AEC software

FastTrack Schedule 2026

User Manual

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FastTrack Schedule 2026 User 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 User Manual

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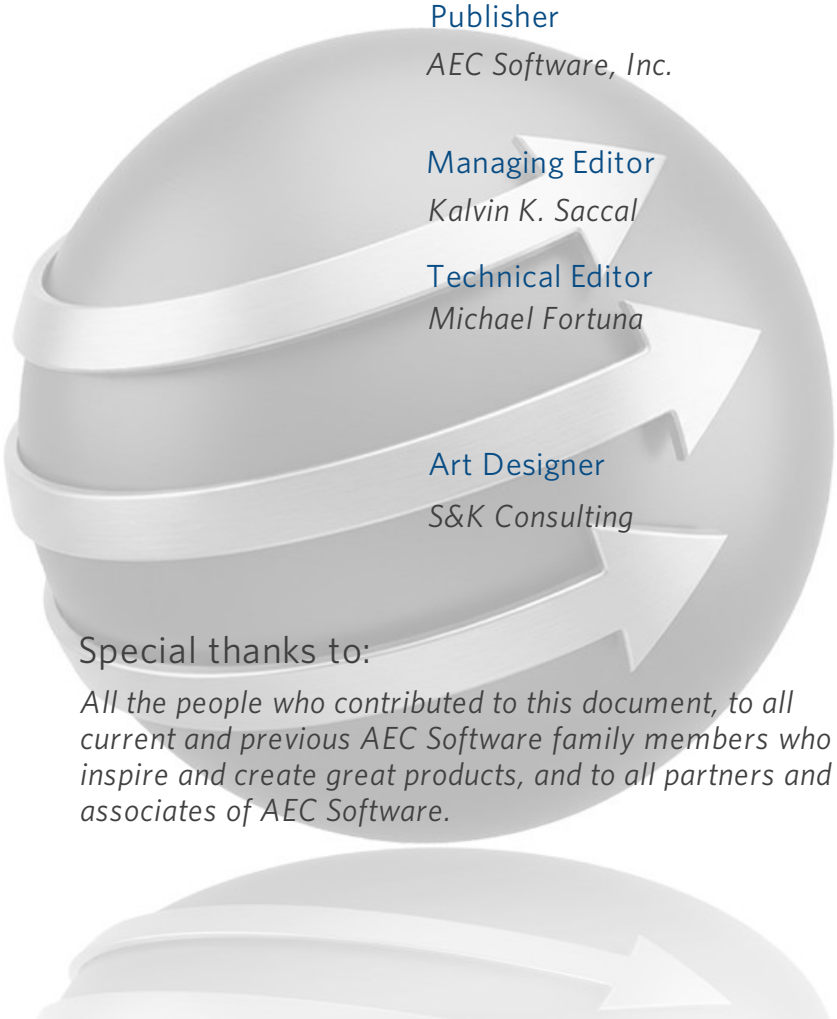

Table of Contents

Chapter 1 What is FastTrack Schedule? 15

Chapter 2 The FastTrack Schedule 2026 Environment 16

1 Views ... 16
The Schedule View ... 16
The Calendar View ... 16
The Resource View ... 17
2 Action Columns ... 18
Action Columns ... 18
3 Toolbars and Format Bar ... 19
The Tools control ... 19
The Bar Styles group ... 20
The Views group ... 21
The Timeline Range ... 22

Chapter 3 Schedule Files 23

1 Opening a schedule ... 23
2 Saving a schedule ... 24
3 Converting Mac Schedule Files to Windows Schedule Files ... 25
4 Converting schedules from previous versions ... 26
5 Dragging and dropping files ... 28
6 Using context menus ... 29
7 Navigating in the Views ... 29
8 Using the Project Information form ... 30
9 Using the ExpressDate pop-up calendar ... 31
10 Using the ExpressTime pop-up clock ... 32
11 Going to today ... 34
12 Defining font attributes for a selected item ... 35
13 Checking for spelling errors ... 35
14 Defining find and replace text ... 37
15 Setting a schedule password ... 39
16 Editing file properties ... 41
17 Using XML files with FastTrack Schedule ... 42
18 Effort Driven and Fixed Duration Scheduling ... 43

Chapter 4 Ranges 44

1 Working with ranges ... 44
2 Defining a range ... 44

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3 Applying a range 45
4 Editing a range 45
5 Deleting a range 46
6 Duplicating a range 47
7 The Master Range 47
8 The All Bars Range 48

Chapter 5 Options 49

1 Application Options 49
Accessing application options 49
Setting general application options 50
Setting date options 50
Setting time options 52
Setting number options 53
Setting editing options 54
Setting save options 55
Setting AutoArchive options 55
Setting update options 56
2 Document Options 56
Accessing document options 56
Setting project options 57
Setting general document options 59
Setting currency options 61
Setting tracking options 61
Setting QuickLook options 62
Setting document specific AutoArchive options 63
Setting privacy options 64

Chapter 6 The Timeline 64

1 Changing the timeline range 64
2 Changing the timeline units 65
3 Changing the schedule duration units 65
4 Changing the resource duration units 66
5 Resizing timeline columns 67
6 Formatting the timeline's gridlines 67
7 Using Shift Schedule 68
8 Shifting items in the timeline 69
9 Formatting datelines 70

Chapter 7 Rows 71

1 Working with rows 71
2 Selecting rows 72
3 Inserting rows 73
4 Entering Task and Resource Names 73
5 Outlining tasks 74

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6 Displaying outline levels ... 74
7 Collapsing tasks and resource sub-rows ... 75
8 Expanding tasks and resource sub-rows ... 76
9 Resizing rows ... 76
10 Moving rows ... 77
11 Showing and hiding rows ... 77
12 Showing and hiding resource sub-rows ... 78
13 Formatting rows in the Schedule View ... 79
14 Formatting rows by outline level ... 81
15 Changing the font attributes of rows ... 82
16 Formatting rows in the Resource View ... 83
17 Formatting summary bars ... 85
18 Auto-Fitting row height ... 86
19 Going to row number ... 87

Chapter 8 Columns 87

1 Working with columns ... 87
2 Schedule View Column Guide ... 88
3 Displaying columns ... 93
4 Hiding columns ... 94
5 Moving columns ... 95
6 Locking and unlocking columns ... 96
7 Using the column map ... 96
8 Changing the column name ... 97
9 Defining default values ... 97
10 Defining column summaries ... 99
11 Defining value lists ... 100
12 Using value lists ... 102
13 Entering and editing hyperlinks ... 102
14 Launching a file or URL address ... 104
15 Formatting the display of column data ... 104
16 Changing font attributes of column headings ... 105
17 Changing the font attributes of cells ... 106
18 Formatting font styles by outline level ... 107
19 Showing and hiding column headings ... 108
20 Using a work breakdown structure ... 109
21 Changing columns width ... 110
22 Auto-Fitting column width ... 110
23 Showing and hiding Action Columns ... 111
24 Using Action Columns ... 111

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Chapter 9 Task Bars & Milestones 112

1 Working with task bars and milestones ... 112
2 Drawing task bars and milestones ... 113
3 Dragging task bars and milestones ... 114
4 Typing dates to draw task bars and milestones ... 115
5 Changing a bar or milestone to a different style ... 116
6 Deleting a bar or milestone ... 116
7 Going to task bar ... 117
8 Formatting a bar and milestone style ... 117
9 Creating a new bar and milestone style ... 118
10 Editing an existing bar and milestone style ... 119
11 Understanding task bar constraints ... 120
12 Setting task bar constraints ... 122
13 Creating custom task bar point styles ... 122
14 Working with task bar labels ... 123
15 Defining activity bar alignment ... 125

Chapter 10 Progress Tracking 126

1 Task bar and milestone scheduled, baseline, and actual dates ... 126
2 Defining task bar and milestone scheduled dates ... 126
3 Defining task bar and milestone baseline dates ... 127
4 Defining task bar and milestone Actual dates and Percent Complete ... 128
5 Displaying task bar and milestone scheduled, baseline, and actual bar parts ... 129
6 Capturing task bar and milestone dates into baseline ... 131
7 Setting task bar andmMilestone dates from baseline ... 132
8 Progress tracking example ... 132

Chapter 11 Linking Task Bars 133

1 What is a task bars link? ... 133
2 Managing task bars links ... 134
3 Defining types of task bars links ... 136
4 Linking task bars ... 137
5 Unlinking task bars ... 137
6 Format the appearance of task bars links ... 138
7 Showing and hiding task bars links ... 140
8 Dragging linked task bars ... 140
9 Understanding Lead and Lag time ... 141

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Chapter 12 Critical Path 142
1 What is a critical path? 142
2 Critical path and bar priority 142
3 Formatting the display of a critical path 143
4 Showing and hiding the critical path 144
Chapter 13 Information Forms 145
1 Opening the Information form 145
2 Working in the Row tab of the Information form 146
3 The Bars>Tracking tab of the Information form 147
4 The Bars>Columns tab of the Information form 149
5 The Bars>Links tab of the Information form 150
6 The Bars>Assignments tab of the Information form 150
Chapter 14 Work Calendars 151
1 What is a work calendar? 151
2 Defining and editing a work calendar 152
3 Displaying a work calendar 154
4 Calculating task bar durations in work units 155
5 Dragging task bars using the work calendar 156
Chapter 15 The Calendar View 156
1 What is the Calendar View? 156
2 Formatting the Calendar View 157
3 Formatting the display of the calendar in the Calendar View 158
4 Formatting the display of bars in the Calendar View 159
5 Formatting text in the Calendar View 160
6 Formatting the display of bar labels in the Calendar View 161
7 Formatting the text of bar labels in the Calendar View 161
8 Formatting the appearance of gridlines in the Calendar View 162
9 Printing the Calendar View 164
10 Setting the Calendar View page options 164
Chapter 16 Resources and Assignments 166
1 Working with resources 166
2 Understanding the resource Information form 167
3 Creating resources 168
4 Creating and editing a resource work calendar 169

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5 Assigning resources to task bars 171
6 Understanding contours 173
7 Formatting row text in the Resource View 175
8 Formatting rows in the Resource View 176
9 Formatting graph data in the Resource View 178
10 Resource Assignments 179
11 Resource Assignment Spot Allocation 179
12 Resource Assignment Overtime 180

Chapter 17 Layouts 181

1 What is a Layout? 181
2 Defining a Layout 181
3 Deleting a Layout 183
4 Duplicating a Layout 183
5 Applying a Layout 184

Chapter 18 Reports 184

1 What is a Report? 184
2 Defining a Report 185
3 Deleting a Report 186
4 Duplicating a Report 186
5 Applying a Report 187

Chapter 19 Printing & Previewing 187

1 Working with Print Preview 187
2 Using Print Preview 188
3 Adding print headers and footers 189
4 Inserting page #, date, time, and file name 190
5 Adding titles and pictures to Print Preview 191
6 Fitting the document to a number of pages 192
7 Making a wall chart 193
8 Breaking printed pages at rows 194
9 Printing schedules 195
10 Choosing page options 196
11 Setting up the page 198
12 Exporting the page as a picture 198

Chapter 20 Filters & Sorts 200

1 Working with Filters and Sorts 200
2 Creating or editing Filters 201
3 Working with Schedule and Calendar View Filters 201

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4 Setting Filter options ... 202
5 Creating a column/value Filter ... 205
6 Creating a date/time Filter ... 206
7 Working with Resource View Filters ... 208
8 Deleting a Filter ... 209
9 Duplicating a Filter ... 210
10 Applying a Filter ... 211
11 Showing and hiding rows ... 212
12 Restoring hidden rows ... 213
13 Defining Sort criteria ... 213
14 Deleting a Sort ... 215
15 Duplicating a Sort ... 215
16 Applying a Sort ... 216
17 Restoring sorted rows ... 217

Chapter 21 Project Portfolio 218

1 Understanding the Project Portfolio ... 218
2 Combining files into a Portfolio ... 219
3 Portfolio management and work calendars ... 220
4 Working with a Portfolio master file ... 221
5 Updating a Portfolio master file ... 222

Chapter 22 Timescales 223

1 Working with timescale rows ... 223
2 Formatting timescale rows ... 223
3 Showing, hiding, and mirroring timescale areas ... 224
4 Inserting new timescale rows ... 225
5 Formatting timescale row units ... 225
6 Formatting timescale row gridlines ... 226
7 Changing the font attributes of timescale rows ... 227
8 Moving timescale rows ... 227
9 Changing the height of timescale rows ... 228
10 Changing the width of timescale & timeline-columns ... 228

Chapter 23 Summary Graphs 229

1 Showing and hiding Summary Graph rows ... 229
2 Inserting new Summary Graph rows ... 229
3 Deleting Summary Graph rows ... 230
4 Formatting Summary Graph rows ... 230
5 Choosing units for Summary Graph rows ... 231

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6 Choosing data to summarize in Summary Graphs ... 231
7 Choosing summary operations for Summary Graphs ... 232
8 Formatting the display of Summary Graph rows ... 233
9 Labeling Summary Graph rows ... 234
10 Changing the font attributes of Summary Graph rows ... 234
11 Moving Summary Graph rows ... 235
12 Changing the height of Summary Graph rows ... 235

Chapter 24 Alignment Grids 236

1 Showing and hiding the alignment grid ... 236
2 Using alignment grids ... 236
3 Defining alignment grids ... 237
4 Defining task bar alignment ... 238
5 Defining text box alignment ... 239
6 Defining picture alignment ... 240
7 Aligning items to grid ... 242
8 Snapping items to grid ... 242

Chapter 25 Calculations 243

1 Overview of using calculations ... 243
2 What is a calculation? ... 243
3 What are the elements of a calculation? ... 244
4 Defining a calculation column ... 245
5 Entering a calculation ... 245

Chapter 26 Importing and Exporting 247

1 Importing data ... 247
2 Inserting a picture ... 250
3 Exporting data ... 250
4 Exporting data as HTML ... 253
5 Exporting data as a Microsoft Project XML file ... 255
6 Exporting a picture ... 255

Chapter 27 Text Boxes, Pictures, & Legends 257

1 Working with text boxes, pictures, and legends ... 257
2 Bringing items to front ... 259
3 Sending items to back ... 259
4 Formatting items ... 260
5 Text Boxes ... 262
Adding text boxes ... 262
Editing text boxes ... 262

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Resizing text boxes ... 263
Moving text boxes ... 263
Changing the font attributes of text boxes ... 263
Adding pointers to items ... 264
Formatting pointers ... 265
6 Pictures ... 266
Adding pictures ... 266
Formatting items ... 267
Resizing pictures ... 269
Moving pictures ... 269
7 Legends ... 270
Inserting legends ... 270
Formatting legends ... 270
Moving legends ... 271
Resizing legends ... 272
Chapter 28 FastSteps 272
1 What are FastSteps? ... 272
2 Defining a new FastSteps sequence ... 273
3 Editing an existing FastSteps sequence ... 274
4 Deleting a FastSteps sequence ... 274
5 Duplicating a FastSteps sequence ... 275
6 Running an existing FastSteps sequence ... 275
Chapter 29 iCalendar Integration 276
1 Working with iCalendar files ... 276
2 Publishing schedules as iCalendar files ... 276
3 Unpublishing an iCalendar schedule ... 277
4 Importing iCalendar files ... 277
5 Import iCalendar Options ... 278
6 Exporting data as an iCalendar ... 278
7 Export iCalendar Options ... 278
8 Using the Schedule Publish Log ... 279
Chapter 30 Reference Information 280
1 Keyboard Shortcuts ... 280
2 Additional Help Resources ... 283
AEC Software support services ... 283
Online Help ... 283
3 Function Reference ... 284
Function Reference ... 284
Number Functions ... 285
Text Functions ... 285
Statistical Functions ... 286
Logical Functions ... 287
Date and Time Functions ... 287

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4 Operator Reference 288
Operator Reference 288
5 Comparison Operators 288
Comparison Operators 288
6 Requirements 290
Hardware and software requirements 290

Chapter 31 Glossary 290

1 Tasks 290
2 Bar 290
3 Milestone 290
4 Milestones 291
5 Start 291
6 Finish 291
7 Duration 291
8 Percent Complete 291
9 Scheduled Dates 292
10 Actual Dates 292
11 Work in Place 292
12 Component 292
13 Assignment sub-row 292
14 Percent Usage sub-row 292
15 Full Allocation Line 293
16 Usage Graph Scale 293
17 Schedule 293
18 Columns 293
19 Column Summaries 293
20 Rows 294
21 Timeline Graph 294
22 Graph 294
23 Gantt Chart 294
24 Chart 295
25 Timescale Areas 295
26 Timescale Rows 295
27 Datelines 295
28 Early Start or Finish 295
29 Timeline Units 296
30 Summary Graphs 296
31 Summary Bars 296
32 Bar Labels 296

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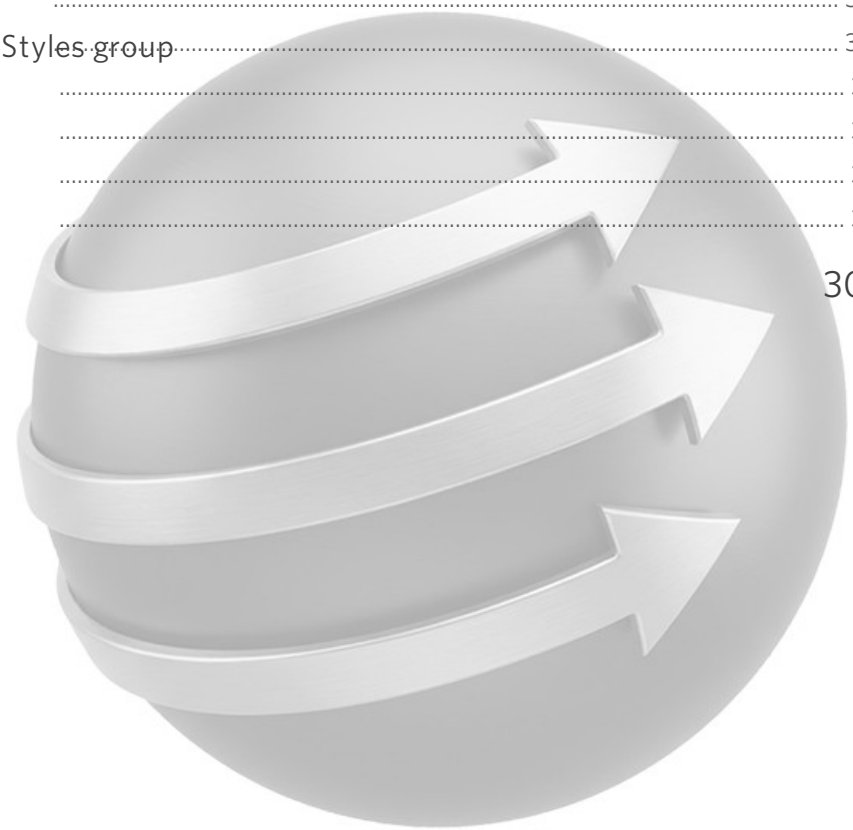
33 Project Hierarchies 296
34 Outline 297
35 Expanded 297
36 Collapsed 297
37 Bar Tracking Window 297
38 Dependent Tasks 297
39 Links 297
40 Linking 298
41 Chaining 298
42 Slipping 298
43 Slack 298
44 Context-Clicking 298
45 Cursor Tracking Area 299
46 Row Number Action Column 299
47 Expand/Collapse Action Column 299
48 Out of Range Days 299
49 Calendar Title 299
50 Text Boxes 300
51 Pictures 300
52 Legends 300
53 Pointers 300
54 Bar and Milestone Styles group 300
55 Arrow tool 301
56 Bar tool 301
57 Link tool 301
58 Text tool 301

Index 302



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1 What is FastTrack Schedule?

What is FastTrack Schedule 2026?

Click here if you experience problems viewing the help system.

FastTrack Schedule is a robust project management application for tracking all of your projects, activities, tasks, resources, costs, to-do lists, and deadlines.

