) are, currently, defined.

10. Click Close to close the Resource Information form.

						June 2021													
		Resource Name	Resource Image	Resource Notes	Sun	Mon	Tues	Wed	Thur	Fri	Sat	Sun	Mon	Tues	Wed	Thur	Fri	Sat	
1		Jane Phillips			13	14	15	16	17	18	19	20	21	22	23	24	25	26	
		Percent Work Usage			0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
		Hourly Work Usage			0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	
		Assignments			0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	0.00 h	
2																			

7.3 Assigning a Resource to a Task

Assigning a Resource to a Task

Assignments link a resource and all its data to a task or tasks in the schedule. The Schedule View and the Resource View draw from two different pools of information. Assignments act as a bridge between those two pools of information.

You can create a schedule full of tasks and you can create numerous resources complete with work calendars and cost data, but until you actually assign a resource to a task, the Schedule View and the Resource View do not interact.

You will now assign Jane Phillips to work on an activity in the schedule.

Steps:

1. From the Views buttons on the toolbar, click the Schedule button.
2. Double-click the Design bar, located in row 6.
The Information form opens in the Bars>Tracking tab.
3. Click the Bars>Assignments tab of the Information form.
4. In the Resource Name column of the table, select Jane Phillips from the drop-down list.
You can now see additional information about that assignment including the resource costs and work units.

Task Information: (Design : Row 6)

Bar ID 4

☐ Hidden

Bar Style: Bar Style 2

◀

▶

Duration: 2.00

☒ Fixed Duration

Row

Bars

◀

▶

Tracking

Columns

Links

Assignments

☐ Apply Effort Driven Scheduling (Keeps total work constant)

Clear Assignments

...	Resource Name	Work	%	Contour	Per Use	Std Rate	OT Rate	Cost
?	Jane Phillips	16.00	100	Flat	\$200.00	\$100.00/h	\$150.00/h	\$1,800
	Select Resource							

Totals:

16.00

\$1,800

?

◀

◀

▶

▶

Close

7. Click Close to assign the resource and close the Information form.

You can also assign resources to tasks by using the Resources Assigned column. Once you insert the Resources Assigned column, a value list will automatically be created in the column

with all of the resources from the Resource View. If you add additional resources in the Resource View, those will be added to the value list.

7.4 Viewing Resource Subrows

Viewing Resource Subrows

There are three subrows in each row in the Resource View:

- The Percent Work Usage subrow displays a graph representing a resource's currently allocated time as a percentage of the overall available time for that resource for that day.
- The Allocated Time Usage subrow displays a graph representing a resource's currently allocated time in respect to the Work Units. The name of this row changes to match the Work Units you have set in the Document Preferences dialog. If your Work Units were set to Days, this subrow would be titled Daily Work Usage instead of Hourly.
- The Assignments subrow displays the activity bar or bars to which a resource is assigned. Assignment bars display just as they do in the Schedule View. Links, however, do not display.

Steps:

1. From the Views buttons on the toolbar, click the Resource button.
All three subrows of row 2 are collapsed.
2. Click the Expand All button in the Format toolbar.
You can now view the Usage graphs and assigned bars for Jane Phillips.

				June 2022											
				Wed	Thur	Fri	Sat	Sun	Mon	Tues	Wed	Thur	Fri	Sat	Sun
				22	23	24	25	26	27	28	29	30	1	2	3
1	Jane Phillips														
	Percent Work Usage														
	Hourly Work Usage														
	Development: Design														

You can use these graphs to spot over-allocations and under-allocations for the resource throughout the project. If a resource exceeds 100% of the Percent Work Usage for a day, red will appear on that day highlighting the over-allocation. This often occurs if a resource is assigned to multiple tasks on the same day.

7.5 Finishing Advanced Tutorial 4

Finishing Advanced Tutorial 4

You are done with Advanced Tutorial 4. You now know the basics of defining and assigning resources.

To close the Tutor9 file:

1. To close the Tutor9 file, from the File menu, select Close.
2. Click No to close the schedule without saving your changes.

To start the next tutorial:

1. Go to [Advanced Tutorial 5: Using FastSteps](#).
- or-
- Return to the [Tutorial Contents](#).

8 Advanced Tutorial 5: File Portfolios

8.1 Project Portfolios

Advanced Tutorial 5 - Project Portfolios

This tutorial shows you how to consolidate separate subordinate files into one master file using our Portfolio feature.