FastTrack Schedule helps you organize, track, and manage your projects by graphically representing start and finish dates as bars along a timeline graph. Within project management, this type of schedule is known as a Gantt chart, named after its creator, Henry Gantt. FastTrack Schedule automates the Gantt chart, making it a dynamic timeline.

To enter an activity you can draw a bar directly on the timeline graph and have FastTrack Schedule enter the duration and dates for you, or you can enter the duration or the dates in columns and have FastTrack Schedule automatically draw the bar on the timeline graph.

In fact, everything you can do to a task bar can be done with your mouse and the tools in FastTrack Schedule Toolbars, or by editing values in columns. This flexibility allows you to concentrate on the tasks you are scheduling, instead of the act of scheduling those tasks.

In addition to extensive graphic capabilities and customizable features, FastTrack Schedule is also a powerful database. As you draw, resize, and move bars along the timeline graph, the program automatically updates start and finish dates, durations, dependencies, percent complete values, and costs. A large number of predefined data columns are available for use, along with hundreds of customizable columns that you can format for your specific data and calculations. FastTrack Schedule is designed to keep all of your project data in one, centralized repository.

There are three Views in FastTrack Schedule:

- The Schedule View
- The Calendar View
- The Resource View

Each view offers a specific set of functionality, though all Views are interrelated.

See also:

- The Tools
- The Bar and Milestone Styles
- The Timeline Range

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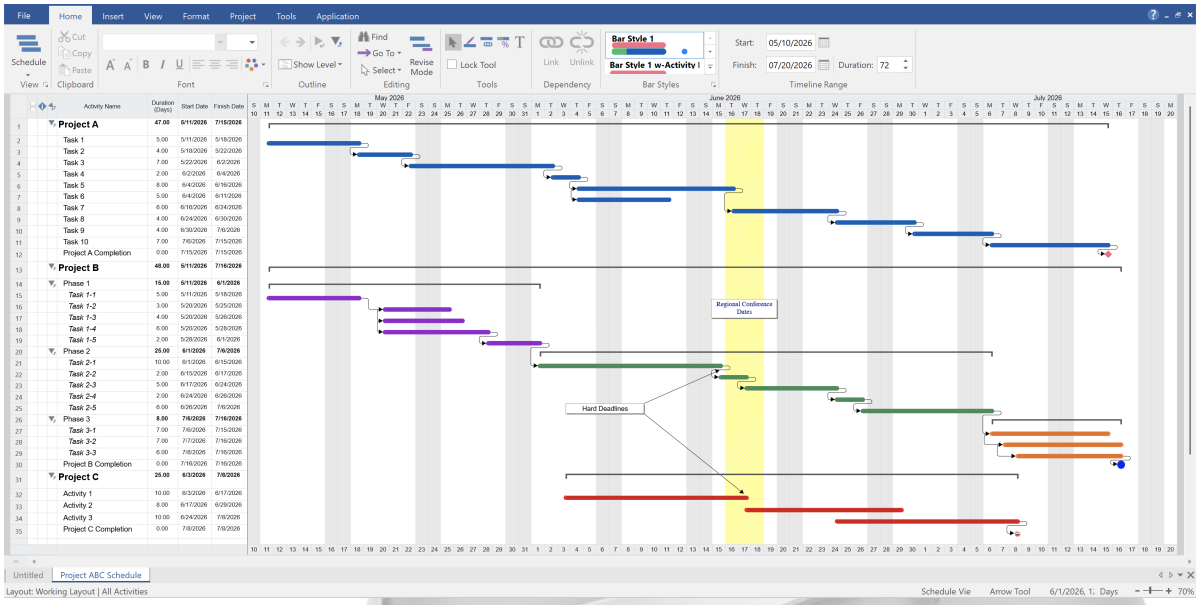
2 The FastTrack Schedule 2026 Environment

2.1 Views

2.1.1 The Schedule View

The Schedule View

The Schedule View is the primary View of FastTrack Schedule; all other Views support the Schedule View. In this View you can enter activities, create activity bars in the timeline graph, link bars, view critical paths, track the Scheduled, Baseline, and Actual dates and durations of your tasks, insert pictures, text boxes, and legends, create and view summary graphs, and much more. Most of your reports will be created in the Schedule View.



See also:

- The Tools group
- The Resource View
- The Calendar View

2.1.2 The Calendar View

The Calendar View

The Calendar View displays information from the Schedule View in the traditional look of a wall calendar. This allows you to view time vertically rather than horizontally, as you do in the Schedule and Resource Views. You can view and print completely customizable calendars

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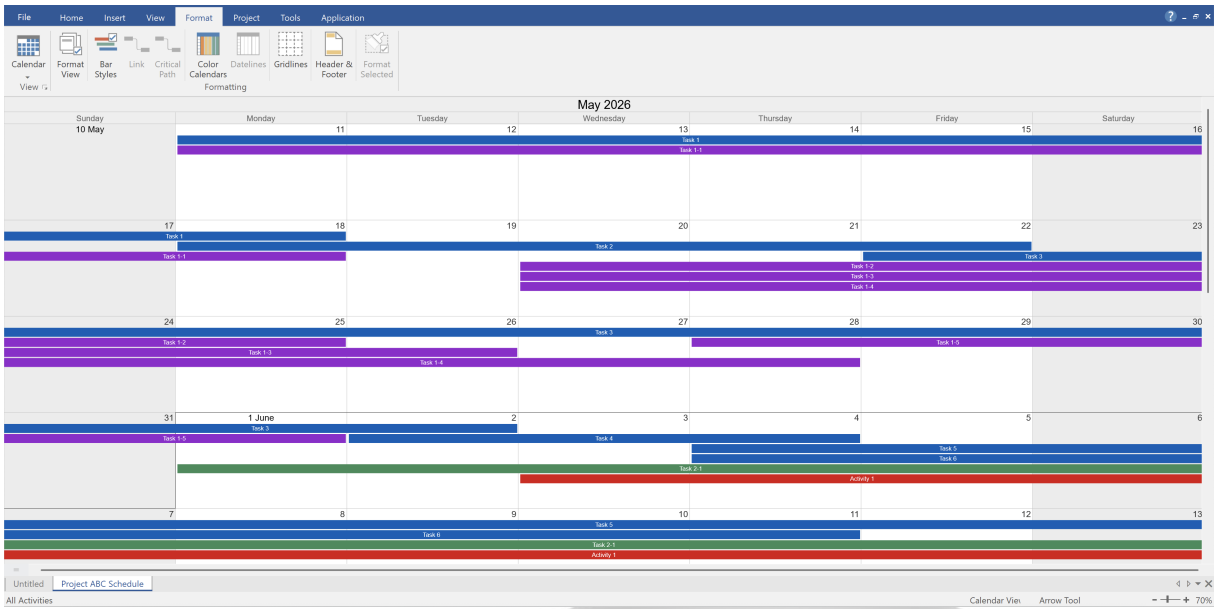
that can be filtered to display only those activities you want to see. The range of the Calendar View can be modified to view any number of contiguous weeks.

In the Calendar View you can draw, move, and hide task bars, filter activities (to view only those bars you want to see), edit Scheduled, Baseline, and Actual dates and durations, apply Ranges and FastSteps, and print the calendar in current, monthly, and custom configurations. Any updates made in the Calendar View will transfer to the Schedule and Resource Views.



See also:

- The Schedule View
- The Resource View

2.1.3 The Resource View

The Resource View

The Resource View tracks and manages resource information, assignments and usage. You can see exactly to which tasks your resources are assigned, what percentage of their total available time is being used, and how many hours they are working per task, project, or over a given period of time.

In the Resource View you can create and edit resources, configure resource calendars, and manage resource information including: costs/rates, contact information, resource notes, et cetera. You can also move bars in the timeline, and change the Scheduled, Baseline, and Actual dates of tasks; any updates made to these in the Resource View will carry over to the other two Views. Bars and resource tracking will only appear in the Resource View once the resources have been assigned to tasks in the Schedule View.

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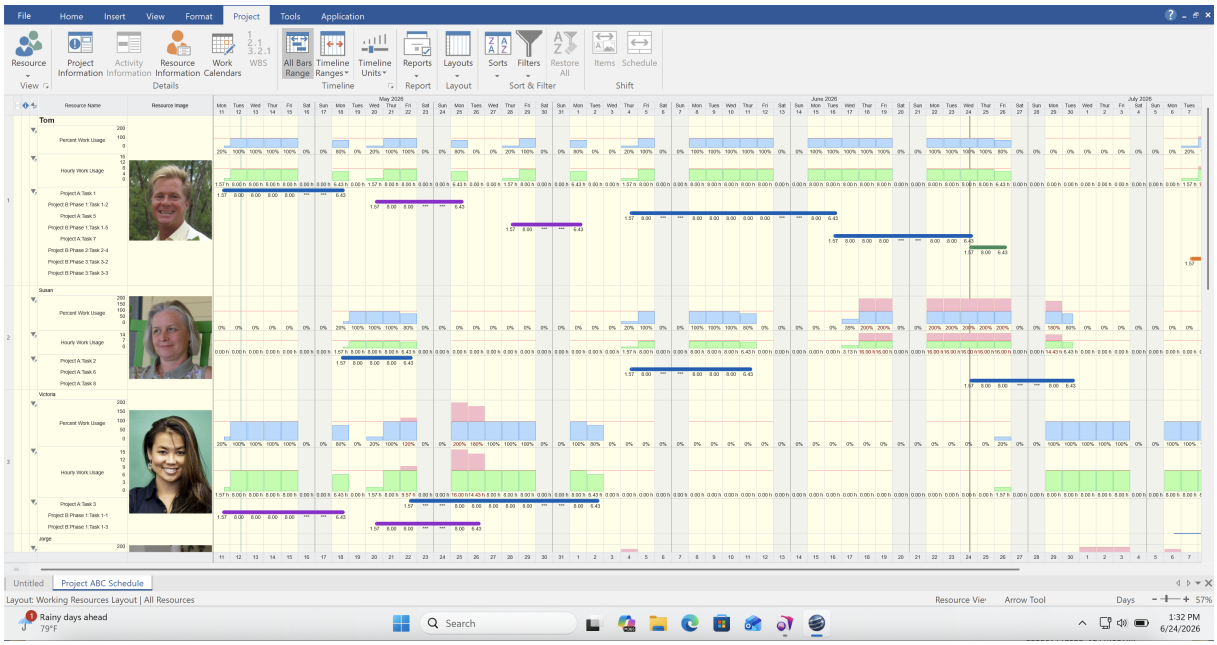

The Resource View allows you to track many resources in one window with colorful and dynamic bar graphs. You can collapse and expand the sub-rows to display only the information you need to see. You can easily determine when a resource has been over allocated or when it is available to be assigned more hours. You can also spot allocate resources.

See also:

- The Schedule View
- The Calendar View

2.2 Action Columns

2.2.1 Action Columns

Action Columns

Action Columns in FastTrack Schedule help streamline the process of working with the activities and resources in your projects. The Action Columns are displayed to the left of the columns in the Schedule and Resource Views. They simplify operations performed on rows, sub-rows, and outline levels.

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Row Number/Select Row
Clicking here selects the row for moving, deleting, copying, cutting, formatting, and hiding.

Page Break
Clicking here designates the corresponding row as the last row on a printed page.

Information Form
Clicking here opens the Information form in the Schedule View and the Resource Information form in the Resource View. Displays an icon if any task in the row has a special Work Calendar or if there are Notes.

Expand/Collapse
Clicking here collapses and expands outline levels in the Schedule View and sub-rows in the Resource View.

2.3 Toolbars and Format Bar

2.3.1 The Tools control

The Tools Control

FastTrack Schedule's Tools control holds five tools and a Lock feature. Unless a tool is locked, the default setting for each tool is to revert back to the Arrow Tool after use. When locked, a tool is preserved and can be used indefinitely until unlocked.

Arrow tool
The Arrow Tool is a general-purpose tool that selects, moves, and resizes items in all Views. When you want to drag a task bar, row, column or graphic item this is the tool you need to have selected.

Bar Tool
The Bar Tool allows you to draw task bars directly in the timeline graph. The default Constraint Type of these bars is "Start On Or After". The default is to draw a bar. To draw the

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Milestone associated with a bar, press the Command key on the keyboard and click and drag. The Milestone will appear on the upclick.

Link Bars Tool

The Bar Link Tool lets you draw links between bars to create dependencies (Predecessors/Successors). You can use this tool to draw all 4 link types: Finish to Start, Start to Start, Finish to Finish, and Start to Finish.

% Complete Tool

The % Complete Tool defines the percent complete value of a task. To define this you click and drag on the task bar to the desired level. Actual start, finish, and duration values for that task are automatically calculated by the value inputted.

Text Tool

The Text Tool allows you to create and edit text boxes for use as labels, notes, and titles.

Tool Locking

The Tool Locking locks in place the selected tool until it is unlocked.

Note:
Selecting a tool changes the appearance and purpose of the mouse cursor. Each tool has its own operations and, while a tool is selected, clicking and dragging the mouse performs those operations.

See also:

- The Schedule View
- The Resource View
- The Calendar View
- The Bar and Milestone Style group
- The View group
- The Timeline Range

2.3.2 The Bar Styles group

The Bar and Milestone Styles Group

The cells of the Bar and Milestone Styles control contain the Bar and Milestone Styles defined for this schedule. The selected Bar and Milestone Style will be applied to all new bars created. If an already created bar is selected when you choose a new Bar and Milestone Style, that bar will change to the newly selected Bar and Milestone Style.

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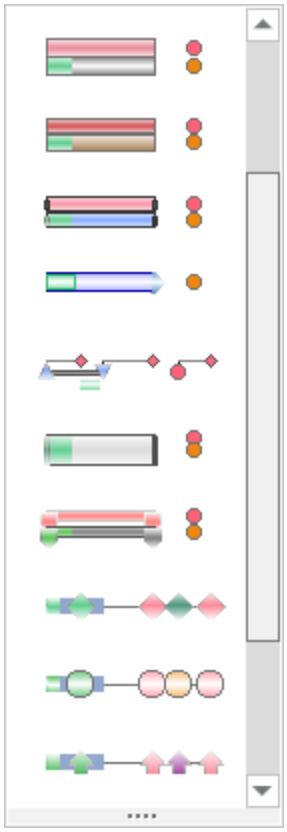
Milestone Styles are also available in this control. These styles can apply to Milestone activities with a duration of zero.

Selecting the Bar Styles option from the Format menu opens the Format Bar Styles dialog. In this dialog you can design a new Bar or Milestone style or edit an existing Bar or Milestone Style.



See also:

- The Schedule View
- The Resource View
- The Calendar View
- The Tools group
- The View group
- The Timeline Range

2.3.3 The Views group

The Views Group

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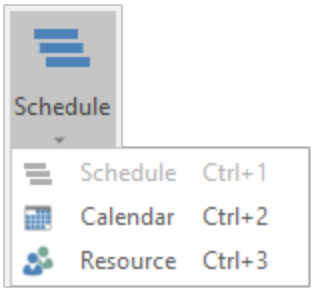
There are three Views in FastTrack Schedule: the Schedule View, Calendar View, and Resource View. The View buttons allow you to switch from one View to another instantly.



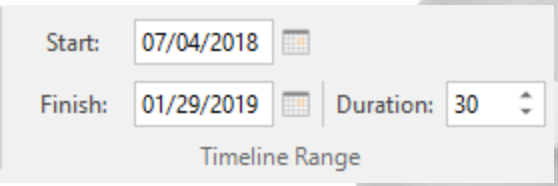
See also:

- The Schedule View
- The Resource View
- The Calendar View
- The Tools group
- The Bar and Milestone Style group
- The Timeline Range

2.3.4 The Timeline Range

The Timeline Range

The Schedule, Resource, and Calendar Views can each show a different span, or range, of dates. The Timeline Range gives you immediate access to the Start and Finish dates of the timeline in the Schedule and Resource Views, and the calendar in the Calendar View.



The dates you set in the Timeline Range affect only the View you are currently working with and always correspond to the Start and Finish dates displayed in the respective Format Schedule, Format Resource, or Format Calendar View dialogs.

You can also use:

- All Bars Range button to display the timeline in a range that encompasses every bar. The range will be automatically set to start at the beginning of your first task bar, and end at the conclusion of your last task bar.
- Go To Bar to take you to the first bar in a selected row. From the Home tab, on the Edit group, click Go To and select Bar.
- Timeline Units button to quickly change the units in which the timeline displays.

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See also:

- The Schedule View
- The Resource View
- The Calendar View
- The Tools group
- The Bar and Milestone Style group
- The View group

3 Schedule Files

3.1 Opening a schedule

Opening a Schedule

When opening a schedule in FastTrack Schedule you have three options: opening a new schedule, opening an existing schedule, or opening a Template.

Opening a Template allows you to create a schedule based on an existing schedule or framework. You select the schedule to use as a Template, decide what information you want to keep for the new schedule, and then generate the new schedule.

To create a new schedule file:

1. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select New.
   The Getting Started dialog opens.
2. Click New Schedule.

To retrieve an existing schedule file:

1. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Open.
   The Open dialog opens.
2. Navigate to the location of the schedule you want to open and select it.
3. Click Open.

To open a schedule file template:

1. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select New.
   The Getting Started dialog opens.
2. Click New Schedule From Template.
   The Templates and Examples dialog opens.

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3. Choose an application-defined template from the table or click the Browse button to locate a FastTrack Schedule file on disk.
   The Open Template Options dialog opens.
4. From the drop-down list at the top of the dialog, select from the data options.
   Keep Everything is the default option, but in the same drop-down list you can select Keep the Following Data or Remove all Data which opens a completely blank schedule whose columns mirror the schedule you used as a template.
5. If you have selected to Keep the Following Data, decide which elements of that schedule you want to keep by selecting and/or clearing options from the Schedule, Resource, and Calendar tabs.
6. Click OK to apply your changes and close the Open Template Options dialog.

Note:
Schedules built in Version 10 can be opened automatically in FastTrack Schedule 2026. Once opened they permanently convert to a 2020 file. If you have a schedule built with an earlier version than 10, please contact technical support.

See also:
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Navigating in the Views
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Going to today
- Defining font attributes for a selected item
- Checking for spelling errors
- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

3.2 Saving a schedule

Saving a Schedule

Saving a schedule records all of the changes you have made to the file.

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To save a schedule file:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Save.
   If this is a new, unsaved schedule, you are asked to name the file and choose the location where it will be stored.
   Don't forget to enter data into the Properties dialog.

To save the schedule file with a new name and/or location:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Save As.
2. In the dialog, enter a new name and/or location for the schedule.

See also:
- Opening a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Navigating in the Views
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Going to today
- Defining font attributes for a selected item
- Checking for spelling errors
- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

3.3 Converting Mac Schedule Files to Windows Schedule Files

Converting Mac Schedule Files to Windows Schedule Files

Converting a file means you can open, use, and save a file built in FastTrack Schedule for Mac® on a machine running FastTrack Schedule for Windows® or vice versa.

Important:
Before you convert a schedule to another platform, be sure to save a copy of it with another name to your hard drive. When you open schedules across platforms (Windows to Mac or vice versa), graphics will be lost.

To convert a Mac file to a Windows file:

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1. In the Windows version of FastTrack Schedule, Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, then select Open. The Open dialog opens.
2. Select the name of the file to be converted.
3. Click Open.
4. With the converted file open, from the File menu, select Save As.
5. Enter a new name and/or location for the file and click OK.
   This saves the schedule in a new name or location, converting it to the current platform. Entering a new name and/or location preserves the original file in its native format.

Notes:
- For a schedule built with the Mac version of FastTrack Schedule, the Mac file must be saved with the ".fts" extension, for example "schedule.fts."
- Because of differences in the fonts available for Windows and Mac, some text may appear differently across platforms. The computer operating system automatically makes font substitutions.

See also:
- Opening a schedule
- Saving a schedule
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Navigating in the Views
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Going to today
- Defining font attributes for a selected item
- Checking for spelling errors
- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

3.4 Converting schedules from previous versions

Converting Schedule Files Built with a Previous Version

Schedules built with FastTrack Schedule Version 10 or later can be easily converted and opened in FastTrack Schedule 2026. Schedules that were built with versions of FastTrack

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Schedule earlier than Version 10 cannot be directly converted. You can contact AEC Software Technical Support for assistance with these older files.

To convert an existing Version 10 schedule file:
1. Launch FastTrack Schedule 2026.
2. In FastTrack Schedule 2026, start Backstage with the File tab at the top left of the FastTrack Schedule window, select Open.
3. Open the file that you wish to convert to Version 2026.
4. To convert the file to Version 2026, select Save As from the File menu and save the file under a new name or in a new location.

After a schedule is converted, it can no longer be opened in the older version of FastTrack Schedule.

If you are attempting to convert a file before Version 10, FastTrack Schedule will display an alert that the file was created with a version of the application whose files are no longer supported. Click OK and call AEC Software Technical Support.

Important:
You can contact AEC Software Technical Support at (703) 450-2318 or email support@aecsoftware.com.

See also:
- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Navigating in the Views
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- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Going to today
- Defining font attributes for a selected item
- Checking for spelling errors
- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

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3.5 Dragging and dropping files

Dragging and Dropping Schedule Files

You can automatically open dropped FastTrack Schedule files by dragging them onto the FastTrack Schedule icon in the Dock. You can also paste the full path name of any file into a text box.

To drag and drop a FastTrack Schedule file:
1. Select a FastTrack Schedule file from outside the application, position the cursor in the FastTrack Schedule application window, and then release the mouse button.
   This opens the dropped schedule file in FastTrack Schedule and shows the View in which that file was last saved.

To drag and drop a file name:
1. Select a file and, holding down the mouse button, position the cursor over a text box in the timeline, and then release the mouse button.
   If you have dropped a file, this pastes the full file name and path into the text box over which the cursor is positioned. For example, if you dropped a file called ‘letter’ from Microsoft Word, it would paste ‘letter.doc' into the text box.

Note:
See the instructions provided with your operating system for more information on dragging and dropping files.

See also:
- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Using context menus
- Navigating in the Views
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Going to today
- Defining font attributes for a selected item
- Checking for spelling errors
- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

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3.6 Using context menus

Using Context Menus

A context menu is the pop-up menu that appears when you click the mouse while pressing the Control key. This pop-up menu contains a list of context-specific shortcuts or operations that you can perform on the item. If your mouse has a right button, then right-clicking will access the context menu.

It is always a good idea to right-click an item to see what context menu options are available.

See also:

- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Navigating in the Views
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Going to today
- Defining font attributes for a selected item
- Checking for spelling errors
- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

3.7 Navigating in the Views

Navigating in the Views

There are various methods for moving your cursor within the columns of the Schedule View or Resource View. First and foremost, you can always use your mouse to click in a cell or move to other cells/columns. To move your cursor a column to the right or left you can use the Right and Left Arrow keys on your keyboard. You can also use the Tab key to move right, but be sure that your cursor is to the right of any text in the Activity Name column. Pressing the Tab key if the cursor is on the left of the text, or if no text is entered yet, will move that activity in one activity outline level.

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To move up or down a row, you can use the Up or Down Arrow keys on your keyboard. For all columns, except those that contain text stored by row (such as the Activity Name column), you can press the Enter/Return key to move your cursor down a row. Pressing the Return key in a column formatted to save data by row will take you to the next line in that cell.

See also:

- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
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- Checking for spelling errors
- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

3.8 Using the Project Information form

Using the Project Information Form

The Project Information form is where you set the project work calendar, define the project's start date and time, setup the status date and updates, and set the Active Baseline. This form is a good place to start when creating a schedule because you can define the "foundational" elements of your schedule before starting data entry.

The "project" is a subset of the data in your schedule determined by your definition of the Start Date. Thus, there can be data scheduled before the Project Start date.

To set the Project Calendar:

1. From the Calendar drop-down list, select Standard (8 AM - 5 PM Monday-Friday), 24 Hour, Night Shift, one of the other default calendars included with the software, or the name of a custom work calendar you have created. Individual activities and resources can have their own work calendars which you will setup separately of this overall, project work calendar

To define the Project Start Date:

1. From the Project menu, select Project Information.
   The Project Information dialog opens.

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2. Use the controls to set the Project Start Date and Time.
3. Click OK to close the form.
   The Project Start Date dateline will now display as a vertical line in the timeline on the date and time you have specified.

See also:

- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Navigating in the Views
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Going to today
- Defining font attributes for a selected item
- Checking for spelling errors
- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

3.9 Using the ExpressDate pop-up calendar

Using the ExpressDate Pop-Up Calendar

The ExpressDate™ pop-up calendar allows you to enter a time quickly with a series of mouse clicks. When you click in any date column a button appears in the cell that gives you double-click access to the pop-up calendar.

To open the ExpressDate calendar:

1. Double-click in one of the cells of the column that you or the application have defined to have a date value (e.g. Start Date, Finish Date, etc.).
   A button will appear in the top right corner of the cell.
2. Click the button to open the ExpressDate calendar.
   -or-
   Ctrl-click in a column cell and select ExpressDate Calendar from the context menu.

To close ExpressDate without making a selection:

1. Click the Cancel button.
   -or-
   Press the Escape key.

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To select a value from the ExpressDate calendar:
1. Click the top set of arrows to move backward or forward in years.
2. Click the bottom set of arrows to move forward or back in months.
   The dialog displays the calendar for that month and year.
3. Click on a day in the calendar.
4. Click OK to enter the date or click Cancel to close the calendar without entering the date.

Notes:
- The ExpressDate only opens in column cells that are formatted to contain date data or plain text.
- ExpressDate opens with the cell's existing date value displayed.
- If there is no value in the cell, ExpressDate opens with the current date displayed.

See also:
- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Navigating in the Views
- Using the Project Information form
- Using the ExpressTime pop-up clock
- Going to today
- Defining font attributes for a selected item
- Checking for spelling errors
- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

3.10 Using the ExpressTime pop-up clock

Using the ExpressTime Pop-Up Clock

The ExpressTime™ pop-up clock allows you to enter a time quickly with a series of mouse clicks. When you click in any time columns a button appears in the cell that gives you double-click access to the pop-up clock.

To open the ExpressTime clock:

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1. Click in one of the cells of a column that you or the application have defined to have a time value (e.g. Start Time, Finish Time, etc.).
   A button will appear in the top right corner of the cell.
2. Click the button to open the ExpressTime™ clock.
   -or-
   Ctrl-click the column cell and select ExpressTime Clock from the context menu.

To close ExpressTime without making a selection:
1. Click Cancel.
   -or-
   Press the Escape key.

To select a value from ExpressTime clock:
1. Use the hour and minute drop-down lists to select numerical values.
   -or-
   Use the back and forward buttons to change the time in one-minute increments.
   -or-
   Click and drag the hands of the clock until it shows the desired time.
2. In 12-hour mode, select AM, PM, or Mid (midnight) from the drop-down list.
3. Click OK to enter the time indicated in the ExpressTime pop-up clock window into the appropriate cell.
   -or-
   Click Cancel to close the ExpressTime clock without entering a time.

Notes:
- The ExpressTime clock only opens in column cells that are formatted to contain time data or plain text.
- ExpressTime opens with the cell's existing time value displayed. If there is no value in the cell, ExpressTime opens with the current time displayed.
- The default format for hours in the clock, and throughout the application, is set in the Times tab of the Preferences dialog.

See also:
- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Navigating in the Views
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Going to today
- Defining font attributes for a selected item
- Checking for spelling errors

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- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

3.11 Going to today

Going to Today

This command scrolls the Schedule, Calendar or Resource View to display the current day, as defined by your operating system.

To scroll to today:

1. On the Home tab, in the Editing group, click Go To and choose Today from the drop-down list.
   -or-
   Use the keyboard shortcut, Control + T

See also:

- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Navigating in the Views
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Defining font attributes for a selected item
- Checking for spelling errors
- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

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3.12 Defining font attributes for a selected item

Defining Font Attributes of a Selected Item

Most elements of, or items in, a schedule can be selected. Once something is selected you can define the font attributes of that individual value, heading, text box, cell, etc.

To define font attributes for a selected item:
1. Using the Arrow tool, select an element of the schedule.
2. On the Home tab, in the Font group, use the options to format the selected items' font.

-or-

1. Right-click the item and choose Font from the context menu
2. Use the options in the Font dialog to format the item's font

See also:

- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Navigating in the Views
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Going to today
- Checking for spelling errors
- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

3.13 Checking for spelling errors

Checking for Spelling Errors

FastTrack Schedule allows you to check for spelling errors in visible columns, text boxes, or within each View.

To check for spelling errors:
1. On the Tools tab, in the Proofing group, click the icon at the top of the group to check text in the entire schedule.

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-or-
On the Tools tab, in the Proofing group, click the word Spelling and choose Check All, Check Columns, Check Text Boxes, or Check Selected Text – whichever fits your needs. The Spelling dialog opens with the first unrecognized word displayed in the Not in Dictionary box.

2. Select from the options described below.

This Option:		Does This:
Ignore		Leaves the word in the Not in Dictionary box unchanged in the schedule.
Ignore All		Leaves every occurrence of the word in the Not in Dictionary box unchanged.
Change		Replaces the word in the Not in Dictionary box with the selected word in the Change To box.
Change All		Replaces every occurrence of the word in the Not in Dictionary box with the selected word in the Change To box.
Add		Adds the word in the Not in Dictionary box to the User Dictionary so that it will not be selected as a misspelled word in the future.
Suggest		Lists possible replacements for the word in the Not in Dictionary box.
Options		Opens the Spelling Options dialog which allows you to select whether or not to: -Add or delete words from the User Dictionary. Click a row in the User Dictionary table to add a word. Select a word and press the Delete key to delete a word. -Ignore words in all uppercase lettering. -Ignore words with unusual capitalization. -Ignore words with numbers. -Find two occurrences of the same word in a row. -Enable the suggestions feature to split words. -Supply a drop-down list of possible replacements for the word in the Not in Dictionary box without requiring you to click the Suggest button.

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3. Click Close to close the Spelling dialog.

Notes:
- Only what is visible is spell checked.
- You can open the Spelling Options dialog anytime by, from the Tools menu, selecting Spelling and choosing Spelling Options from the submenu.
- Words that are ignored or added to the User Dictionary are saved by the application per user. They are applied to all future spell checks in all schedules.

See also:
- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
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- Using context menus
- Navigating in the Views
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Going to today
- Defining font attributes for a selected item
- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

3.14 Defining find and replace text

Defining Find and Replace Text

You can search for and replace text using the Find/Replace dialog. For instance, you could look for all occurrences of the word, "Begin" and replace them with "Start."

1. On the Home tab, in the Editing group, click Find.
   The Find/Replace dialog opens.
2. In the Find What box, enter the text for which you would like to search.
3. In the Replace With box, enter the text that will replace the selected (Find) text.
4. From the Find When Cell/Text Box drop-down list, select one of the following.

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To find only if:		Select:
Part of the cell equals Find text		Contains
Start of the cell equals Find text		Starts With
End of the cell equals Find text		Ends With
Whole cell equals Find text		Is

5. Select from the check boxes below.

To do this:		Select:
Find if in upper or lower case		Ignore Case
Find if part of a word		Whole Word (not selected)
Find if standing alone		Whole Word (selected)
Continue from the end of the schedule		Wrap-Around
Search columns		Search in Data Cells
Search selected column only		Search In Selected Columns Only
Search text boxes		Search in Text Boxes

6. Click Find Next to begin the search and close the Find/Replace dialog.

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Notes:

- Selected Columns Only is only available when you select a column heading or cell before opening the dialog.
- Search in Text Boxes is only available when the schedule contains one or more text boxes.
- To replace all occurrences of the Find text without viewing each one, click the Replace All button. This action cannot be undone. You may want to save the document before selecting Replace All.

See also:

- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Navigating in the Views
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Going to today
- Defining font attributes for a selected item
- Checking for spelling errors
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

3.15 Setting a schedule password

Setting a Schedule File Password

Assigning a password to a schedule file is used to control the access users have to that schedule.

To assign a password to a file:

1. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Prepare and choose Restrict Access.
   The Set File Password dialog opens.
2. Select from the options described below.

This Option:		Does This:

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Password		Defines the string of characters for the password. The password is case-sensitive and can be a maximum of 12 characters, including spaces and punctuation.
Do Not Allow Others Any Access		Users without the password will not be able to open the schedule in FastTrack Schedule.
Allow Others Read Only Access		Users without the password will be able to open the schedule file, but they will not be able to save changes.
Allow Others Read/Write Access		Users without the password will be able to open the schedule file and save changes, but they will not be able to change the password.

3. Click OK to apply your changes and close the Set File Password dialog. The Confirm Password dialog appears.
4. Enter the password in the Password box.
5. Click OK to close the Confirm Password dialog.

Notes:

- When a user opens a file with a password assigned to it, they are presented with a dialog requesting the password. If the file is set to allow read only access, they can open the file by clicking the Open as Read Only button.
- **Security note –** data is not encrypted. The password applies only to opening files in FastTrack Schedule.

See also:

- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Navigating in the Views
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Going to today

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- Defining font attributes for a selected item
- Checking for spelling errors
- Defining find and replace text
- Editing file properties
- Using XML files with FastTrack Schedule
- Effort Driven and Fixed Duration Scheduling

3.16 Editing file properties

Editing Schedule File Properties

The Properties dialog stores meta-data, or self-referential data, about a FastTrack schedule file. This meta-data is searchable using various OS level search tools.

Most of the data in the properties dialog is static, but some key data can be entered and edited by the user.

To edit file properties:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Prepare and choose Properties to open the Properties dialog.
2. In the Summary tab, enter or edit as much of the requested data as you would like.

Note:
- You can determine how much of a file's property data is exposed by changing the Privacy settings for the file.

See also:

- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Navigating in the Views
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Going to today
- Defining font attributes for a selected item
- Checking for spelling errors
- Defining find and replace text
- Setting a schedule password

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» Using XML files with FastTrack Schedule
» Effort Driven and Fixed Duration Scheduling

3.17 Using XML files with FastTrack Schedule

Using XML Files with FastTrack Schedule

When managing projects, it may be helpful to open data from other applications or export data from the application in which you are working. XML, which stands for Extensible Markup Language, is a text format designed to simplify the exchange of data between applications and on the Web.

There are many benefits to opening and saving files in the .XML extension. In addition to the transfer of raw data: date and time formats, the work calendar, outline levels, and links are also preserved. XML does not capture font attributes (for example: font color, font size, bar and milestone styles, etc.).

Microsoft Project 2010, 2013, 2016 and 2019 recognize the XML file format.

FastTrack Schedule supports MS Project XML.

See also:

» Opening a schedule
» Saving a schedule
» Converting Mac Schedule Files to Windows Schedule Files
» Converting schedules from previous versions
» Dragging and dropping files
» Using context menus
» Navigating in the Views
» Using the Project Information form
» Using the ExpressDate pop-up calendar
» Using the ExpressTime pop-up clock
» Going to today
» Defining font attributes for a selected item
» Checking for spelling errors
» Defining find and replace text
» Setting a schedule password
» Editing file properties
» Effort Driven and Fixed Duration Scheduling

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3.18 Effort Driven and Fixed Duration Scheduling

Effort Driven and Fixed Duration Scheduling

There are three values considered in the scheduling of a task: 1) the duration of the task, 2) the percentage of resource effort (be it human, equipment, material, etc.) assigned to a task and 3) the total work - which is initially derived by multiplying the Duration by the Percent Effort or can be entered by the user.

When a task is Effort Driven, FastTrack Schedule keeps the total work constant. Changes to resource assignments, and thus percentage of effort, impact the duration of the task and not the total work.

Effort Driven scheduling truly begins when you assign additional resources to a task. At the initial creation, every task has some value as its total work. Even if you don't explicitly assign a resource at the time of the task bar's creation, a default value of 1 unit of 100% effort is implicit to the task. When you do explicitly assign that first resource, it simply puts a name to the resource giving that initial default 100% effort. When you begin assigning additional resources, the bar's Duration is affected as you share the effort while keeping the total work being done on that task constant.

You can also tag a task as Fixed Duration. You do this in the Bars tab of a task's Information form. Task's designated as Fixed Duration, will keep their Duration unchanged, unless the task is Effort Driven, in which case, when assignments are changed, the Fixed Duration nature is overridden in order to keep the task's total work constant.

If you de-select the Apply Effort Driven Scheduling option in the Bars>Assignments tab of a task's Information form, the Duration will be kept constant.

You can determine the default setting for all three task values in the Project tab of the Document Preferences dialog, and you can change scheduling settings to all bars in the General tab of the Document Preferences dialog.

See also:

- Opening a schedule
- Saving a schedule
- Converting Mac Schedule Files to Windows Schedule Files
- Converting schedules from previous versions
- Dragging and dropping files
- Using context menus
- Navigating in the Views
- Using the Project Information form
- Using the ExpressDate pop-up calendar
- Using the ExpressTime pop-up clock
- Going to today

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- Defining font attributes for a selected item
- Checking for spelling errors
- Defining find and replace text
- Setting a schedule password
- Editing file properties
- Using XML files with FastTrack Schedule

4 Ranges

4.1 Working with ranges

Working With Ranges

Ranges are a saved span of dates. They can be changed at any time to determine what days you see in the schedule timeline and the calendar. You can access them easily from either the Ranges button on the toolbar or the Timeline Ranges sub-menu of the Project menu. Ranges can be applied to each View or all Views at once.

See also:

- Applying a range
- Defining a range
- Editing a range
- Deleting a range
- Duplicating a range
- The Master Range
- The All Bars Range

4.2 Defining a range

Defining a Range

Ranges can be created in the Define Range dialog.

1. On the Project tab, in the Timeline group, click Timeline Ranges, and choose Define from the drop-down list.
   The Ranges dialog opens.
2. Click New.
3. In the Define Range dialog, enter a name for the range.
   Each range must have a unique name.
4. Set the dates of the range by choosing between today (plus or minus a given number of days), the current week, the current month, or a custom span of dates.
5. Choose to apply the range to only the Current View or All Views.
6. Click OK to apply your changes and close the Define Range dialog.

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7. Click OK to apply your changes and close the Ranges dialog.
   -or-
   Click Close if you do not want to apply the selected range at this time.
   The range is saved for future use.

Note:
- Dates entered in the Timeline Range control are temporary and are not saved in the Ranges dialog until you follow the steps described above to define them as a saved range or Master Range.

See also:
- Applying a range
- Editing a range
- Deleting a range
- Duplicating a range
- The Master Range
- The All Bars Range

4.3 Applying a range

Applying a Range

When you apply a range, the timeline and/or calendar adjusts to display only the dates defined by the range.

To apply a range:
1. On the Project tab, in the Timeline group, click Timeline Ranges and choose the desired range from the drop-down list.

See also:
- Defining a range
- Editing a range
- Deleting a range
- Duplicating a range
- The Master Range
- The All Bars Range

4.4 Editing a range

Editing a Range

Ranges can be adjusted in the Define Range dialog.

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To edit a range:
1. On the Project tab, in the Timeline group, click Timeline Ranges and choose Define from the drop-down list.
   The Ranges dialog opens.
2. Click to select the name of the range you want to edit.
3. Click the Edit button.
4. In the Define Range dialog, use the options to edit the range.
5. Click OK to save your changes and close the Define Range dialog.
6. Click OK to apply your changes and close the Ranges dialog.
   -or-
   Click Close to close the dialog without applying the newly edited range.
   The range will be saved for later use.

See also:
- Applying a range
- Defining a range
- Deleting a range
- Duplicating a range
- The Master Range
- The All Bars Range

4.5 Deleting a range

Deleting a Range

Ranges can be deleted in the Ranges dialog.

To delete a range:
1. On the Project tab, in the Timeline group, click Timeline Ranges and choose Define from the drop-down list.
   The Ranges dialog opens.
2. Select the range you wish to delete.
3. Click the Delete button.
   A confirmation dialog appears asking you to verify that the range will be deleted.
4. Click OK to delete the range or Cancel to retain the range.
   If you delete the range, it will no longer be available from the Ranges Toolbar or Ranges submenu.
5. Click OK to close the Ranges dialog and apply the currently selected range.
   -or-
   Click Close to close the Ranges dialog without applying a range.