Click the link below to download the practice schedule files to be used while taking this tutorial:

[Download The "FastTrack Schedule Advanced Tutorial Practice File 5.fts" and Open It.](#)

[Download The "FastTrack Schedule Advanced Tutorial Practice File 5 P1.fts".](#)

[Download The "FastTrack Schedule Advanced Tutorial Practice File 5 P2.fts".](#)

Important:

If you have trouble downloading and accessing the practice file, please call our Tech Support team for assistance: (703) 450-2318.

8.2 Understanding Portfolios

Understanding Portfolios

Portfolios allow you to easily combine multiple files into one master file to analyze a big picture view of your data. Whether you want to see all the separate components of one larger project, or see every project your company is currently working on, the Portfolio feature allows

you to do so. A Portfolio works across platforms so included files can originate from either a Mac or Windows operating system.

Master file - the file you create by consolidating existing files is called a master file. A master file can never be inserted into another file or into itself.

Subordinate file - a file that is inserted into a master file is called a subordinate files.

Subordinate files must be accessible, either on the hard drive or by network, and openable. The master file's user must have read access to a file to insert it.

Important:

Subordinate files in the Portfolio are not live. There are no automatic updates. When data changes in a subordinate file the changes do not appear in the master file until you choose to refresh the data from that subordinate file. Changes you make to data in the master file must be manually applied to the appropriate subordinate files.

A key to creating a Portfolio is the project Work Calendar. All subordinate files must have the same project Work Calendar as the master file. If you try to insert a file with a different project Work Calendar that file will be ignored and not inserted.

Changes to data in the master file are for analysis only and do not affect the subordinate file. If you decide that you want to apply changes you have made in a master file, you must open the appropriate subordinate files and manually make the changes there.

The following data is consolidated in a Portfolio:

- All columns – except calculation columns
- Bars and bar styles
- Pictures, text boxes and legends
- Links
- Assignments
- Pointers

Any conflict in data between a subordinate and the master file results in that data being excluded from the Portfolio.

If a column in a subordinate file is formatted to save data Per Bar and the same column in the master file is formatted to save data Per Row, that column will not be included in the Portfolio

The Portfolio is data driven, not visual. Formatting related information will not be transferred to the Portfolio. Formatting is originally determined by the master file's preference settings. You can edit Filter, Sort, Layout, Range, FastSteps and format settings in the master file, but the changes will not be applied to the subordinate file unless you manually apply them.

Resources do not get deleted from the master file even if future updates of the subordinate file in which the resource originated no longer includes that resource.

You can include subordinate files that have different Resource Work Calendars defined for the same resource in a Portfolio