See also:
- Applying a range
- Defining a range

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» Editing a range
» Duplicating a range
» The Master Range
» The All Bars Range

4.6 Duplicating a range

Duplicating a Range

Ranges can be duplicated in the Ranges dialog.

To duplicate a range:
1. On the Project tab, in the Timeline group, click Timeline Ranges and choose Define from the drop-down list.
   The Ranges dialog opens.
2. Select the range you wish to duplicate.
3. Click the Duplicate button.
   The Define Range dialog opens.
4. Edit the new range.
5. Click OK to save the new range and close the Define Range dialog.
6. Click OK to close the Ranges dialog and apply the currently selected range.
   -or-
   Click Close to close the Ranges dialog without applying a range.

See also:

» Applying a range
» Defining a range
» Editing a range
» Deleting a range
» The Master Range
» The All Bars Range

4.7 The Master Range

The Master Range

The Master Range is designed to give you a quick way to return your file to a user-defined default range. Each file has a unique Master Range. When you apply the Master Range it is applied to every View in the current file. It can be changed at any time, in any View, to change the data shown in the schedule timeline or calendar.

The Master Range is initially set to consist of the dates shown in a file's Timeline Range when the file is first opened. Once you explicitly define the Master Range as a specific set of dates, it will remain defined as those dates until you redefine it. The Master Range is simply a range of dates.

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To set the Master Range:
1. On the Project tab, in the Timeline group, click Timeline Ranges and select Set Range from the drop-down list.
   The Format Schedule View, Format Resource View, or Format Calendar View dialog opens in the Range tab.
2. Enter or select the Start and Finish dates.
3. Select the Save Range as the Master Range checkbox.
   -or-
1. On the Project tab, in the Timeline group, click Timeline Ranges and select Define from the drop-down list.
   The Ranges dialog opens.
2. Select Master Range from the Ranges table and click Edit.
   The Define Range dialog opens.
3. Enter the start and finish dates you want to define as the Master Range.
4. Click OK to apply your changes and close the Define Range dialog.
5. Click OK to apply the Master Range and close the Ranges dialog.
   -or-
   Click Close if you do not want to apply the Master Range at this time.
   The Master Range setting is saved for future use.

To apply the Master Range:
1. On the Project tab, in the Timeline group, click Timeline Ranges and select Master Range from the drop-down list.

See also:
- Applying a range
- Defining a range
- Editing a range
- Deleting a range
- Duplicating a range
- The All Bars Range

4.8 The All Bars Range

The All Bars Range

Applying the All Bars Range automatically adjusts the timeline and/or calendar to begin on the Start Date/Time of the earliest task and end on the Finish Date/Time of the latest task immediately giving you a view of every bar and milestone in your schedule.

To apply the All Bars Range:
1. On the Project tab, in the Timeline group, click All Bars Range.

See also:
- Applying a range

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- Defining a range
- Editing a range
- Deleting a range
- Duplicating a range
- The Master Range

5 Options

5.1 Application Options

5.1.1 Accessing application options

Accessing Application Options

Setting application preferences defines the general operation; global formatting of dates, times, and numbers; and the editing, automatic saving, archiving and updating settings of every FastTrack Schedule file created thereafter.

To access application options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, and then Application Options.
The FastTrack Schedule Options dialog opens.

3. Select one of the following tabs:
- General
- Dates
- Time
- Numbers
- Editing
- Save
- AutoArchive
- Update

4. Use the options in the dialog to set your preferences then click OK to close the dialog and apply your preferences.

Note:
Saving a file as a template keeps both the per-Application and per-Document preference settings of the original file.

See also:
- Setting document preferences

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» Setting general preferences
» Setting date preferences
» Setting time preferences
» Setting number preferences
» Setting editing preferences
» Setting save preferences
» Setting auto-archive preferences
» Setting update preferences

5.1.2 Setting general application options

Setting General Application Options

You can choose to set program start, new schedule default, recent file, FastTip and font options.

To set general options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, and then Application Options.
The FastTrack Schedule Options dialog opens.
3. Click the General tab.
4. Select from the options available.
5. Click OK to close the FastTrack Schedule Options dialog and apply your preferences.

See also:
» Document options
» Setting application options

5.1.3 Setting date options

Setting Date Options

Defines the global format and application-wide use of the three date display styles used in format dialogs and the general format of the dates used throughout the application.

Important:
Date options are intended to be used infrequently. They allow you to set up styles you intend to use later. If you want to change the appearance of individual dates in your schedule, we recommend making those definitions in that particular date's format dialog.

To set date options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.

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2. In the Application menu, click the Options button at the bottom of the menu, and then Application Options.
The FastTrack Schedule Options dialog opens.
3. Click the Dates tab.
4. Select from the options described below.

This Option:		Does this:
Date Order		
mm/dd/yy		Formats all dates in the Month/Day/Year order.
dd/mm/yy		Formats all dates in the Day/Month/Year order.
yy/mm/dd		Formats all dates in the Year/Month/Day order.
Date Format		
Short		Defines the display of the first format displayed in the format dialogs.
Mid		Defines the display of the second and third formats displayed in the format dialogs. The Abbrev version in the format dialogs abbreviates the Day and Month names.
Long		Defines the display of the fourth and fifth formats displayed in the format dialogs. The Abbrev version in the format dialogs abbreviates the Day and Month names.
Display		
Weekday		Defines the display of weekdays.
Month		Defines the display of the month.
Day		Defines the display of the day of the month.
Year		Defines the display of the year.

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Separators		Allows you to enter any character to act as a separator for the elements chosen above. For instance, you could enter slashes (/) for the Short style.
Week Starts on		Allows you to determine what day of the week the application will consider the first day of the week.

5. Click OK to apply your changes and close the dialog.

See also:

- Application preferences
- Setting document preferences

5.1.4 Setting time options

Setting Time Options

Defines the global format of the two time display styles used in format dialogs and the general format of the time used throughout the application.

Important:
Time options are intended to be used infrequently. They allow you to set up styles you intend to use later. If you want to change the appearance of individual times in your schedule, we recommend making those definitions in that particular time's format dialog.

To change time options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, and then Application Options.
The FastTrack Schedule Options dialog opens.
3. Click the Times tab.
4. Select from the options described below.

This Option:		Does This:
Time Format		
12 Hour		Defines the display of the 12 Hour format.
24 Hour		Defines the display of the 24 Hour format.

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12 Hours Display		Allows you to define the display of the options available in the format dialogs.
Hours		Defines the hour of a time with or without leading zeroes.
Minutes		Defines the minute of a time with or without leading zeroes, or without this element.
Separators		Allows you to enter any character to separate the elements chosen above and the display of AM, PM, or Midnight.

5. Click OK to apply your changes and close the dialog.

See also:

» Application preferences

» Setting document preferences

5.1.5 Setting number options

Setting Number Options

Defines the global format of the numbers used in other format dialogs and the general format of numbers used throughout the application.

To set number options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, and then Application Options.
The FastTrack Schedule Options dialog opens.
3. Click the Numbers tab.
4. Select from the options described below.

This Option:		Does This:
Decimal Point		Defines the character used for the decimal point.
Thousands Separator		Defines the character used between thousands.

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List Separator		Defines the character used for separating items in a list, for instance multiple data displayed on a bar.
Reset to System Default		Defaults to the number preferences set in your operating system.

5. Click OK to apply your changes and close the dialog.

See also:

- Application preferences
- Setting document preferences

5.1.6 Setting editing options

Setting Editing Options

Editing options allow you to control the behavior of tools, the resizing of rows, the tracking of items, and high-resolution printing options.

To set editing options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, and then Application Options.
The FastTrack Schedule Options dialog opens.
3. Click the Editing tab.
4. Select from the options described below.

This Option:		Does this:
Printing Options		
Support High Resolution Printing		Optimizes printing so that hairlines display correctly in printed pages.
Row Resizing		
Action Column Only		Allows resizing of row height only in the Action Columns. This helps avoid accidentally resizing rows in other columns.
Data and Action Columns		Allows resizing of row height in both the Action Columns and the data columns.

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Imported Files		Allows you to select whether or not FastTrack will streamline the appearance of the schedule to show all data from imported .XML files.

5. Click OK to apply your changes and close the dialog.

See also:
- Application preferences
- Setting document preferences

5.1.7 Setting save options

Setting Save Options

You can choose to automatically save your open FastTrack Schedule file at regularly scheduled intervals.

To set save options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2.In the Application menu, click the Options button at the bottom of the menu, and then Application Options.
The FastTrack Schedule Options dialog opens.
3. Click the Save tab.
4. Select from the options available.
5. Click OK to close the FastTrack Schedule Options dialog and apply your preferences.

See also:
- Application preferences
- Setting document preferences

5.1.8 Setting AutoArchive options

Setting AutoArchive Options

You can choose to automatically archive your open FastTrack Schedule file by saving a snapshot of your schedule in a specified location at regular intervals and with incremented naming. For example, you can choose to append a numerical suffix to the schedule's title and archive your schedule as Project Alpha 0001, Project Alpha 0002, Project Alpha 0003, etc.

To set auto-archive options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.

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2. In the Application menu, click the Options button at the bottom of the menu, and then Application Options.
The FastTrack Schedule Options dialog opens.
3. Click the AutoArchive tab.
4. Select from the options available.
5. Click OK to close the FastTrack Schedule Options dialog and apply your preferences.

Note:
These AutoArchive preferences are set for all of your files, but you must choose to activate the AutoArchive feature within each file individually. Activate AutoArchiving in the Document Preferences dialog.

See also:
- Application preferences
- Setting document preferences

5.1.9 Setting update options

Setting Update Options

You can determine at what, if any, interval you would like FastTrack to check for updates to the open schedule file whenever a network connection is available.

To set update options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, and then Application Options.
The FastTrack Schedule Options dialog opens.
2. Click the Update tab.
3. Select from the options available.
4. Click OK to close the FastTrack Schedule Options dialog and apply your preferences.

See also:
- Application preferences
- Setting document preferences

5.2 Document Options

5.2.1 Accessing document options

Accessing Document Options

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Setting document options defines the operation and formatting of currency, the behavior of bar and cursor tracking, the content of QuickLook balloons, and the archiving and privacy settings for the particular FastTrack Schedule file you are currently working with.

To access document options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, and then Document Options.
The Document Options dialog opens.

3. Select one of the following tabs:

- General
- Project
- Currency
- Tracking
- QuickLook
- AutoArchive
- Privacy

4. Click OK to close the dialog and apply your options.

Note:
Saving a file as a template keeps both the per-Application and per-Document preference settings of the original file.

See also:
- Setting application preferences

5.2.2 Setting project options

Setting Project Options

You can choose to set the work calendar and bar behavior options for your project.

To set project options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, and then Document Options.
The Document Options dialog opens.
3. Click the Project tab.
4. Select from the options described below:

This Option:		Does This:

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Calendar Calculations		
Hours per day		Determines how many work hours there are in a Standard work calendar's work day. If you want a work day to last from 9 AM - 5 PM rather than 8 AM - 5 PM, you would need to change the default setting from 8.00 hours to 7.00 hours, assuming a 1 hour lunch break.
Hours per week		Determines how many work hours there are in a Standard work calendar's typical work week. If your company considers Saturday a work day, then you would want to adjust the default Hours per week total to reflect that.
Days per month		Determines how many work days there are in a Standard work calendar's typical work month.
Lead/Lag Calendars		Lets you choose which work calendar the lead/lag time of linked tasks will use to determine a bar's behavior.
Units		
Duration Units		Set the default units of task durations in this document.
Work Units		Set the default work units in this document.
Defaults		
Fixed durations...		Sets newly created task bars to have a set, or fixed, duration.
Ignore resource...		When there is a conflict between the task's calendar and the assigned resource's calendar, this will ignore the resource's calendar and base the total work possible on the calendar indicated in that task's Information form.

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Apply effort-driven...		When a resource is assigned to a task, the task's duration is determined by the amount of effort applied to that task. This is the default behavior. You can set individual tasks to be "Fixed Duration" by selecting that option in the task's Information form.

5. Click OK to close the Document Options dialog and apply your preferences.

See also:

- Document preferences
- Setting application preferences

5.2.3 Setting general document options

Setting General Document Options

You can choose to set bar and range behavior in the open document.

To set general options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, and then Document Options.
   The Document Options dialog opens.
3. Click the General tab.
4. Select from the options described below.

This Option:		Does this:
Change Settings on All Bars		
Leave settings on all bars unchanged		Leaves the Fixed Duration, Effort Driven Scheduling and Ignore Resource Calendar setting on all bars unchanged.
Change settings on all bars		Allows you to determine which settings will be changed and to what new setting they will be changed when you make a change to all of the bars in the schedule.
Fixed Duration		Lets you choose how to change the settings of all bars currently designated as Fixed Duration. You can choose to: leave those

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		bars unchanged, make every bar in the document Fixed Duration, or make no bars in the document Fixed Duration.
» Effort Driven Scheduling		Lets you choose how to change the settings of all bars to which Effort Driven Scheduling is currently applied. You can choose to: leave those bars unchanged, apply Effort Driven Scheduling to every bar in the document, or apply Effort Driven Scheduling to no bars in the document.
Ignore Resource Calendar settings		Lets you choose how to change the settings of all bars currently designated to Ignore Resource Calendars. You can choose to: leave those bars unchanged, make every bar in the document Ignore Resource Calendars, or make no bars in the document Ignore Resource Calendars.
Restore All		
Leave Range unchanged after Restore All		Leaves the current timeline range unchanged after using the Restore All option.
Apply Range after Restore All		Allows you to select a range to be applied after using the Restore All option.
Apply last range prior to filtering		Applies the range last selected prior to running the filter or sort that necessitated use of the Restore All option.
Apply All Bars Range		Applies the All Bar Range after using the Restore All option. The All Bar Range shows you a window of time in the timeline that begins on your earliest bar's Start Date/Time and ends on your latest bar's Finish Date/Time.

5. Click OK to close the Document Options dialog and apply your preferences.

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See also:

- Document preferences
- Setting application preferences

5.2.4 Setting currency options

Setting Currency Options

You can choose to set the currency denominator of the open document to something other than the application's default language currency. This is especially helpful when you are working with businesses in other countries.

To set currency options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, and then Document Options.
   The Document Options dialog opens.
3. Click the Currency tab.
4. Select from the options available.
5. Click OK to close the Document Options dialog and apply your preferences.

See also:

- Document preferences
- Setting application preferences

5.2.5 Setting tracking options

Setting Tracking Options

The Tracking tab defines what information is displayed in the Bar Tracking window and Cursor Tracking area. Bar and Cursor tracking shows you information about the current position of the bar and cursor as you drag a bar or move the mouse around the timeline or calendar.

When you hover the cursor over a bar the Bar Tracking window pops up to show start, finish, and duration information about the selected task bar. Cursor Tracking appears in the bottom right of the application windows and can show the date and time over which the cursor is positioned. Both Bar and Cursor Tracking help you to draw and drag bars with precision.

To set tracking options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, and then Document Options.
   The Document Options dialog opens.

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3. Click the Tracking tab.
4. Select from the options described below.

This Option:		Does This:
Cursor Tracking		
Show Cursor Tracking		Choose whether to display the Cursor Tracking window.
Show Date		Displays, in the Cursor Tracking area, the date over which the cursor is positioned in the timeline graph or the calendar.

5. Click OK to apply your changes and close the dialog.

See also:

- Document preferences
- Setting application preferences

5.2.6 Setting QuickLook options

Setting QuickLook Options

QuickLook balloons allow you to view important information about task bars, links, and Calendar View bars. You simply hover your cursor over a bar or a link and a balloon containing information about that item appears on your screen.

The key to QuickLook balloons is that they are completely editable. You can decide how much or how little information to display.

Currently QuickLook balloons are available for:
- Task Bars – In the Schedule View and, if assigned, the Resource View
- Links – In the Schedule View
- Calendar View Bars – In the Calendar View (Though these appear the same as bars in the Schedule View, they have their own QuickLook balloons because additional display options are available in the Calendar View.)

To view a QuickLook balloon:
1. In the Schedule View, hover your cursor over a task bar or over a link between bars.
   -or-
   In the Resource View, hover your cursor over a task bar in the Assignments sub-row.
   -or-
   In the Calendar View, hover your cursor over a task bar.

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To edit QuickLook balloons:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, and then Document Options.
The Document Options dialog opens.
3. Click the QuickLook tab.
4. From the top drop-down list, select the QuickLook you want to modify (bars, calendar bars, or links).
5. Click the Show and Hide buttons to move selections between the Available and Shown table.
The items in the Shown table display in QuickLook balloons.
6. Click OK to apply your changes and close the dialog.

Note:
Clicking the Hide All button removes every item in the Shown table. Clicking the Reset button returns the QuickLook settings for the specified item to the application's default configuration.

See also:
» Document preferences
» Setting application preferences

5.2.7 Setting document specific AutoArchive options

Setting Document Specific AutoArchive Options

You can choose to automatically archive a document and set the location to which the archived document will be sent.

To set document specific auto-archive options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, and then Document Options.
The Document Options dialog opens.
3. Click the AutoArchive tab.
4. Select from the options available.
5. Click OK to close the Document Options dialog and apply your changes.

Note:
Additional AutoArchive options are available in the FastTrack Schedule Options dialog.

See also:
» Document preferences
» Setting application preferences

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5.2.8 Setting privacy options

Setting Privacy Options

You can determine how much of the information shown in the Properties dialog will be exposed and thus searchable.

To set privacy options:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2.In the Application menu, click the Options button at the bottom of the menu, and then Document Options.
The Document Options dialog opens.
3. Click the Privacy tab.
4. Select from the options available.
5. Click OK to close the Document Options dialog and apply your changes.

See also:
- Document preferences
- Setting application preferences

6 The Timeline

6.1 Changing the timeline range

Changing the Timeline Range

Changing the range of dates in a View allows you to see a different period, or "window," of time in the timeline or calendar. The timeline is capable of using anywhere from the year 0002 to the year 6000, however long timelines will impact performance. The timeline can represent any range of time you determine, in units of hours, days, weeks, months, quarters, and years.

To change the range of dates in the timeline:
1. On the Home tab in the Timeline Range group, enter a date in the Start box and the Finish box to determine the range of time you will view.
-or-
In the Duration box, enter the number of timeline units you would like to appear in the timeline relative to the Start Date.

Notes:
- You only have to enter a Start Date and Finish Date or a Start Date and Duration.
- Task bars, items, assigned bars, and usage graphs positioned before or after the timeline range are not deleted, just not in view. You can still see these items by setting a new range that encompasses them.

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See also:
- Changing the timeline units
- Working with ranges

6.2 Changing the timeline units

Changing the Timeline Units

In the Schedule and Resource View, changing the timeline's units allows you to see the timeline in hours, days, weeks, months, quarters, or years. For instance, if the timeline is in timeline units of Weeks, there will be one timeline-column for every week. If you want to view the timeline graph in more detail, you could change the timeline's units to Days – each timeline-column would then represent one day.

To change the timeline units:
1. In the Schedule or Resource View, on the Project tab, in the Timeline group, click Timeline Unit and choose a new unit from the drop-down list.
   -or-
   On every tab, in the Views group, click the action box.
   The Format Schedule/Resource View dialog opens.
2. In the Display tab, click the drop-down list under Timeline Units and select a new unit.
3. Click OK to apply your changes and close the dialog.

See also:
- Changing the timeline graph range
- Changing resource duration units
- Changing schedule duration units

6.3 Changing the schedule duration units

Changing the Schedule Duration Units

FastTrack Schedule allows you to view duration in different units of time. This allows you to view the length of a task bar in work hours, days, weeks, months, quarters, or years. For instance, if the schedule shows durations in units of Weeks and you want to see durations in units of Days instead, you can use the Format Schedule View dialog to change the duration units. Your changes affect values in all Duration columns: Baseline Duration, (Scheduled) Duration, and Actual Duration.