8.3 Defining a Portfolio

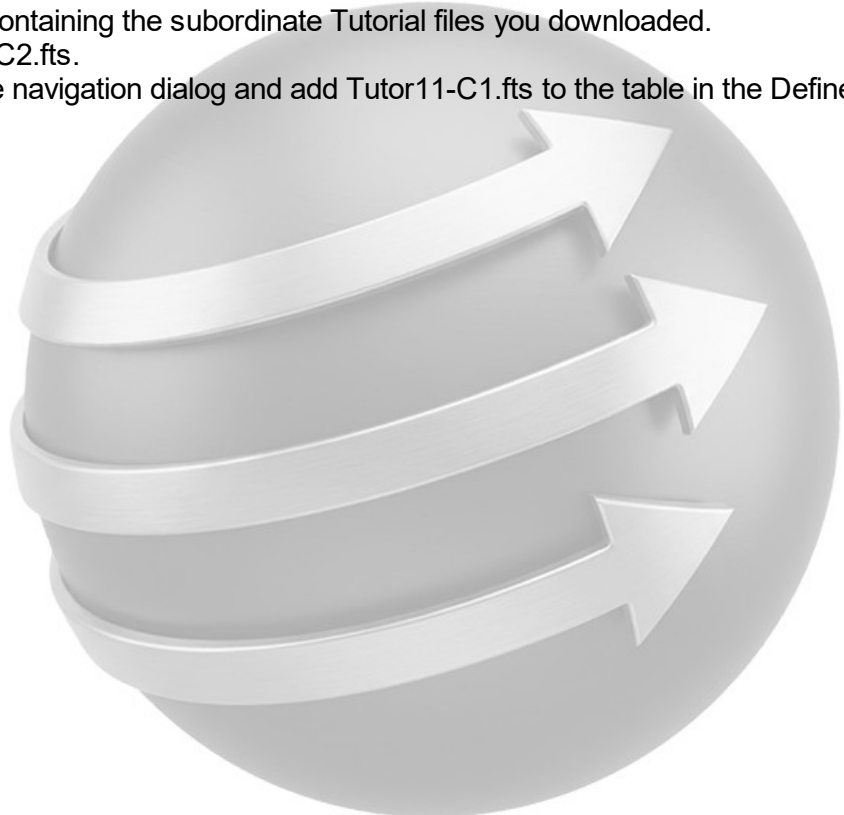
Defining a Portfolio

When creating a Portfolio, you will first need to establish a file to serve as your master file. Normally that just requires opening a new, blank file to serve as a repository for your consolidated files. The new, blank file will be a clean slate to display the subordinate files. You can also do some minor formatting to the master file before creating a Portfolio if you want things like a title or Headers/Footers created before adding the subordinate files.

For the Tutorial today, we have downloaded prepared file to serve as our master file. Open that file and then continue with the steps below.

To define the subordinate files to be included in the Portfolio:

1. From the File menu, choose Portfolio and select Define.
The Define Portfolio dialog opens.
2. Click Add.
The Open dialog opens.
3. Navigate to the folder containing the subordinate Tutorial files you downloaded. That will most likely be your Downloads folder unless you told your computer to download them to a different location.
4. Select the file Tutor11-C1.fts.
5. Click Open to close the navigation dialog and add Tutor11-C1.fts to the table in the Define Portfolio dialog.
6. Click Add.
7. Navigate to the folder containing the subordinate Tutorial files you downloaded.
8. Select the file Tutor11-C2.fts.
9. Click Open to close the navigation dialog and add Tutor11-C1.fts to the table in the Define Portfolio dialog.



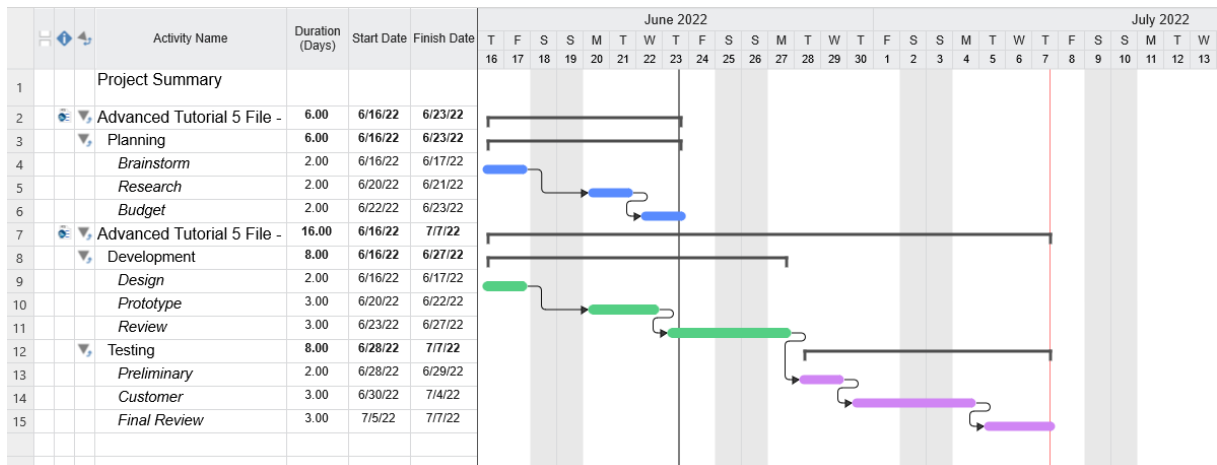
	File Name
1	Advanced Tutorial 5 File - P1.fts
2	Advanced Tutorial 5 File - P2.fts

Add
Remove
Locate
Update

☒ Files are subprojects and have a common Project Finish Date.
☐ Files are projects and have separate Project Finish Dates.