Calendar units are based on a 24 hours a day 7 days a week model, which allows you to schedule tasks anywhere within those parameters. A task lasting one calendar day has a duration of 24 hours, 12 AM to 12 Midnight. A task lasting one work day has an 8 hour duration, 8 AM to 5 PM, or the length of time you have defined for a work day in the Work Calendar.

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To view durations in a different unit of time:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Options button at the bottom of the menu, then choose Document Options.
The Document Options dialog opens.
3. In the Project tab, from the Duration Units drop-down list, select the unit of time.
4. Click OK to apply your changes and close the Document Options dialog.
Durations will be calculated in the unit chosen from the drop-down list.

Notes:
- When you set Duration Units to be calculated in 24-Hour Calendar units, the Custom Work Calendar, while viewable, is no longer applied to the schedule.
- If you select the Use Custom Work Calendar option, durations will be calculated according to the Work Calendar and this may cause bars to jump as you draw or drag them in the timeline graph.

See also:
- Changing the timeline units
- Using the work calendar
- Changing the resource duration units

6.4 Changing the resource duration units

Changing the Resource Duration Units

Duration in the Resource View is the amount of time allotted for a resource to work on a task (the resource's allocation). Duration can be calculated in various units. If the schedule's duration units are calculated in work units, only work units will be available in the Duration Units drop-down list. If the schedule's duration units are calculated in calendar units, only calendar units will be available in the Duration Units drop-down list.

To view resource duration in a different unit of time:
1. In the Resource View, in the View group, click the Dialog Box Launcher.
The Format Resource View dialog opens.
2. From the Timeline Units drop-down list, select a unit of time.
3. Click OK to apply your changes and close the Format Resource View dialog.
Resource allocation is calculated in the units chosen in the drop-down list.

See also:
- Changing the timeline units
- Using the work calendar
- Changing schedule duration units

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6.5 Resizing timeline columns

Resizing Timeline Columns

Resizing timeline columns proportionally changes the width of individual columns in the timeline and timescale rows. Making the timeline graph narrower will let you see more of the timeline in your window and when you print. Making the timeline graph wider can make drawing and dragging bars more accurate.

To change the width of the timeline-columns:
1. Position the cursor over a vertical gridline in the timescale row that displays the base timeline unit.
 The cursor changes to the Horizontal Resize cursor. The timescale row that contains the base timeline unit (the smallest timeline unit) is the one that defines the size of columns in the timeline graph.
2. Drag to the left to make all of the columns narrower or drag to the right to make all of the columns wider.

Notes:
- If the width of the timeline column is not wide enough to display the entire timescale label, the label is partially hidden.
- You will not be able to resize the timeline columns if Fit to Pages (Width) is selected in the Page Options dialog. Fit to Pages sets the timeline columns at a width that will allow them to print to the specified number of pages. If you want to resize timeline columns, select Standard or Wall Chart (Tiled) from the Page Options dialog.

See also:
- Changing the width of columns
- Changing the timeline range

6.6 Formatting the timeline's gridlines

Formatting the Timeline’s Gridlines

Formatting gridlines defines the display of gridlines in columns and the timeline graph in the Schedule and Resource Views.

To format gridlines in a timeline:
1. On the Format tab, in the Display group, click Gridlines.
2. Select from the options described below.

This Option:		Does This:
Define Gridlines		

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Optimize		Automatically defines separate gridlines for display and printing.
Custom Setting		Allows you to design your own gridlines. Define the size and color of the gridlines.
Show Gridlines		
Column Horizontal		Displays horizontal gridlines in columns.
Column Vertical		Displays vertical gridlines in columns.
Timeline Horizontal		Displays horizontal gridlines in the timeline graph.
Timeline Vertical		Displays vertical gridlines in the timeline graph.
Gridline Divisions Per Timeline Unit		Allows you to subdivide a timeline unit with the number of gridlines you specify.

3. Click OK to apply your changes and close the dialog.
Changes made to the Schedule View's gridlines do not apply to the Resource View gridlines and vice versa.

Note:
The Gridline Divisions per Timeline Unit box allows you to enter the number of columns you want shown in each timeline unit.

See also:
- Setting preferences
- Defining font attributes for a selected item

6.7 Using Shift Schedule

Using Shift Schedule

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Using Shift Schedule moves your bars in the timeline graph forward or backward a chosen number of units.

To shift your schedule the Schedule View timeline:
1. On the Tools tab, in the Shift group, click Schedule.
   The Shift Schedule dialog opens.
2. Select from the options described below.

This Option:		Does This:
Shift Forward/Backward		Defines in which direction of time the items will be moved.
(Number)		Defines the number of units the items will be moved.
Units		Defines the units of time described by the (Number) box. For instance, you could move an item Forward four Work Days or Forward four Calendar Days.

3. Click Shift to shift items and keep the Shift Schedule dialog open.
   -or-
   Click Done to close the Shift Schedule dialog without shifting items.

See also:
- Dragging task bars and milestones
- Shifting Items in Timeline Graph

6.8 Shifting items in the timeline

Shifting Items in the Timeline

In the Schedule View, you can shift pictures, text boxes and legends in the timeline graph forward or backward a chosen number of units.

To shift pictures, text boxes and legends in the Schedule View timeline:
1. On the Tools tab, in the Shift group, click Items.
   The Shift Items dialog opens.
2. Select from the options described below.

This Option:		Does This:
Shift Forward/Backwa		Defines in which direction of time the items will be moved.

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rd		
(Number)		Defines the number of units the items will be moved.
Units		Defines the units of time described by the (Number) box. For instance, you could move an item Forward four Work Days or Forward four Calendar Days.
Apply To		Defines which items this move affects. If an option is grayed out, the timeline does not contain any items of this type.

3. Click Shift to shift items and keep the Shift Items dialog open.
-or-
Click Done to close the Shift Items dialog without shifting items.

See also:

- Dragging task bars and milestones
- Moving text boxes
- Moving pictures

6.9 Formatting datelines

Formatting Datelines

A dateline is a way to graphically highlight, in the timeline, a date and time key to your schedule. You can choose to hide or show datelines in the timeline, and you can format each dateline's appearance.

To format the Dateline:
1. On the Format tab, in the Display group, click Datelines.
The format dialog opens in the Datelines tab.
2. In the Dateline Display area, select from the options described below.

This Option:		Does This:
Dateline		Allows you to display the following: - Dateline - Project Start Dateline - Project Finish Dateline - Up to 10 custom datelines

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Show Dateline		When selected, displays a vertical line in the timeline drawn at the appropriate date.
Size		Defines the thickness of the dateline.
Pattern and Color		Sets the pattern and color for the dateline.
Define Dateline By		
Auto Update Every "X" Minutes		Sets the number of minutes between dateline Auto updates,
Set Date/Time To		Sets the fixed date and time for the dateline.

3. If you are formatting the Dateline, you can select the Auto Update Every option to determine how often the Dateline should update.
The Dateline will display on the current date and time, as shown in the Schedule View or Resource.
-or-
If you are formatting the Dateline or a Custom Dateline, you can select the Set Date/Time To option to set a static date and time for the dateline.
4. Click OK to apply your changes and close the dialog.

Note:
The Dateline can move in real time by Auto Updating per the options you set. Custom datelines and the Dateline can also be set to appear in the timeline on the static date and time which you set. The location of the Project Start and Finish datelines is determined by the task data in your schedule.

See also:
» Using the Project Information form

7 Rows

7.1 Working with rows

Working With Rows

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Rows, which are found in the Schedule View, contain all of the information pertaining to a particular task or tasks (if there are multiple bars per row).

Resource rows, which are found in the Resource View, contain all of the information pertaining to a particular resource.

What would you like to do?

- Inserting rows
- Entering task and resource names
- Outlining tasks
- Collapsing tasks and resource sub-rows
- Expanding tasks and resource sub-rows
- Resizing rows
- Moving rows
- Changing the font attributes of rows
- Formatting rows in the Schedule View
- Formatting rows in the Resource View
- Formatting summary bars
- Auto-Fitting row height

7.2 Selecting rows

Selecting Rows

There are multiple ways to select a row or rows in the Schedule and Resource Views.

To select a row or rows:
1. Click in the Row Number action column of the row you wish to select.
 -or-
 To select contiguous rows, hold down the Shift key, click in the Row Number action column and drag the mouse to select multiple rows.
 -or-
 To select non-contiguous rows, hold down the Control key and click their Row Number action columns.
 -or-
 Select all rows in the schedule by right-clicking the the Row Number action column and choose Select All from the context menu.

Note:
You can also select timescale rows, summary graphs and the rows of any of the tables in the program using the Shift and Control keys.

See also:
- Outlining tasks
- Inserting rows

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7.3 Inserting rows

Inserting Rows

Inserting a row adds a new row, or series of rows, between existing rows.

To insert new rows in the Schedule View or Resource View:
1. Select the rows above which you would like new, blank rows to appear.
 If you want to insert three new rows, select three existing rows. The new rows will appear above the topmost of the selected rows.
2. Right-click the Row Number action column, and select Insert Row from the shortcut menu.
 -or-
1. Select the rows above which you want the new rows to appear.
2. On the Insert tab, in the Rows & Columns group, click Row.

Notes:
- You can also insert a series of non-contiguous rows by holding down the Control key and clicking the Row Number action columns of the rows above which you would like a new row to appear.
- Inserted rows will default to the outline level of the row above which they were inserted.
- In the Schedule View, inserting a new row when the schedule has been sorted or when rows are hidden (either by filtering, hiding, or through the Tools menu) can affect your task outline levels.

See also:
» Entering task names

7.4 Entering Task and Resource Names

Entering Task and Resource Names

A task or resource name gives a row its purpose.

To enter task names for new tasks:
1. In the Schedule View, click in the first empty cell of the Activity Name column.
2. Enter a name for the task.

To change the name of a task:
1. In the Schedule View, select a value in the Activity Name column.
2. Enter a new value.

To enter resource names for new resources:
1. In the Resource View, click in the first empty cell of the Resource Name column.
2. Enter a name for the resource.

To change the name of a resource:

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1. In the Resource View, select a value in the Resource Name column.
2. Enter a new value.

See also:
- Outlining tasks
- Inserting rows

7.5 Outlining tasks

Outlining Tasks

In the Schedule View, outlining tasks creates a hierarchy of task levels; for instance, projects, phases, tasks, and sub-tasks. By indenting and outdenting task names, you can create as many outline levels as you would like. Once outlined, task levels can be collapsed and expanded to show different levels of detail.

To indent a task underneath another task:
1. Click on the Activity Name cell of the row you wish to indent.
2. On the Home tab, in the Outline group, click the Indent button.
-or-
1. Click to place the blinking insertion point before the Activity Name value.
2. Press the Tab key on your keyboard.

To "outdent" a task by moving it to the level above:
1. Click on the Activity Name cell of the row you wish to outdent.
2. On the Home tab, in the Outline group, click the Outdent button.
-or-
1. Click to place the blinking insertion point before the Activity Name value.
2. Press the Backspace key on your keyboard.

See also:
- Collapsing tasks
- Expanding tasks
- Formatting summary bars
- Displaying outline levels

7.6 Displaying outline levels

Displaying Outline Levels

You can show or hide specific outline levels in the whole schedule at once using the Outline Toolbar or the menubar.

To display outline levels:

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1. On the Home tab, in the Outline group, click the Show Level drop-down list and select the number of outline levels you wish to display.
If outline levels exist beyond your selection, they will be collapsed.

See also:
» Outlining tasks

7.7 Collapsing tasks and resource sub-rows

Collapsing Tasks and Resource Sub-Rows

Collapsing a task "rolls-up" all of the outline level's sub-tasks that are indented beneath it. The information in the sub-tasks will no longer be visible. Collapsing a resource sub-row "rolls-up" all of the sub-rows that are indented beneath a resource row. The information in the sub-rows will no longer be visible. In the Schedule View, you also have the option of displaying a summary bar that shows the earliest start and latest finish per each bar and milestone style in the sub-tasks.

To collapse a task outline level or resource sub-row:
1. In the Expand/Collapse action column, click the downward-facing triangular handle next to the task or resource sub-row you want to collapse.
-or-
1. Select the row or sub-row you want to collapse.
2. Right-click the Row Number action column, and select Collapse from the context menu.
-or-
1.On the Home tab, in the Outline group, click the Collapse All button.
This collapses all sub-tasks.

Notes:
- Collapsible tasks have sub-tasks indented beneath them.
- Collapsible tasks are the only ones with an Expand/Collapse triangular handle in the Action Column. When tasks are collapsed, their Expand/Collapse triangular handle turns to the right. In the Schedule View, their Activity Name is followed by an ellipsis (...).
- Operations performed on a collapsed outline level affect all collapsed sub-tasks beneath it. For instance, if you move or delete a collapsed task, you move or delete all of its collapsed sub-tasks.

See also:
» Outlining tasks
» Expanding tasks
» Formatting summary bars

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7.8 Expanding tasks and resource sub-rows

Expanding Tasks and Resource Sub-Rows

Expanding tasks "rolls-down" collapsed tasks, allowing you to see all of the level's sub-tasks. It makes all of the information in the sub-tasks visible. Expanding sub-rows "rolls-down" collapsed sub-rows, allowing you to see all of the resource row's sub-rows. It makes all of the information in the sub-rows visible.

To expand a task outline level or resource sub-row:
1. In the Expand/Collapse action column, click the downward-facing triangular handle next to the task or resource sub-row you want to expand.
-or-
1. Select the row or sub-row you want to expand.
2. Right-click the Row Number action column, and select Expand from the context menu.
-or-
1. On the Home tab, in the Outline group, click the Expand All button.
This expands all sub-tasks.

Note:
In the Schedule View, when tasks are collapsed, their Expand/Collapse triangular handle turns to the right, and their Activity Name is followed by an ellipsis (...).

See also:
- Outlining tasks
- Expanding tasks
- Formatting summary bars

7.9 Resizing rows

Resizing Rows

Resizing a row changes its height.

To resize a row:
1. In the Row Number action column, position the cursor over the row's horizontal bottom gridline.
2. Drag the gridline up or down to adjust the row height.
-or-
1. In the columns, position the cursor over the row's horizontal bottom gridline.
2. Drag the gridline up or down to adjust the row height.
This method only works when you have chosen to resize rows in Data and Action Columns in the Editing tab of the Application Options dialog.

To resize multiple rows:
1. Select the rows that you want resized to the same height.

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2. Resize one of the rows as described above.

Notes:
- In the Schedule and Resource Views, rows have two heights: when expanded (usual) and when collapsed. To set either, expand or collapse the row and then resize the row.
- You can also resize rows in the Format Row and Format Resource Row dialogs – each of which you can open by double-clicking in a row's Row Number action column. Size changes made in the Format Resource Row dialog affect the sub-rows only (Percent Usage, Allocated Time Usage, and Assignments). The selected size is used for all three sub-rows.
- In the Schedule View, Auto-Fit can automatically enlarge or reduce row height to fit text as you enter it.

See also:
» Auto-Fitting row height

7.10 Moving rows

Moving Rows

Moving rows up or down in the schedule allows you to change the order in which you view tasks and resources.

To move a row:
1. Click in the Row Number action column and select the row you want to move.
   Once you have selected a row, the cursor changes to the Move cursor.
2. Click and drag the selected row up or down.

To move multiple tasks in an outline level:
1. In the Schedule View, collapse the sub-tasks of an outlined task.
2. Drag the collapsed task as described above.
3. Expand the task again.

Notes:
- In the Schedule View, moving a row when the schedule has been sorted or when rows are hidden (either by filtering, hiding, or through the Tools menu) can affect your task outline levels.
- You can also change the arrangement of tasks and resources using sorts.

See also:
» Sorting tasks and resources

7.11 Showing and hiding rows

Showing and Hiding Rows

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You can hide and show rows using commands in the Editing group on the Home tab. This allows you to select individual rows to be hidden.

To show only the selected rows:
1. Select the row or rows.
2. Right-click and choose Hide Unselected from the context menu.
This leaves visible only the rows that are selected, hiding all other rows.

To hide rows:
1. Select the row or rows.
2. On the Home tab, in the Edit group, choose Hide Selected Rows.
-or-
Right-click and choose Hide from the context menu.
This hides all selected rows leaving visible only the rows that are unselected.

Notes:
-Once you have hidden rows, through the menu or with a filter, you can show them all again by restoring the rows. This shows all hidden rows and rearranges them so that they resume their original, Master Sort order. Right-click a visible row and choose Restore All from the context menu. Restoring does not necessarily return your View to the same appearance it had before you hid rows. If you have made changes that affect the order of tasks or resources, these changes cannot be restored. Changes that affect the order of rows include: moving, inserting, deleting, cutting, and pasting rows.
-You can also restore all hidden rows by clicking the red, Restore All button in the bottom-left corner of your window. This button only appears after rows are hidden (or Filters or Sorts are applied).

See also:
- Working with filters and sorts

- Creating or editing filters
- Working with Schedule and Calendar View filters
- Setting filter options
- Creating a column/value filter
- Creating a date/time filter
- Working with Resource View filters
- Deleting a filter
- Duplicating a filter
- Applying a filter

- Restoring hidden rows

7.12 Showing and hiding resource sub-rows

Showing and Hiding Resource Sub-Rows

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In the Resource View, you can show and hide resource sub-rows in the Define Layouts dialog.

To show and hide resource sub-rows:
1. In the Resource View, on the Project tab, in the Layout group, click Layouts and choose Define from the submenu.
 The Layouts dialog opens.
2. To design a new layout, click the New button.
 -or-
 To edit an existing layout, select the layout from the Layouts table and click the Edit button.
 The Define Layout dialog opens.
3. Click the Resource Sub-rows tab.
4. Select a row from the Available Rows table and click the Show button to send it to the Shown Rows table.
 Rows in the Shown Rows table are displayed in the Resource View.
 -or-
 Select a row from the Shown Rows table and click the Hide button to send it to the Available Rows table.
 Rows in the Available Rows table are not displayed in the Resource View.
 -or-
 Click Hide All to send all the rows in the Shown Rows table to the Available Rows table.
 All sub-rows will be hidden in the Resource View.
5. Click OK to save your layout and close the Define Layout dialog.
6. Click OK to apply the selected layout and close the Layouts dialog.

See also:
- Outlining tasks
- Working with resources

7.13 Formatting rows in the Schedule View

Formatting Rows in the Schedule View

Formatting rows allows you to set the height, background color and pattern, and bottom line color and pattern of rows.

Note: Shading of Alternate Rows is done in the Format Schedule View dialog.

To format rows in the Schedule View:
1. Select the row or rows.
2. On the Format tab, in the Display group, click Format Selected.
 -or-
 Double-click the Row Number action column of the select row or rows.
 The Format Row dialog opens.
3. In the dialog's Display tab, select from the options described below.

This Option:		Does this:

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Use Outline Styles		Allows you to format the appearance of a row in relation to its outline level.
Define Outline Styles		Click to open the Outline Level Styles dialog in which you can set the background and bottom line colors and patterns for each outline level.
Height		
Expanded		Determines at what row height the task will display when its outline levels are expanded.
Collapsed		Determines at what row height the task will display when its outline levels are collapsed or hidden.
Background		
Color		Sets a background color to display in the row.
Pattern		Sets a background pattern to display in the row.
Display Location		Allows the color and pattern you have selected to display on: columns only, the timeline only, the columns and timeline, or not at all.
Bottom Line		
Color		Sets a bottom line color to display in the row.
Size		Sets a line size for the bottom line pattern you are opting to display in the row.
Display Location		Allows the color pattern and line size to display on: columns only, the timeline graph only, the columns and timeline, or not at all.
Page Break After this Row		Sets a page break after the row you are currently formatting.

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

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Notes:
- If you are formatting several rows at once, selecting Page Break After this Row puts a page break after each row.
- The Set as Default option makes the selected settings the default for all newly created rows.

See also:
» Formatting summary bars

7.14 Formatting rows by outline level

Formatting Rows by Outline Level

The row background and bottom line can also be set by outline level. For instance, you could apply a different background color to rows in outline level 1 and 2. If you indent or outdent rows to change a row's outline level, then the background and bottom line will change automatically.

To change the formatting of rows by outline level:
1. In the Schedule View, select the row or rows whose outline level styles you wish to format.
   Important: You must have a row selected for outline level styles to apply to it. If you merely select one row, only that row will be formatted.
2. On the Format tab, in the Display group, click Format Selected.
   -or-
   Double-click the Row Number action column of the select row or rows.
   The Format Row dialog opens.
3. In the Display tab, select the Use Outline Styles checkbox.
4. Click the Define Outline Styles button.
   The Outline Level Styles dialog opens.
5. From the Outline Level table, select the outline level you wish to format.
6. Select from the options described below.

This option:		Does this:
Background		
Color		Allows you to set a background color to display in the row.
Pattern		Allows you to set a background pattern to display in the row.
Display Location		Allows the color and pattern you have selected to display on: columns only, the timeline only, the columns and timeline, or not at all.

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Bottom Line		
Color		Allows you to set a bottom line color to display in the row.
Size		Allows you to set a line size for the bottom line pattern you are opting to display in the row.
Display Location		Allows the color pattern and line size you have selected to display on: columns only, the timeline graph only, the columns and timeline, or not at all.

7. Click OK to apply your changes and close the Outline Level Styles dialog.
8. If you wish, change the row height or page break options.
9. Click OK to apply your changes and close the Format Row dialog.

Notes:
- Rows must be visible (not collapsed or hidden) to have outline level styles applied to them.
- If you select the Set as Default button, the outline level styles will be applied to the rows that you have selected to be formatted and all new rows.
- Click the Copy All button to copy the complete set of outlines style to the Clipboard. To apply outline styles from the Clipboard, open the same dialog in another file and click the Paste All button.

See also:
» Formatting summary bars
» Formatting rows

7.15 Changing the font attributes of rows

Changing the Font Attributes of Rows

Changing the font attributes of individual rows allows you to customize the appearance of the text in the body of the schedule. For instance, you can change the font attributes (such as font, size, and color) of individual rows or groups of rows.

To change the font attributes of an individual row or a group of rows:
1. To select a single row, click in the Row Number action column of the row you wish to select.
 To select contiguous rows, hold down the Shift key, click in the Row Number action column and drag the mouse to select multiple rows.
 To select non-contiguous rows, hold down the Control key and click in the Row Number action column of the rows you wish to select.

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2. On the Home tab, use the options in the Font group to change the font, size, style, color, justification, and line spacing.
-or-
1. right-click in the Row Number action column of a selected row and choose Font from the context menu.
2. In the Font dialog, select the font attributes.
3. Click OK to apply your changes and close the Font dialog.

Note:
Collapsed rows have to be made visible and then selected for font styles to be applied to them.

See also:
- Selecting rows
- Formatting rows in the Schedule View
- Formatting rows by outline level
- Changing font attributes of cells
- Changing font attributes of column headings

7.16 Formatting rows in the Resource View

Formatting Rows in the Resource View

Formatting resource rows allows you to set the height, background color and pattern, and bottom line color of resource rows.

To open the Format Resource Row dialog:
1. Select the resource row or rows you want to format.
2. Double-click the Row Number action column of the selected resource row or any one of the multiple selected resource rows.
The Format Resource Row dialog opens.
3. In the Display tab, from the Format Sub-row drop-down list, select the part of the resource row you wish to change the display of.
4. Select from the options described below.

This Option:		Does this:
Row Background Attributes:		
Display Location		Allows the color and pattern you have selected to display on: columns only, the timeline only, both the columns and the timeline, or not at all.

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Color		Allows you to set a background color to display in the resource row as a whole or in the specified sub-row.
Pattern		Allows you to set a background pattern to display in the resource row as a whole or in the specified sub-row.
Bottom Line Attributes:		
Display Location		Allows the color you have selected to display beneath: columns only, the timeline only, both the columns and the timeline, or not at all.
Color		Allows you to set a bottom line color to display in the resource row as a whole or in the specified sub-row.
Size		Set the size, or thickness, of the bottom line.
Height:		(only available when formatting a resource sub-row)
Expanded		Determines at what row height the resource sub-row will display when it is expanded.
Collapsed		Determines at what row height the resource sub-row will display when it is collapsed or hidden.
Options:		
Page Break After this Row		Sets a page break after the resource you are currently formatting.
Show Scale		Displays the scale for the graph.
Show Parent Tree		Displays the contents of the Parent Tree column (the task preceded by all of its parents) in the Assignments sub-row.

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

Notes:

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- If you are formatting several rows at once, selecting Page Break After this Row will put a page break after each row.
- Clicking the Set as Default button makes the selected settings the default for all new resource rows.
- Formatting of rows can also be done in the Font and Graph tabs.

See also:

- Working with resources
- Understanding the resource Information form
- Creating resources
- Creating and editing a resource work calendar
- Assigning resources to task bars
- Understanding work contours
- Formatting row text in the Resource View
- Formatting graph data in the Resource View

- Resource Assignments
- Resource Assignment Spot Allocation
- Resource Assignment Overtime

7.17 Formatting summary bars

Formatting Summary Bars

If you wish to include summary bars, they can be used whenever sub-tasks exist.

To display summary bars:
1. Format the row to show summary bars.

To format a row to show summary bars:
1. Select the row or rows.
2. On the Format tab, in the Display group, click Format Selected.
   -or-
   Double-click the Row Number action column of the selected row or rows.
   The Format Row dialog opens.
3. Click the Summary Bar tab.
4. Select the Summary Bar option.
   This option is selected by default. When not selected, no summary bars will be displayed.
5. Use the pop-up list to choose the summary bar's bar and milestone style.
6. You can also from the Additional Summaries options described below.

Display:		Does this:
Bars By Style		Displays, in a single row, a summary bar for each bar and milestone style in a task's

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		outline levels. The start of a particular bar and milestone style's summary bar is the earliest Start Date and Time of all bars of that bar and milestone style. The finish of a particular bar and milestone style's summary bar is the latest Finish Date and Time of all bars of that bar and milestone style. The duration of a particular bar and milestone style's summary bar is the length of time in the schedule's Duration units between the earliest start and the latest finish of that bar and milestone style.
Milestones		Displays a summary milestone either in a single style, which you can specify, or, for each style of milestone in a task's outline levels.

7. Click OK to apply your changes and close the Format Row dialog.

Assigning values to Summary Bars is done automatically. The types of values that are summarized are set in the Format Column dialog, Summaries tab for each individual column in your layout. If you don't show a summary bar, its summary bar values are not displayed.

Note:
Summary bars can be dragged up and down in the row but not left to right. The application automatically calculates their horizontal position.

See also:
- Outlining tasks
- Collapsing tasks
- Formatting rows

7.18 Auto-Fitting row height

Auto-Fitting Row Height

Auto-Fitting row height automatically resizes the height of task or resource rows to fit the text and items (bars, pictures, text boxes) in each row's cells. This can be done automatically as you type, or you can apply it afterwards.

To adjust a rows height as you enter new text:
1. On the Tools tab, in the Arrange group, click Auto-Fit and choose Auto-Fit Options from the drop-down list.
The Auto-Fit Options dialog opens.

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2. Select the Allow Row Height to Grow and Allow Row Height to Shrink checkboxes to set rows to grow or shrink as text is entered and edited.
 You can also set minimum Row Height Options and Auto-Fit Considerations from the Auto-Fit Options dialog.
3. Click OK to apply your changes and close the Auto-Fit Options dialog.

To resize rows to best fit the amount of text in each row:
1. In the Schedule View or Resource View, make sure no rows or column headings are selected by clicking in the timeline.
2. On the Tools tab, in the Arrange group, click Auto-Fit and choose View.
 This resizes all rows to heights based on the height of text in each row's cells.

Note:
The Auto-Fit [Selected] command changes with your selection. For instance, select a row to auto-fit a row height and a column heading to auto-fit a column width.

See also:
» Resizing rows

7.19 Going to row number

Going to Row Number

This command scrolls the Schedule View or Resource View to display the row whose number you enter. This is helpful when viewing files with a large number of rows.

To scroll the schedule to see a specific row number:
1. On the Home tab, in the Editing group, click Go To and choose Row from the submenu.
 The Go To Row # dialog opens.
2. Enter the number of the row you want to view.
3. Click OK to display the row and close the Go to Row # dialog.

See also:
» Working with rows
» Row Number Action Column

8 Columns

8.1 Working with columns

Working with Columns

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FastTrack Schedule stores columns in three distinct ways. Columns for the Schedule View are stored either per row or per bar. Columns for the Resource View are stored per resource row.

Every column in the Schedule View and Resource View is application-defined. Columns are hidden until you choose to insert them into a layout. No column can truly be deleted and the Column Map can help you keep track of which of the hundreds of available columns you have inserted and, possibly, renamed.

You change the look of your schedule by showing, hiding, and arranging columns. Groups of selected columns are called layouts.

What would you like to do?

- Insert a column
- Understand available Schedule View columns
- Format the display of column data
- Change the column name
- Change a column's font attributes
- Change a column heading's font attributes
- Define default values
- Define a value list for a column
- Define column summaries
- Using the Column Map

8.2 Schedule View Column Guide

Schedule View Column Guide

The tables below will give you a description of every available column in the Schedule View broken down by column type.

Calculation
Cost
Date
Duration
Flag
Hyperlink
ID/Code
Image
Number
Text
Time
Work

Calculation columns

Column Name:		Description:
Calculation 1-100		Define a formula to calculate using data in the schedule.

Cost columns

Column Name:		Description:

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Baseline Cost 1-10	Capture task costs at up to 10 points in time for the lifetime of the project
Cost 1-10	Formatted to display monetary values
Fixed Cost	Lump sum costs for the task, feeds into Total Cost
Resource Cost	Pre-defined calculation of the assigned resource's rate x work
Total Cost	Pre-defined calculation of Fixed Cost + Resource Cost

Date columns

Column Name:	Description:
Actual Finish Date	Date on which a task actually finished
Actual Start Date	Date on which a task actually started
Baseline Finish Date 1-10	Capture task finish dates
Baseline Start Date 1-10	Capture task start dates
Constraint Date	Date to be used with constraint type
Date 1-10	Formatted to display dates
Early Finish Date	Earliest date task can finish
Early Start Date	Earliest date task can start
Finish Date	Originally estimated finish date "Scheduled"
Finish Date 1-10	Formatted to display dates
Late Finish Date	Latest date a task can finish before project finish date is affected
Late Start Date	Latest date a task can start before project finish date is affected
Revised Finish Date	Revision to task's scheduled finish date
Revised Start Date	Revision to task's scheduled start date
Start Date	Originally estimated start date "Scheduled"
Start Date 1-10	Formatted to display dates

Duration columns

Column Name:	Description:
Actual Duration (Days)	Duration of time it actually took a task to be completed

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Baseline Duration 1-10	Capture task durations at up to 10 points in time for the lifetime of the project
Duration 1-10	Formatted to display durations
Duration	Originally estimated duration "Scheduled"
Finish Float	Number of days task's finish date can slip before project finish date is affected
Free Float	Number of days a task can slip before next task is affected
Revised Duration	Revision to task's scheduled duration
Start Float	Number of days task's start date can slip before project finish date is affected
Total Float	Number of days task can slip before project finish date is affected
Total Resource Duration	The total duration, in hours, of resource work time allocated to a task

Flag columns

Column Name:	Description:
Critical	Yes/No – Yes indicates that the task is on the critical path
Effort Driven	Yes/No - Yes indicates that the task's duration is driven by resource effort
Flag 1-20	Formatted to display Yes/No option
Ignore Resource Calendars	Yes/No - Yes indicates that the task is to ignore the assigned resource's calendar

Hyperlink columns

Column Name:	Description:
Hyperlink 1-10	Formatted to display hyperlink items - email address, URL, file

ID/Code columns

Column Name:	Description:
Task Row ID	ID to identify row
Task Row Number	Number to identify row
Bar ID	Unique identifier for bar
Bar Row ID	Unique identifier for bar row

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Constraint Type	Parameter applied to task to control its behavior as project changes
Parent Tree	Task name complete with parent rows, when using outline levels
Predecessors	Displays which task row(s) a task is dependent on, including link type and lead/lag
Priority	Number field to prioritize your tasks
Resources Assigned	Linked to Resource View; defines assigned resources to task
Status	Automatically calculated, based on % Complete, % Used and Current Dateline
Subproject Task Row ID	In a consolidated file, displays the original Row ID of tasks in a subproject.
Subproject WBS	In a consolidated file, displays the original numerical hierarchy of tasks in a subproject based on their outline levels before consolidation
Successors	Displays which task rows are dependent on what other task rows, including link type and lead/lag
Task Calendar	Assign/Edit a task's calendar (Standard, 24 hour, Nightshift, etc.)
WBS	A numerical hierarchy of tasks based on outline levels

Image columns

Column Name:	Description:
Image 1-10	Formatted to display images

Number columns

Column Name:	Description:
% Complete	Percentage of task completed
% Used	Percentage of a resource's time used
Number 1-50	Customizable to display numerical values

Text columns

Column Name:	Description:
Activity Name	Project tasks/tasks

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Attendees		iCal/Outlook event attendees
Location		iCal/Outlook event location
Notes		When text is entered, a notes indicator appears in the Information Form action column
Text 1-100		Customizable to display text data

Time columns

Column Name:		Description:
Actual Finish Time		Time task actually finished
Actual Start Time		Time task actually started
Baseline Finish Time 1-10		Capture task finish times
Baseline Start Time 1-10		Capture task start times
Constraint Time		Time to be used with constraint type and date
Early Finish Time		Earliest time on Early Finish Date task can finish
Early Start Time		Earliest time on Early Start Date task can start
Finish Time		Originally estimated finish time "Scheduled"
Finish Time 1-10		Formatted to display time
Late Finish Time		Latest time on Late Finish Date a task can finish before project finish date is affected
Late Start Time		Latest time on Late Start Date a task can start before project finish date is affected
Revised Finish Time		Revision to task's scheduled finish time
Revised Start Time		Revision to task's scheduled start time
Start Time		Originally estimated start time "Scheduled"
Start Time 1-10		Formatted to display time

Work columns

Column Name:		Description:
Baseline Work 1-10		Capture task work

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Work		The amount of work hours available to be allocated to resources.

8.3 Displaying columns

Displaying Columns

Showing columns displays columns that are currently hidden. This allows you to see different views of your data.

To show, or insert, a hidden column:
1. Select the column heading to the left of the intended position.
2. On the Insert tab, in the Rows & Columns group, click Column.
The Insert Column dialog opens.
3. Select the type of column you want to insert from the Show pop-up list.
If the column you want to insert does not fit into the listed types, leave the Show setting at "All" and choose from the list of every available column shown in the Column Display Name table.
4. Select the name of the column you wish to show from the Column Display Name table.
Hold down the Control key and you can select multiple columns names in the table.
5. Click OK to insert the selected column and close the Insert Column dialog.
The column now displays in your schedule.

To show and arrange multiple columns at one time:
1. Select any column in the schedule.
2. On the Home tab, in the Editing group, click Select and choose Unhide from the drop-down list.
The Define Layout dialog opens.
3. In the Columns tab, select the column you wish to view from the Available Columns table and click the Show button to move it to the Shown Columns table.
4. Click and drag on the column names in the Shown Columns table to arrange the display order of the columns.
5. Click the lock column of the Shown Columns table to keep selected columns fixed on the screen while you scroll the timeline.
6. Click OK to save your layout and close the Define Layout dialog.
7. Click OK to apply the selected layout and close the Layouts dialog.
-or-
Click Close to close the Layouts dialog without applying the layout.
Even if it is not applied at this time, the layout is saved for later use.

Notes:
- The Column Display Name table contains all existing but hidden columns. If the column you want to insert is not listed, it is already shown. You may have changed its name. Use the Column map, found on the Tools tab in the Tracking group, to discover what name you've given the column.
- Layouts are time savers. If you find yourself showing, hiding, and moving columns often, you should define a new layout that automatically produces that view of the Schedule View or Resource View for you. See Using Layoutsfor more information.

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- Once you have defined which column is displayed, you can use the Format Column dialog to change the column's name and the appearance of its data.

See also:

- Working with columns
- Using Layouts
- Using the Column Map

8.4 Hiding columns

Hiding Columns

Hiding columns that are currently displayed allows you to simplify the appearance of the Schedule View or Resource View.

To hide columns:
1. To hide a column, select the heading of the column you wish to hide.
2. Right-click and select Hide.
-or-
1. To hide multiple columns, on the Project tab, in the Layout group, click Layouts and choose Define from the drop-down list.
The Layouts dialog opens.
2. Select the name of the layout you wish to view in the Layouts table.
3. Click the Edit button.
The Define Layout dialog opens.
4. In the Columns tab, select the name of a column you want to hide from the Shown Columns table.
5. Click the Hide button to move the column out of the Shown Columns table and back to the Available Columns table.
6. Repeat until all the columns you want to hide have been removed from the Shown Columns table.
-or-
Click the Hide All button to hide all columns.
7. Click OK to save your layout and close the Define Layout dialog.
8. Click OK to apply the selected layout and close the Layouts dialog.
-or-
Click Close to close the Layouts dialog without applying the layout.
The layout is saved for later use.

Notes:
- Hiding a column hides its information. You can delete data, but you cannot delete a column; you can only hide it.
- Layouts are time savers. If you find yourself showing, hiding, and moving columns often, you should define a new layout that automatically produces that view of the Schedule View or Resource View for you. See Using Layoutsfor more information.

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See also:
- Working with columns
- Displaying columns
- Using Layouts

8.5 Moving columns

Moving Columns

Changing the position of a column in the Schedule View or Resource View allows you to define the left-to-right order of the information. It also allows you to position columns to the right of the timeline. Moving columns can be done graphically or by using the Define Layout dialog.

To move a column by dragging:
1. Click in the column heading to select the column you wish to move.
 Once you have selected a column, the cursor changes to the Move cursor.
2. Click and drag the column to the left or right until it is correctly positioned.
 If you do not drag the cursor far enough past the destination column, the column snaps back to its original position.
 -or-
 To move a column to the other side of the timeline by dragging, click the desired column heading and drag its outline past the edge of the timeline graph.
 If you are dragging to the right, the right edge of the timeline must be visible. If you are dragging to the left, the left edge of the timeline must be visible.

To move columns by modifying the layout:
1. On the Project tab, in the Layout group, click Layouts and choose Define from the drop-down list.
 The Layouts dialog opens.
2. Click Edit.
 The Define Layout dialog opens.
3. In the Columns tab, click and drag on the column names in the Shown Columns table to change the position of the columns in this layout.
4. Click OK to save your layout changes and close the Define Layout dialog.
5. Click OK to apply the selected layout and close the Layouts dialog.
 -or-
 Click Close to close the Layouts dialog without applying the layout.
 The layout is saved even if it is not applied at this time.

See also:
- Working with columns
- Using Layouts

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8.6 Locking and unlocking columns

Locking and Unlocking Columns

You can lock columns to the left and right of the timeline. If you do so, then only the area between the columns will scroll. This allows you to keep the timeline and locked columns in view.

To lock a column:
1. Select the column you want to lock by clicking in that column's heading.
2. Right-click and select Lock.

To unlock a column:
1. Select the column you want to unlock by clicking in that column's heading.
2. Right-click and select Unlock.

Notes:
- You can lock one column to the left of the timeline and one column to the right. If you do so, then only the area between the locked columns will scroll.
- You can also lock and unlock columns within the Columns tab of the Define Layout dialog, accessed through the Layouts button on the Project tab.
- Locked columns can also be used to define which columns repeat on every page when you print the Schedule View or Resource View. This is defined in the Page Options dialog, accessed by selecting Print in the Application menu.

See also:
- Working with columns
- Using Layouts
- Choosing Page Options

8.7 Using the column map

Using the Column Map

The Column Map is a reference that allows you to see, side by side, the default and custom name of every column available for use in the program. The Column Map also indicates if data in that column is stored per row or per bar.

To open the Column Map:
1. On the Tools tab, in the Tracking group, click Column Map.
   The Column Map dialog opens.
2. Click OK to close the Column Map dialog.