? Close Update All

10. Click Update All to consolidate both files into the master file Advanced Tutorial 5 File - MS.fts.



Now you can see both subordinate files together in the same Portfolio file. This gives you a "birds eye view" of what is going on across both projects.

You can update the Portfolio file at any time by going to the File menu, choosing Portfolio and selecting Get Updates.

If any saved changes have been made to one or more of the consolidated subordinate files, they will then display in the open master file.

8.4 Finishing Advanced Tutorial 5

Finishing Advanced Tutorial 5

You are done with Advanced Tutorial 5. You now know the basics of creating a file Portfolio.

To close the Tutorr11 file:

1. To close the Tutor11 file, from the File menu, select Close.
2. Click No to close the schedule without saving your changes.

Congratulations! You have completed the last tutorial. You should now have a good idea of how to use FastTrack Schedule's basic scheduling operations as well as some of its most powerful features.

If you want to see examples of how you might use FastTrack Schedule, open some of the example schedules installed with this application. Or, dive right in and start scheduling your own projects. And remember, as you continue to use FastTrack Schedule, help is only a click or call away.

9 Advanced Tutorial 6: Using FastSteps

9.1 Using FastSteps

Using FastSteps

This tutorial illustrates how to apply and create FastSteps.

To open the practice schedule file to be used while taking this tutorial:

1. In FastTrack Schedule, go to the Help menu, select Tutorials, and choose Tutorial Practice Files from the submenu.
2. Select the FastTrack Schedule file Tutor10.

Important:

If you cannot locate the Tutorial folder on your computer, go to Find and search for "Tutor10". If this produces no results, check with your System Administrator to make sure the Tutorial folder was included when FastTrack Schedule was installed on your computer.

9.2 What Are Faststeps?

What Are FastSteps?

FastSteps are a scripting ability, built into FastTrack Schedule. FastSteps allow you to automate repetitive management tasks by grouping a series of commands into a single

sequence that you can then initiate with a mouse click. FastSteps are available in the Schedule, Resource, and Calendar View and their Print Preview windows.

Each member of a project team can have a FastSteps sequence to suit his or her needs. You can create different sequences for every version of the schedule you would like to print, thus creating reports. There is no limit to the number of uses you can find for this powerful tool.

9.3 Applying a FastStep

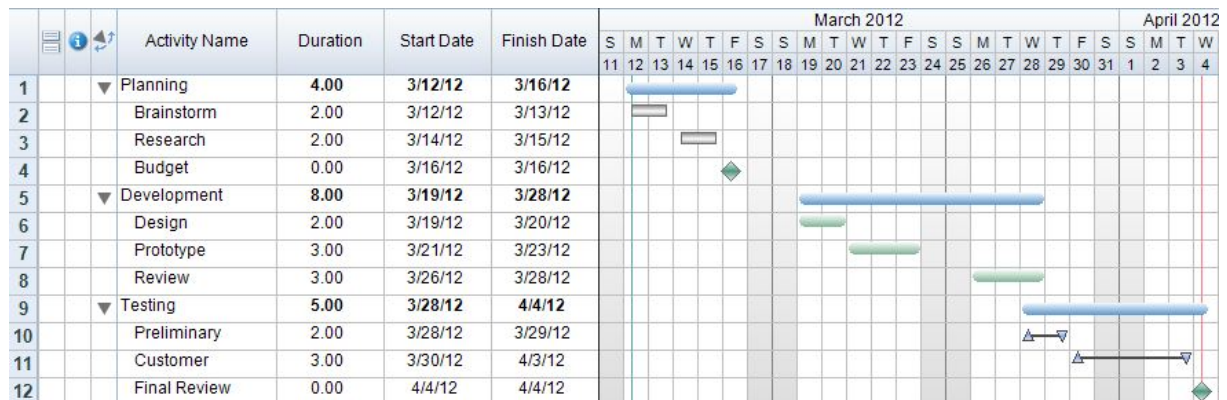
Applying a FastStep

In the Schedule View, existing FastSteps can be applied directly from the FastSteps submenu of the Schedule menu.

Steps:

1. From the Project menu, select FastSteps, and choose Restore Master Schedule from the submenu.

The View is switched to Schedule View, the Main Layout is applied, the Master Range is applied and all hidden rows are restored and returned to the Master Sort order.