See also:
- Working with columns

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» Using Layouts
» Displaying columns

8.8 Changing the column name

Changing the Column Name

Column names are changed in the Format Column dialog.

To edit the name of a column:
1. Select the column heading of the column you want to format.
2. On the Format tab, in the Display group, click Format Selected.
The Format Column dialog opens.
3. In the Options tab, in the Customized Column Name box, enter or edit the name you would like to display in the column heading.
The Default Column Name is static and will always appear in the option box below the column's customized name should you need to reference it.
4. If the options are available for this column, you can also choose how data in the column is stored, either in relation to a task row, "Per Row" or in relation to a task bar, "Per Bar."
5. If you do not want the column to display in the Columns table of the Information Form, deselect the Show in Information Form option.
6. Click OK to apply your changes and close the Format Column dialog.
The new column name appears in the column heading.

Notes:
- When you change a column name, it automatically changes in any layouts, filters, or sorts you have created.
- To automatically show units in the column headings of the duration columns, select the Show Units in Column Name checkbox in the Display tab of the Format Column dialog.

See also:
» Working with columns
» Locking columns

8.9 Defining default values

Defining Default Values

When you insert a column, you can assign default values to that column. These values appear in the column when a new task, a new task bar, or a new resource is created, depending upon the format of the column.

Date, time, duration, image, WBS, percent complete, and Project Performance (EV) columns cannot have default values.

To assign default values to a column:

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1. Double-click the column heading of the column to which you would like to add default values.
The Format Column dialog opens.
2. Click the Default Values tab.
3. Select from the options described below.

This option:		Does this:
No Default Values		Removes existing default value options from dialog choices (but not from existing cells) and prevents default values from appearing when you enter data into the column.
Static Value		Enters any value data that you would like to appear as this column's value in every new cell created.
Date/Time Stamp		Enters a row's date, time, or date and time of creation.
Auto-Increment Number		Assigns to each new row an auto-incrementing number. It can be a unique ID or serial number, or any series of numbers you want. You determine this by entering the base, or next, value as well as the number by which that value will increase in each successively created row.
Value Cannot be Modified		Prevents the assigned default value of a column from being changed or overwritten. If you do not select this, the column's default values can be modified.

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

Notes:
- Changing a default value option only affects entries created after that change. Previously entered values are not altered.
- A default value displays only when data is entered into another cell in that row.

See also:
- Working with columns
- Creating Value lists

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8.10 Defining column summaries

Defining Column Summaries

A column summary can display the total, average, standard deviation, minimum, maximum, and/or count of values currently shown in a column's cells.

To define column summaries for the column:
1. Double-click the column heading of the column you want to format.
   The Format Column dialog opens.
2. Click the Summaries tab.
3. From the available Column Summaries, select those you want to display below the column.

Column Type:		Summary Operation:		Description:
Number		Total		Adds all values
		Average		Averages all values
		Standard Deviation		Displays standard deviation of all values
		Minimum		Displays minimum value
		Maximum		Displays maximum value
		Count		Counts the number of values
Date		Minimum		Displays earliest value
		Maximum		Displays latest value
		Count		Counts the number of values
Time		Minimum		Displays earliest value
		Maximum		Displays latest value

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		Count		Counts the number of values
Text and Image		Count		Counts the number of values
% Complete		Average		Displays the total of the percent complete values divided by the number of bars in the summary bar.
		Weighted Average		Displays the percent complete as the total time of completed work divided by the total time the summary bar lasts.

4. Format the Label Display of each selected summary type.
5. Click OK to apply your changes and close the Format Column dialog.
   The summary or summaries should now display below the selected column.

Notes:
- Column summaries appear only if the Column Summaries & Timescale (Bottom) option is chosen in the Define Layout dialog.
- Summaries are based only on visible values. Values in collapsed sub-tasks are included but hidden tasks are not included.
- Summary bars are formatted in the Summary Bar tab of the Format Row dialog.

See also:
- Working with columns
- Defining value lists
- Formatting summary bars

8.11 Defining value lists

Defining Value Lists

Value lists provide a fast and accurate method of entering data into the Schedule and Resource Views. For any column into which you can enter data, you can define a list of choices that appear when you move into or click on a cell of that column.

To define value lists:
1. Double-click the column heading of the column you want to format.
   The Format Column dialog opens.

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2. Click the Value List tab.
3. Select from the options described below.

Select:		To:
No Value List		Erase any value lists and prevent choices from appearing when you enter column data. Data already entered using a value list will not be erased.
Custom Value List		Display the values as a list that drops down from the cell, allowing you to select a value either by clicking or typing the first few characters.
ExpressDate ™ Calendar		Display the ExpressDate™ pop-up calendar, allowing you to enter dates with a series of mouse clicks.
ExpressTime ™ Clock		Display the ExpressTime™ pop-up clock, allowing you to enter times with a series of mouse clicks.

4. If you choose the Custom Value List option, enter values into the preset Value List table as you want them to appear.
You can click on a value and drag it up or down to change the order of the list.
-or-
Use the buttons described below to help you build the list.

Click:		To:
Copy List		Store the values in the table so that you can paste them into another column's value list or into other applications.
Paste List		Enter the values copied from another column's value list or another application. If there is an existing value list, this replaces it.
Clear List		Erase all values in the value list table.
Build From Column		Automatically create an entry in the value list table for each unique value currently stored in the column.
Sort Ascending		Reorder the values in the table into alphabetically ascending order: 0–9, A–Z, a–z.

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Sort Descending		Reorder the values in the table into alphabetically descending order: z–a, Z–A, 9– 0.

To move a row up or down in the Value List table, select the row and drag it up or down to the desired position.

When a row is selected a drag icon appears in the right hand side column. This is the drag handle for this row. Click and drag to move the row down in the Value List table.

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

See also:

- Working with columns
- Using value lists
- Using the pop up calendar
- Using the pop-up clock

8.12 Using value lists

Using Value Lists

Using value lists makes data entry faster and more accurate. In order for the value list to appear, you need to have defined a value list for the column. You do this in the Value List tab of the Format Column dialog.

To enter a value using a value list:

1. Click and hold the left mouse button in a cell or move into a cell of the value list column.
2. If using a custom list, use your mouse to select a value from the list or enter the first letter of the desired value to select it and then press the Enter key.

Note:

If you have defined a value list for a column, that value list will appear in the Value cells in the Information form, Resource Information form, and Column/Value Criteria tab of the Define Filter dialog.

See also:

- Working with columns
- Defining value lists for a column

8.13 Entering and editing hyperlinks

Entering and Editing Hyperlinks

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When you insert a column of the type "Hyperlink" you will create hyperlinks, or shortcuts to opening files, contracts, spreadsheets, PDF documents, Microsoft Word documents, Microsoft Excel documents, and URL addresses, in the cells of the column. Hyperlinks are entered and edited in the Define Hyperlink dialog, accessed through the hyperlink column or the Information form. Hyperlinks display as blue underlined text.

To enter a value in a hyperlink column:
1. Double-click in the blank cell of a hyperlink column.
The Define Hyperlink dialog opens.
2. Select from the options described below.

Use this option:		To do this:
Display Name		Type or paste text in the Display Name box. The text you enter here will display as hypertext in the column in lieu of the full path or address. For instance, you can have "AEC Homepage" display rather than "www. aecsoftware.com".
File or URL		Type or paste text in the File or URL box or use the Browse button to enter the exact path to a file.
Launch URL		Click the Launch URL button to test your links before entering them.

3. Click OK to close the Define Hyperlink dialog.

To edit a value in a hyperlink column:
1. Right-click in the hyperlink column cell whose data you wish to edit.
The Define Hyperlink dialog opens.
2. Use the options described above to edit a hyperlink.
3. Click OK to close the Define Hyperlink dialog.
-or-
1. Click the Information Form action column of the task or resource row in which you are working.
In the Schedule View the Information form opens.
In the Resource View, the Resource Information form opens.
2. In the Rows tab, select the Columns tab.
3. Within the Column Name/Values table, click the hyperlink symbol corresponding to the hyperlink column you want to edit.
The Define Hyperlink dialog opens.
4. Use the options described above to edit a hyperlink.
5. Click OK to close the Define Hyperlink dialog.

Notes:
- Files must be entered as a complete path, not simply the file name.

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See also:
- Working with columns
- Creating hyperlinks
- Launching a file or URL address

8.14 Launching a file or URL address

Launching a File or URL Address

Launching opens the file or URL (internet address) that is defined by the value in a hyperlink cell.

To launch a file:
1. Click the value in the hyperlink-defined column.
 This opens the application associated with the file you have selected and opens the file.
 For example, if you double-click a hyperlink with the path "c:\My Documents\letter.doc," Microsoft Word opens and then the "letter.doc" file opens (assuming files with the '.doc' extension are set by default to open with Microsoft Word).

To launch a URL (internet) address:
1. Click the value in the hyperlink-defined column.
 This opens the default Internet browser or the mail application and goes to the address assigned to that hyperlink.
 For example, if you click a hyperlink with the address "www. aecsoftware.com," your default Internet browser (for instance Microsoft Internet Explorer, Mozilla Firefox, etc.) opens and goes to the Internet address (in this case, the AEC Software home page on the world wide web).

See also:
- Working with columns
- Creating hyperlinks
- Entering and editing hyperlinks

8.15 Formatting the display of column data

Formatting the Display of Column Data

Changing the display of values in the column allows you to customize the appearance of the data it contains. For instance, you could change the display of dates from "6/18" to "June 18." The display of values in a column is part of its format.

To format the display of data in a column:
1. Double-click the column heading of the column you want to format.
 The Format Column dialog opens.
2. Click the Display tab.

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If display options are available for that column, they will appear.
3. Use the available options to format the display of the selected column's data.
4. Click OK to apply your changes and close the Format Column dialog.

Notes:
- Remember that the settings you have selected in the Application Options dialog affect the display options that appear in this dialog. For instance, if you set dates to appear as yy/mm/dd in the Dates tab of the Options dialog, then all display options will reflect this format.
- To change the units displayed for Duration columns, use the Duration Units drop-down list in the Display tab of the Format Schedule View or Format Resource View dialogs.
- You cannot change the type of data displayed in columns. Column types are application defined.

See also:
» Working with columns

8.16 Changing font attributes of column headings

Changing Font Attributes of Column Headings

Changing the font attributes of column headings customizes their appearance and can help fit large column names in small heading cells without widening a column. For instance, if a long column name (such as Revised Start Date) is wrapping awkwardly, you could change its font and type size to make it fit in the current width of the heading.

To change the font style of column headings:
1. Right-click the column heading you would like to change and choose Font from the context menu.
The Font dialog opens.
2. Select the font attributes.
3. Click OK to apply your changes and close the Font dialog.

Note:
- To select contiguous column headings, hold down the Shift key, click and drag the mouse to select multiple column headings. To select non-contiguous cells, hold down the Control key and click on the column headings you wish to select.

See also:
» Working with columns
» Changing the font attributes of cells
» Formatting font styles by outline level

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8.17 Changing the font attributes of cells

Changing the Font Attributes of Cells

Changing the font attributes of individual cells allows you to customize the appearance of the text in the body of the schedule. For instance, you can change the font attributes (such as font, size, and color) of individual cells, ranges of cells, or entire columns.

To change the font attributes of individual cells or ranges of cells:
1. To select a single cell, click on the cell.
 To select contiguous cells, hold down the Shift key, click and drag the mouse to select multiple cells.
 To select non-contiguous cells, hold down the Control key and click on the cells you wish to select.
2. Use the options in the Font group, found on the Home tab, to change the font, size, style, color, justification, and line spacing.

To change the font attributes of an entire column:
1. Double-click on the column heading of the column you would like to format.
 The Format Column dialog opens.
2. Click the Font tab.
3. Use the available options to change the font, size, style, color, justification, and line spacing.
4. Select Apply to All Cells in Column and Set as Default to apply the font attributes to every cell in the selected column and all new cells in the column.
 -or-
 Click Apply to Unformatted Cells and Set as Default to apply the selected font attributes to just those cells whose font attributes you have not specifically changed and any new cells in the column.
 Specifically formatted cells are those which you have formatted somewhere other than the Format Column dialog.
 For instance, if you have changed a cell using the Format bar, Fonts control, or Font dialog, these cells are considered formatted and would not change if you selected Apply to Unformatted Cells and Set as Default. Formatted cells will only change if you select the Apply to All Cells in Column and Set as Default option.
5. Click OK to apply your changes and close the Format Column dialog.

Note:
Collapsed rows do not have to be visible for column font styles to be applied to them.

See also:
- Working with columns
- Changing font attributes of column headings
- Formatting columns by outline level

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8.18 Formatting font styles by outline level

Formatting Font Styles by Outline Level

Font attributes can also be set by outline level. For instance, you can apply a larger font to tasks in the Activity Name column that are in outline level 1 than to tasks in the Activity Name column that are in outline level 2.

To change the font attributes of columns by outline level:
1. Double-click on the column heading of the column you would like to change.
 The Format Column dialog opens.
2. Click the Font tab.
3. Select the Use Outline Styles checkbox.
4. Click the Define Outline Styles button.
 The Column Outline Level Styles dialog opens.
5. In the Outline Level table, select the outline level to which you want to apply font attributes.
6. Use the available options to change the font, size, style, color, line spacing, and justification.
7. Click OK to close the Column Outline Level Styles dialog.
8. Select Apply to All Cells in Column and Set as Default to apply the font attributes to every cell in the selected column and all new cells in the column.
 -or-
 Click Apply to Unformatted Cells and Set as Default to apply the selected font attributes to just those cells whose font attributes you have not specifically changed and any new cells in the column.
 Specifically formatted cells are those which you have formatted somewhere other than the Format Column dialog.
 For instance, if you have changed a cell using the Format bar, Fonts control, or Font dialog, these cells are considered formatted and would not change if you selected Apply to Unformatted Cells and Set as Default. Formatted cells (whose styles were not set by column) will only change if you select the Apply to All Cells in Column and Set as Default option.
9. Click OK to apply your changes and close the Format Column dialog.

Notes:
- Clicking the Copy All button copies the outline styles to the Clipboard. Clicking the Paste All button pastes the outline style from the Clipboard.
- Collapsed rows do not have to be visible for column font styles to be applied to them.
- You can design outline styles without applying them by clicking the Define Outline Level button without selecting the Use Outline Styles checkbox. When you are ready to apply the outline styles, you merely select the Use Outline Styles checkbox and the styles you designed previously will be applied.

See also:
- Working with columns
- Changing font attributes of column headings
- Changing the font attributes of cells

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8.19 Showing and hiding column headings

Showing and Hiding Column Headings and Timescales

You can hide and show column headings without affecting the rest of the column.

To show and hide headings and timescales:
1. On the Project tab, in the Layout group, select Layouts and choose Define from the submenu.
   The Layouts dialog opens.
2. Click the Edit button.
   The Define Layout dialog opens.
3. In the Columns tab, select or clear the check boxes described below.

Selecting this:		Does this:
Column Headings & Timescale (Top)		Causes column headings and the top timescale to display in the schedule.
Column Summaries & Timescale (Bottom)		Causes column summaries, if any are defined, and a bottom timescale to display in the schedule.
Mirror Timescale from Top		Causes the bottom timescale to appear as a mirror reflection of the top timescale. Column Summaries & Timescale (Top) must be selected if you want to mirror the top timescale.

4. Click OK to save your layout changes and close the Define Layout dialog.
5. Click OK to apply the selected layout and close the Layouts dialog.
   -or-
   Click Close to close the Layouts dialog without applying the layout.
   The layout is saved even if it is not applied at this time.

See also:

- Working with columns
- Using Layouts
- Applying a layout

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8.20 Using a work breakdown structure

Using a Work Breakdown Structure

When you indent a row beneath another in your schedule, it creates outline levels. These outline levels produce a hierarchical structure in your schedule known as a work breakdown structure (WBS). The key strategy of a WBS is to divide the project into manageable pieces that can be individually planned, estimated, and controlled. A WBS uses codes to represent a task's location in the hierarchy.

To create a WBS, organize your tasks using outline levels and insert a WBS column in your schedule. In the Work Breakdown Structure dialog, assign each outline level a numeric or alphanumeric code that will label its position in the hierarchy. The default setting is to use numbers separated by a period.

To insert the WBS column:
1. Click on the column heading to the left of which you want to insert a column.
2. On the Insert tab, in the Rows & Columns group, click Column.
   The Insert Column dialog opens.
3. From the Insert Column table, select WBS.
4. Click OK to create the new column and close the Insert Column dialog.

To set codes for the WBS column:
1. On the Project tab, in the Details group, click WBS.
   The Work Breakdown Structure dialog opens.
2. If you wish, in the WBS Code Prefix box, enter text to precede each WBS code.
3. In the Sequence column next to outline level 1, select the type of characters for the WBS code.
4. In the Length column, select or type the maximum number of characters in the WBS code for outline level 1.
   You will receive an alert message if the number of characters exceeds this amount.
5. In the Separator column select the character that separates the code in one outline level from the code in the next outline level.
6. Click OK to apply your changes and close the Work Breakdown Structure dialog.

WBS is dynamic and is calculated automatically by FastTrack Schedule. A work breakdown structure cannot be imported into the WBS column. A work breakdown structure can be imported into a text column

Note:
Like all other columns, properties for the WBS column can be set in the Format Column dialog. You can also access the Work Breakdown Structure dialog by clicking the Format WBS button in the Display tab of the Format Column dialog.

See also:
- Working with columns
- Displaying columns

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8.21 Changing columns width

Changing the Width of Columns

Changing the width of a column allows you to resize it to make the text in its heading and the data in its cells fit better.

To change the width of a column:
1. Position the cursor over the right vertical gridline of the column heading you want to resize.
2. When the Horizontal Resize cursor appears, hold down the mouse button and drag the gridline to the right to make the column wider or to the left to make the column narrower.

Note:
You can also resize the column width in the Display tab of the Format Column dialog.

See also:
» Working with columns
Changing the width of timescale & timeline columns

8.22 Auto-Fitting column width

Auto-Fitting Column Width

Auto-Fitting column width automatically resizes the width of columns to fit the longest line of text in a column. You can choose this option after the text is entered. Once you select the option, that width will remain until you resize the column.

To auto-fit column width:
1. Select the heading of the column you want to auto-fit.
2. On the Tools tab, in the Arrange group, click Auto-Fit and choose Column Width from the drop-down list.
This will resize the column width to fit the longest line of text with no carriage returns.
-or-
1. Select a column's heading.
2.Position the cursor over the right vertical gridline of the column heading you want to resize.
3.When the Horizontal Resize cursor appears, double click.

See also:
» Working with columns
» Auto-Fitting row height

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8.23 Showing and hiding Action Columns

Showing and Hiding Action Columns

Action Columns can be shown and hidden individually or as a group. When displayed, they appear to the left of the application window. Action Columns, like all columns, cannot be displayed in the Calendar View.

To show or hide Action Columns:
1. On the View tab, in the Show/Hide group, click Action Columns and select or deselect action columns in the drop-down list.
-or-
1. Right-click in any Action Column header and select or deselect action columns in the context menu.

See also:

- Working with columns
- Using action columns
- Using layouts

8.24 Using Action Columns

Using Action Columns

Action Columns simplify operations performed on tasks and resource rows. There are four types of Action Columns.

Action Column:		Behavior:
Row Number/Row Select		Shows row numbers in the Action Column area to the left of the schedule. Clicking a row number selects that row. To select a block of rows, click a row number and, holding the mouse button down, drag up or down. Once selected, rows can be moved by dragging them up or down. To resize rows, click the bottom gridline in a row's Row Number action column and, when the vertical resize cursor appears, drag up or down.
Page Break		Click in a row's Page Break action column to place a page break in the row. Rows with page break icons are the last row on the printed page.