9.4 Creating a Basic FastStep

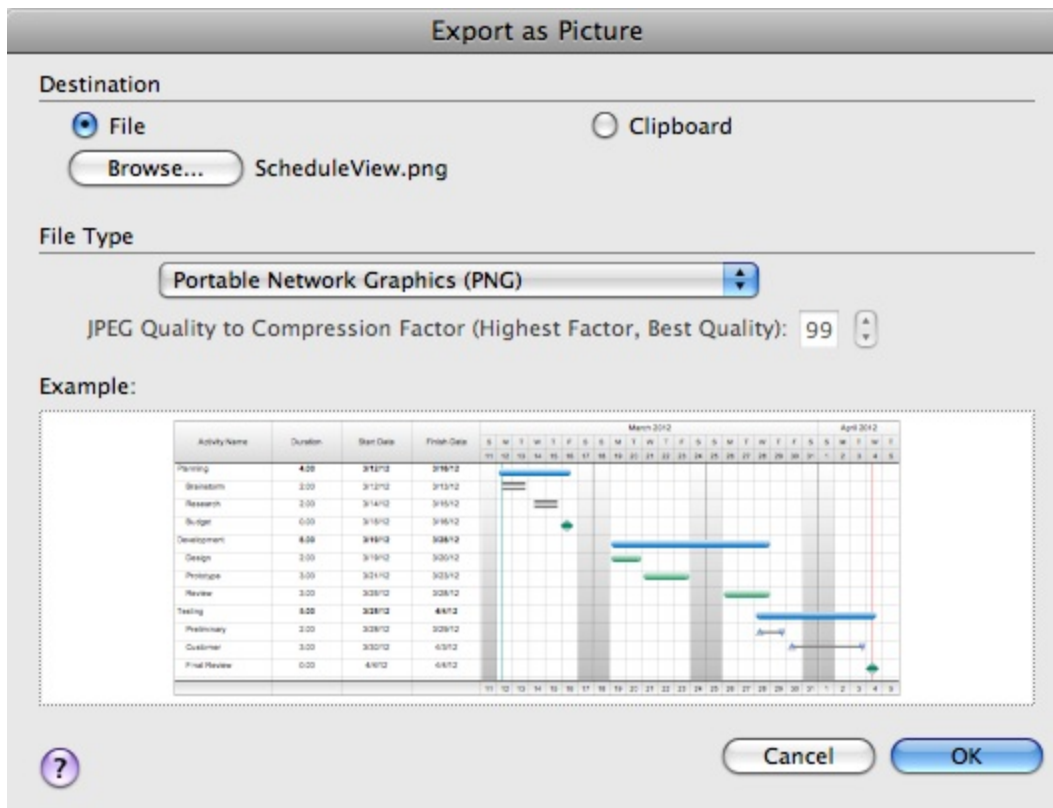
Creating a Basic FastStep

Custom FastSteps are created in the Define FastSteps dialog.

Steps:

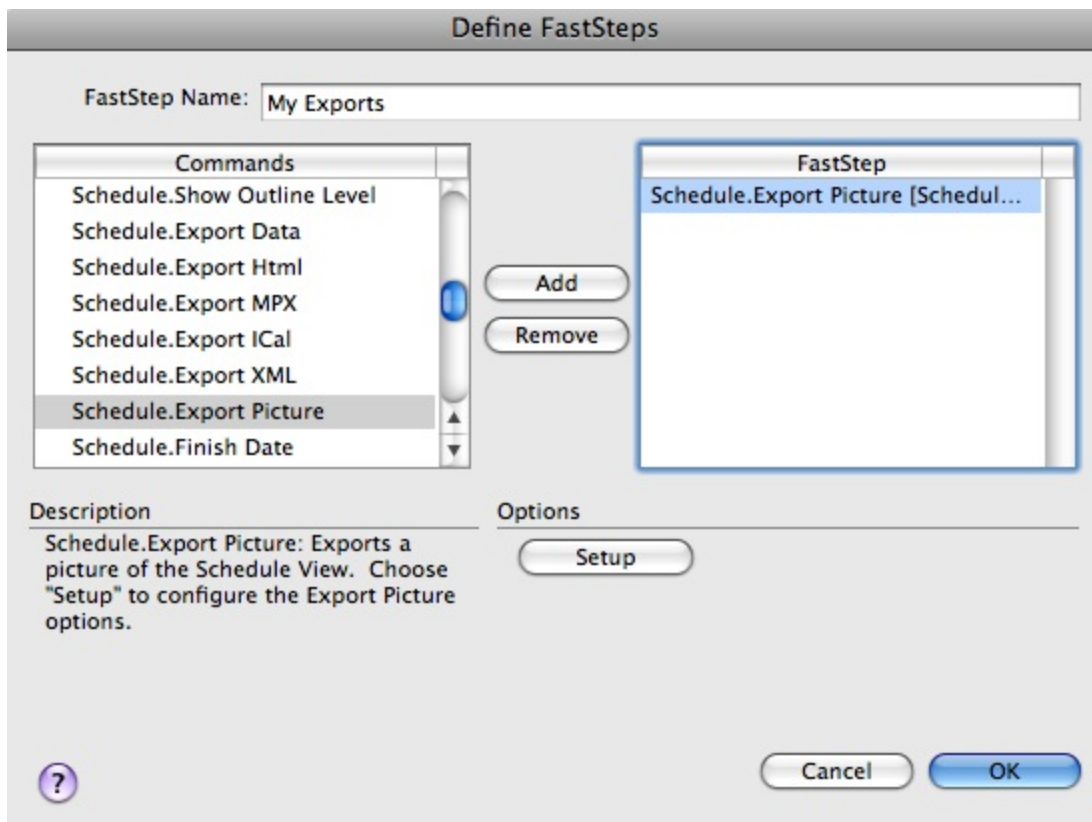
1. From the Project menu, select FastSteps, and choose Define from the submenu.
The FastSteps dialog opens.
2. Click the New button.

- The Define FastSteps dialog opens
3. Enter My Exports in the FastSteps Name box.
 4. From the Commands table scroll down to Schedule.Export Picture and click Add to send it to the FastStep table.
 5. In the FastStep table, click Schedule.Export Picture.
 6. Click the Setup button that appears in the Options area.
 7. In the Export as Picture dialog, select the File option
 8. From the File Type drop-down list, select Portable Network Graph (PNG).
 9. Click Browse.
 10. In the save dialog, navigate to your Desktop.
 11. Enter Schedule View as the filename.



12. Click Save.

Keep this dialog open for the next section.

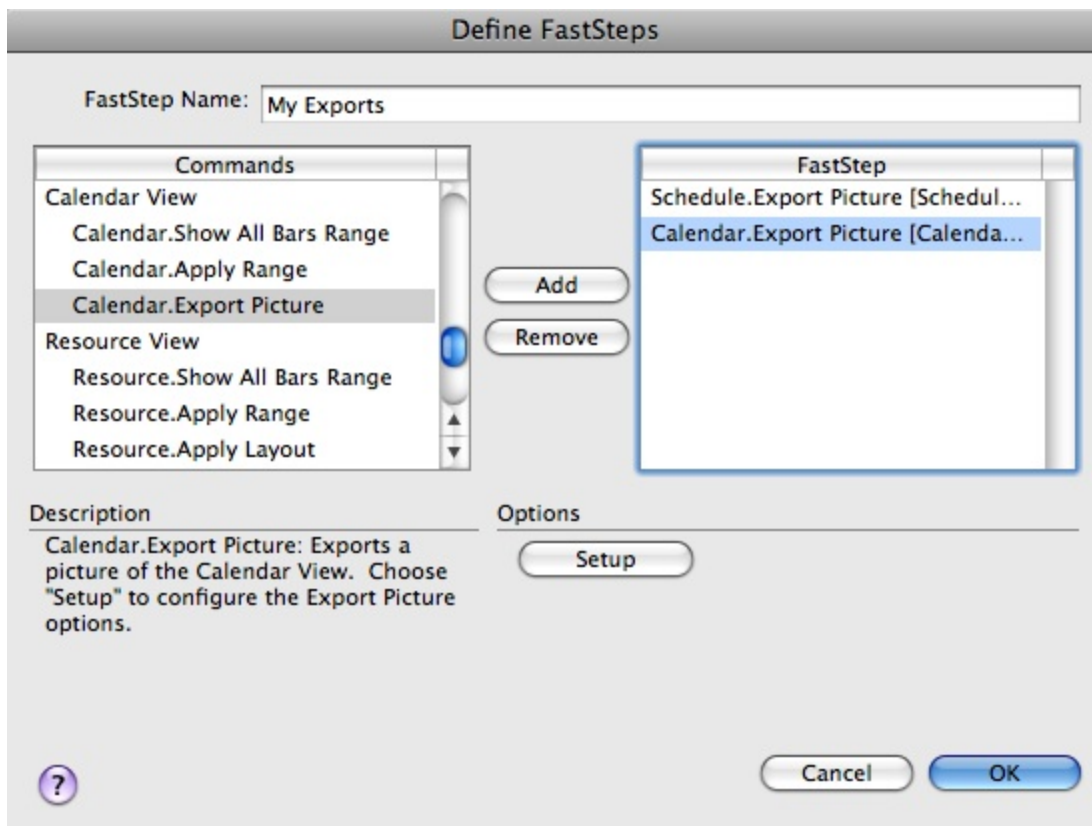


9.5 Creating a Basic FastStep (contd)

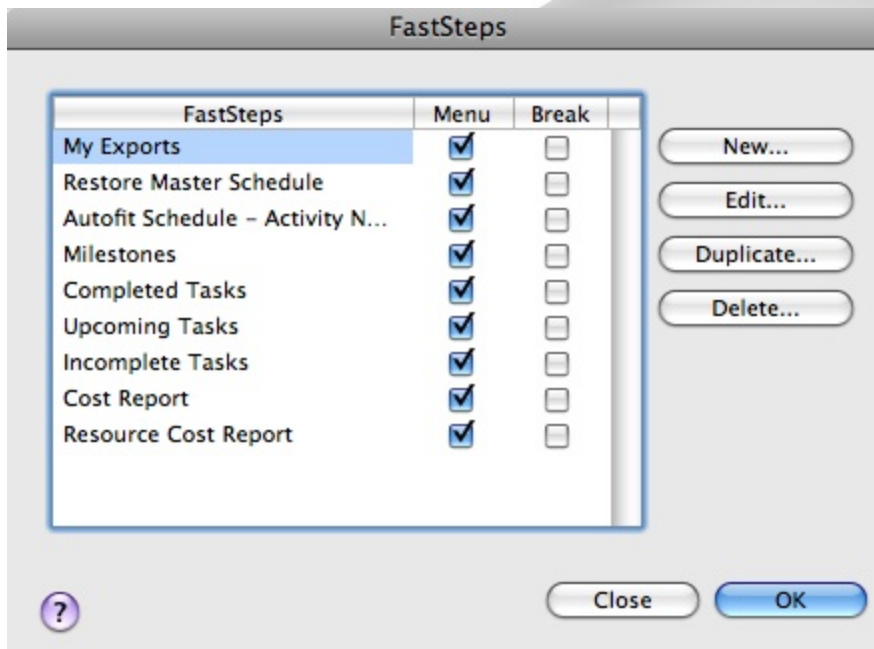
Creating a Basic FastStep (cont'd)

Steps:

1. Click OK to close the Export as Picture dialog.
2. In the Commands table, scroll down to Calendar.Export Picture and click Add to send it to the FastStep table.
3. In the FastStep table, click Calendar.Export Picture.
4. Click the Setup button that appears in the Options area.
5. In the Export as Picture dialog, select the File option
6. From the File Type drop-down list, select Portable Network Graph (PNG).
7. Click Browse.
8. In the save dialog, navigate to your Desktop.
9. Enter Calendar View as the filename.
10. Click Save.
11. Click OK to close the Export as Picture dialog.



12. Click OK to save the FastStep and close the Define FastSteps dialog.
13. In the FastSteps dialog, make sure My Exports is selected and click OK.



The Schedule View and Calendar View files appear on your Desktop.

9.6 Finishing Advanced Tutorial 6

Finishing Advanced Tutorial 6

You are done with Advanced Tutorial 5. You now know the basics of working with FastSteps.

To close the Tutor10 file:

1. To close the Tutor10 file, from the File menu, select Close.
2. Click No to close the schedule without saving your changes.

To start the next tutorial:

1. Go to [Tutorial 11 - Consolidating Files](#).
-or-
Return to the [Tutorial Contents](#).



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