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Information Form		Opens the Information form in the Schedule View and the Resource Information form in the Resource View. Entering data in an Information form is ideal because, no matter which columns you have hidden in the current layout, you can enter data for every column in one location. (Unless you have specifically chosen not to display a column in the Information Form.)
Expand/Collapse		Shows expand and collapse triangular handles in the Action Column area to the left of the window. When a row's outline level is collapsed, its triangular handle points to the right. Click this handle to expand, or "roll down," its collapsed sub-tasks or, in the Resource View, sub-rows. When a row is expanded, its Expand/Collapse action column contains a triangular handle pointing down. Click this handle to collapse, or "roll up," its sub-tasks or sub-rows. When a row has no tasks indented beneath it, or no data in its sub-rows, its Expand/Collapse action column is empty.

See also:

- Working with columns
- Showing action columns
- Using layouts

9 Task Bars & Milestones

9.1 Working with task bars and milestones

Working with Task Bars and Milestones

A task bar is used to denote a task that occurs over a period of time. Task bars consist of three elements:

A milestone is used to denote a task that occurs in a single moment of time, such as a meeting or a deadline. These types of tasks have no duration. Thus, milestones consist of just one point that has an identical start and finish.

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Task bars and milestones are the graphical representation of the tasks you are scheduling. One of FastTrack Schedule's most powerful features is the ease and totality with which users can manipulate graphic items. The application does not attach any meaning to the appearance of a bar and milestone style so you are free to customize bars, endpoints, and milestones.

What do you want to do?
- Draw task bars
- Drag task bars
- Type dates to draw task bars
- Edit task bar and milestone styles
- Design custom point styles
- Add, editing, and removing labels from task bars
- Link task bars

9.2 Drawing task bars and milestones

Drawing Task Bars and Milestones

Drawing a task bar in the timeline of the Schedule View, or within the calendar of the Calendar View, enters a start date and time, finish date and time, and duration in timeline units for the task in that row. When you draw a bar in the timeline graph, FastTrack Schedule calculates its position. That position is then converted to a date and time and entered in the corresponding columns.

To draw a task bar:
1. On the Home tab, in the Tools group, click the New Bar tool.
2. On the Home tab, in the Bar and Milestone Styles group, select the bar with the desired style from the list.
3. Position the cursor in the timeline or calendar where you want the bar to begin.
4. Clicking and holding the mouse button down, drag to the right and release your mouse.
   This draws a bar and generates the task's start, finish, and duration. Values appear in the Start Date and Time, Finish Date and Time, and Duration columns if you choose to show those columns in your current Layout.

To draw a milestone (a single point, such as a deadline):
1. On the Home tab, in the Tools group, click the Bar tool.
2. On the Home tab, in the Bar and Milestone Styles group, select a bar and milestone style.
3. Position the cursor in the timeline or calendar where you want the milestone to appear.
4. Click once to draw the milestone.
   This enters the Start Date and Time for the task. Values appear in the Start Date and Time columns if you choose to show those columns in your current Layout.

Note:

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Bars drawn with the Bar tool have a default Constraint type of Start On Or After. Creating a bar by entering a duration gives the resulting bar a default Constraint type of As Soon As Possible.

See also:
- Working with bars and milestones
- Typing dates to draw bars

9.3 Dragging task bars and milestones

Dragging Task Bars and Milestones

Moving task bars changes their start, finish, and/or duration. When you drag a bar in the timeline or calendar, FastTrack Schedule calculates its new position in the timeline or calendar and converts it to a date and time that is then displayed in the corresponding columns.

If you drag a bar outside of the parameters of its Constraint Type, the constraint will convert to a type that supports the bars new position.

If a resource has been assigned to a task and the task's task bar displays in the Resource View, you can drag the assigned bars in the resource timeline, which also affects a task's start, finish, and/or duration. If you drag bars in the Calendar View, a task's start, finish, and/or duration is also affected.

Important:
Dragging bars in any View affects the bars in all Views.

Dragging a bar to change its start, finish, and/or duration:
1. Using the Arrow tool, click and drag the part of the bar that you want to change.

Dragging this:		Changes this:
Bar		Start Date & Time, Finish Date & Time
Start Point		Start Date & Time, Duration
End Point		Finish Date & Time, Duration
Milestone		Start Date & Time

Note:
Move multiple bars by holding the Shift key and clicking them or drawing a selection box to include bars in the box. When you move one bar, they will all move.

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See also:
» Working with bars and milestones

9.4 Typing dates to draw task bars and milestones

Typing Dates to Draw Task Bars and Milestones

Typing or editing existing values in the date, time, or duration columns draws or changes the position of the task bar in the timeline graph. This can only be done in the Schedule View or Information form.

Entering a value in the Duration column will draw a bar beginning “now,” as defined by the Project Start Date of your file, and ending the specified number of duration units later. You can type to draw a bar on a specific date or time by entering both a Start Date and a Finish Date or a Start Date/Time and a Duration in the respective columns.

Because its dates, times and durations determine a bar's position in the timeline or calendar, changing a bar's dates, times and durations changes the position of the bar.

To draw a task bar by typing:
1. On the Home tab, in the Bar and Milestone Styles group, select a bar and milestone style from the list.
2. With the appropriate columns inserted in the layout, enter a value in a cell of the Duration column.
3. Click out of that cell.
A bar is drawn starting on "today" and lasting the number of Duration units you entered.
-or-
1. Select a bar and milestone style from the Bar and Milestone Styles drop-down list.
2. Enter a value in the Start Date or Start Time column and a value in the Duration column.
3. Press the Enter key on your keyboard or click out of the cell.
A bar is drawn beginning on the specified Start Date/Time and lasting the number of Duration units you entered.

To draw or move a milestone by typing:
1. Select a bar and milestone style from the Bar and Milestone Styles drop-down list.
2. Enter a value of zero in the Duration column.
3. Press the Enter key on your keyboard or click out of the cell.
4. Enter the Start Date/Time of the milestone or drag to the appropriate date.

Notes:
- The Duration is entered as the number of units you would like the task to last. For instance, if the schedule is displaying durations in units of Days, entering "4" in the Duration column draws a bar beginning on the present day and ending four (work) days later.

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- Entering just a Duration gives the resulting bar a default Constraint type of As Soon As Possible. Bars drawn with the New Bar tool have a default Constraint type of Start On Or After.

See also:
- Working with bars and milestones
- Showing columns

9.5 Changing a bar or milestone to a different style

Changing a Bar or Milestone to a Different Style

At any time, you can change a bar already drawn in the timeline and calendar to a different bar and milestone style which already exists in the Bar and Milestone Styles Toolbar.

To change a bar to an existing bar and milestone style:
1. Select the task bar(s) or milestone(s) whose style you want to change.
2. On the Home tab, in the Bar and Milestone Styles group, select a different bar and milestone style from the list.

See also:
- Working with bars and milestones
- Designing a new bar and milestone style
- Editing a bar and milestone style

9.6 Deleting a bar or milestone

Deleting a Bar or Milestone

You can only delete a bar or milestone in the timeline graph of the Schedule View or in the Calendar View.

To delete a bar or milestone:
1. Select a bar or milestone in the timeline.
2. Press the Backspace or Delete key.
   -or-
   Right-click and select Delete.
   All the Date/Time and Duration data for that bar will be deleted as well.

Note:
Deleting a Bar or Milestone deletes all data for that bar, including in columns that are not displayed.

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See also:
- Working with bars and milestones
- Dragging task bars and milestones

9.7 Going to task bar

Going to Task Bar

This command scrolls the Schedule View or Resource View to display the bar or bars in a selected row.

To scroll to see a specific bar:
1. Select the row in the Schedule or Resource View containing the bar or bars to which you would like to go.
2. On the Home tab, in the Editing group, click Go To and choose Bar.
-or-
Use the keyboard shortcut: Control + D
In the Schedule View, the first bar in the row will appear on screen. If there is more than one bar in a row, continue to use the keyboard shortcut and this will bring you to each subsequent bar in the row.
In the Resource View, the first task assigned to a resource will appear on screen. If there is more than one task assigned to a resource, continue to use the keyboard shortcut and this will bring you to each subsequent task

Note:
In the Schedule View, if a bar you go to lies outside of the Timeline Range, the Timeline Range will change to include the dates of that bar.

See also:
- Working with task bars and milestones
- Dragging task bars and milestones

9.8 Formatting a bar and milestone style

Formatting a Bar and Milestone Style

Formatting a bar and milestone style allows you to create a new bar and milestone style or edit the appearance of an existing style.

What would you like to do?

- Design a new bar and milestone style
- Edit an existing bar and milestone style
- Create custom point styles
- Use bar labels
- Define bar alignment

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See also:

» Working with bars and milestones

9.9 Creating a new bar and milestone style

Creating a New Bar and Milestone Style

When you design a new bar and milestone style, you create it in the Format Bar and Milestone Style dialog and it is added to the library of bar and milestone styles displayed in the Bars Styles Toolbar. A new bar and milestone style can be created in the Schedule, Resource, and Calendar Views.

While you can select options in any order, to design a basic bar, we recommend you do the following. For more information, open the Format Bar and Milestone Style dialog.

To create a new bar and milestone style:
1. Select a bar in your schedule.
2. On the Format tab, in the Display group, click Format Selected.
The Format Bar and Milestone Style dialog opens.
2. From the Type drop-down list, choose Bar (to track start, finish, and duration) or Milestone (to track a single date like a deadline).
3. From the Component drop-down list, select Scheduled, Baseline, or Actual.
4. Click the Parts tab.
5. From the Part to Edit drop-down list, choose the part of the bar and milestone style you wish to format.
6. If you choose to edit a part of the Actual or Baseline component, you will receive the following choices in the component options section:

Options:	Does this:
Show Baseline as a Bar	Displays the Revised component as a bar positioned relative to the Scheduled bar.
Show Baseline as Points	Displays the Revised component as points extending off of the Scheduled points.
Always Show Baseline	Shows the Revised component all of the time.
Show Baseline Only if Different than Scheduled	Shows the Revised component only when the bar's Revised dates differ from the Scheduled dates.

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Show Actual as a Bar	Displays the Actual component as a bar positioned relative to the Scheduled bar.
Show Actual as a Fill	Displays the Actual component as a pattern and color filling the Scheduled or Revised bar.

7. If you receive these options, based on your selections above, choose attributes in the Points, Fill, Border, and Offsets areas.
8. If you want to format other components of the bar or milestone, select them from the Component drop-down list and select their formatting options.
9. Click OK to accept the new bar and milestone style and add it to the Bars Styles Toolbar.

Notes:
- The Scheduled component is the basic component of a bar or milestone. The other components are used for progress tracking.
- If you format a milestone, you need only design its point.
- To see the design of all the components in the example area, select the Show All Components While Editing checkbox. This allows you to view all the components while you are editing one of them.

See also:
- Working with bars and milestones
- Editing a bar and milestone style
- Formatting a bar and milestone style

9.10 Editing an existing bar and milestone style

Editing an Existing Bar and Milestone Style

Editing an existing bar and milestone style changes the appearance of the bar and milestone style using the Format Bar and Milestone Style dialog. You can edit a bar and milestone style in the Schedule, Resource, and Calendar Views. Editing a bar and milestone style changes every instance of that bar and milestone style.

The steps below show you how to edit a basic bar. For more information, open the Format Bar and Milestone Style dialog.

To edit the appearance of a bar and milestone style:
1. In your schedule, select the bar you want to edit.
2. On the Format tab, in the Display group, click Format Selected.
   The Format Bar Styles dialog opens.
3. From the Part to Edit list, select the bar element you want to edit.
   -or-
   In the example of the bar at the top of the dialog, click on the bar element you want to edit.
4. Based on the choice you have made, use the options described below.

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To change this:		Do this:
Point Shape		From the Shape list, select an existing point style and size. Click the New button to create a new Polygon, Picture, or Emoji point style or the Edit button to edit an existing point style.
Bar/Point/Fill		From the Bar/Point/Fill area, select a color, pattern, and size.
Bar/Point Border		From the Border area, select a color, pattern, and size.
Part Position Relative to Bar and Milestone Style		From the Offsets area, select the horizontal and vertical alignment.

5. Click OK to apply your changes and close the Format Bar Styles dialog.

Notes:
- Depending on which part you choose to edit, different formatting options are available in the Parts tab.
- Odd number values entered into Size boxes draw better on the screen.
- You can also copy over bar and milestone styles from the 200 More Bar and Milestone Styles template available in FastTrack Schedule.

See also:
» Working with bars and milestones
» Formatting a bar and milestone style

9.11 Understanding task bar constraints

Understanding Task Bar Constraints

Constraints are the parameters you can assign to tasks to control the behavior of bars as your project changes. Constraints in FastTrack Schedule are based on the CPM (Critical Path Method) project management model and follow the CPM standards.

A constraint categorized as Soft will allow tasks in your schedule to begin and end within an elastic window of time, until the task's start or finish comes into conflict with another dependency.

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A constraint categorized as Moderate will not allow tasks in your schedule to begin and end before or after the date or time you have specified.

A constraint categorized as Hard will not allow tasks in your schedule to begin or end on any date or time except those which you specified. A hard constraint effectively locks your bar finish or start and, if the bar is linked, bypasses the defined dependency if that dependency conflicts with its specified start or finish.

Constraint name:	Category:	Behavior:
As Soon As Possible	Soft	The task is scheduled to begin at the earliest possible moment, taking into account other scheduled tasks. There is no specified Constraint Date, however the Project Start Date often acts as the Constraint Date. This is the default constraint type when bars are created by entering the Duration.
As Soon As Late	Soft	The task is scheduled to begin at the latest possible moment, taking into account other scheduled tasks. There is no specified Constraint Date.
Start On Or After	Moderate	The task is scheduled to begin no earlier than on the Constraint Date you specify. If necessary, it may begin later. This is the default constraint for new tasks that are entered by drawing bars.
Start On Or Before	Moderate	The task is scheduled to begin no later than on the Constraint Date you specify. If necessary, it may begin earlier.
Finish On Or After	Moderate	The task is scheduled to end no earlier than on the Constraint Date you specify. If necessary, it may end later.
Finish On Or Before	Moderate	The task is scheduled to end no later than on the Constraint Date you specify. If necessary, it may end earlier.
Must Start On	Hard	The task will only begin on the specified Constraint Date.
Must Finish On	Hard	The task will only end on the specified Constraint Date.

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See also:
- Working with bars and milestones
- Formatting a bar and milestone style
- Setting bar constraints
- Showing data columns

9.12 Setting task bar constraints

Setting Task Bar Constraints

Constraints are the parameters you can assign to tasks to control how much or how little slippage you will allow in their Start Dates and Times.

To set constraints on a task:
1. Double-click on the task bar or milestone.
The Information form opens to the Bars>Tracking tab.
2. From the Constraint Type drop-down list, select the desired constraint type.
-or-
1. Insert the Constraint Type, Constraint Date and, if needed Constraint Time columns into your schedule.
2. Enter the appropriate data into the Constraint Date and/or Constraint Time column.
3. Click in the Constraint Type column and use the drop-down indicator to select the desired constraint type.

See also:
- Working with bars and milestones
- Formatting a bar and milestone style
- Understanding constraints
- Showing data columns

9.13 Creating custom task bar point styles

Creating Custom Bar Point Styles

Designing new point styles allows you to customize the appearance of your bar and milestone styles. New point styles can be either polygons (shapes similar to the pre-defined styles) or pictures (images you paste from the Clipboard).

To design a new polygon point:
1. Open the Format Bar and Milestone Style dialog for the bar and milestone style to which you want to add custom points.
2. From the Part to Edit drop-down list, select Start Point, End Point, or Milestone.
3. In the Shape area, click the New button.
4. From the Type drop-down list, select Polygon.

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5. In the grid, click to add dots and create the polygon.
   The last dot will automatically connect to the dot created before it.
6. To close the polygon, select the Connected checkbox.
7. Click the Remove button to remove a selected dot.
8. Click the Clear button to remove the polygon and begin again.
9. Click the Revert button to return to the original point.
   Only use Revert when editing an existing polygon point.
10. Click the Split button to insert a point in the middle of a line.
11. Click the Weld button to create a middle point in a selected line and delete the start and end point of the line.
12. From the drop-down list, choose a ratio for displaying the polygon in this dialog.
13. Click OK to close the Format Point dialog.
14. Click OK to apply your changes and close the Format Bar and Milestone Style dialog.

To design a new picture point:
1. Copy the picture you would like use as a point to the Clipboard, following the same rules as if you were pasting a picture to the schedule.
2. Open the Format Bar and Milestone Style dialog for the bar and milestone style to which you want to add custom points.
3. From the Part to Edit drop-down list, select either the Scheduled or Baseline Start or End Point.
4. Click the New button.
5. From the Type drop-down list, select Picture.
6. Click the Paste button.
7. Click OK to close the Format Point dialog.
8. Click OK apply your changes and close the Format Bar and Milestone Style dialog.

See also:

- Working with bars and milestones
- Formatting a bar and milestone style
- Designing a new bar and milestone style
- Editing a bar and milestone style
- Pasting pictures to the timeline graph

9.14 Working with task bar labels

Working with Task Bar Labels

To emphasize certain data, you can attach text to a bar and milestone style. You can add date, time, duration, % complete, and other row or bar information as the label. Labels can be attached to a bar or milestone. You can have as many labels on an item as you wish.

In the Format Bar and Milestone Style dialog you can create separate Schedule labels and Resource labels. You can also apply Schedule labels to bars in the Resource View. Bar labels created in the Format Bar and Milestone Style dialog do not display in the Calendar View. Use the Format Calendar View dialog to create bar labels in the Calendar View.

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To show data on a bar:
1. Right-click on a bar in your schedule.
2. Choose Format Bar Style.
The Format Bar Styles dialog opens.
3. Click the Schedule View Labels or Resource View Labels tab.
4. If you wish to apply labels set in the Schedule View Labels tab to bars in the Resource View, click the Use Schedule View Labels checkbox.
5. From the Show Label on Part drop-down list, select on which part of the bar you would like to display data.
6. From the Available Columns table, select the data you would like displayed on the bar.
7. Click the Show button to send the data to the Shown Columns table.
8. In the Offsets boxes, enter the Horizontal and Vertical distance from the selected element.
9. If desired, click the Format Label button to open the Format Bar Label dialog and access the options described below:

This tab:		Does This
Font		Controls the font, size, style and color of the text in your labels. You can choose to apply these font attributes to a selected cell only (e.g. Activity Name) or to all bar labels (every label on every element of that bar and milestone style).
Borders		Allows you to: place a border and a shadow around a bar label, set the border and shadow line widths, set the corner radius of the border, and select background and line colors. You can also choose to apply the border attributes to all bar labels (every label on every element of that bar and milestone style) or to a selected cell only (e.g. Activity Name).
Display		Determines the appearance of any numbers, dates, times, and duration data in the Shown Columns table.

10. If you have chosen to format the bar label, click OK to apply your changes and close the Format Bar Label dialog.
11. Click OK to apply your changes and close the Format Bar and Milestone Style dialog.

Notes:
- You can add as many pieces of data as you would like to a part of the bar by making multiple selections in the Show Label on Part drop-down list. They will be separated with the character defined as the List Separator in the Numbers tab of the Application Options. They are ordered from top-to-bottom.
- To erase a label, select the data you wish to erase from the Shown Columns table and click Hide. Click Hide All to remove all data from the Shown Columns table. No bar labels will be displayed.
- In the Schedule View, in order for a bar label to be spell checked, the task outline level to which it corresponds must be visible.

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- When placed in a label, column data stored per bar reflects the current bar position, no matter where you might move the bar. Label data stored per row, however, will reflect the row in which the bar is located.

See also:
- Working with bars and milestones
- Formatting a bar and milestone style
- Designing a new bar and milestone style
- Editing a bar and milestone style

9.15 Defining activity bar alignment

Defining Task Bar Alignment

Defining the alignment of a bar and milestone style allows you to fine-tune the position of a task bar relative to the alignment grids. You can define the alignment of a bar and milestone style from the Schedule, Resource, and Calendar Views.

To define the alignment of a bar and milestone style:
1. Right-click on the bar or milestone for which you want to define the aligned position.
2. Choose Format Bar Style.
   The Format Bar Styles dialog opens.
3. Click the Alignment tab.
4. Using the check boxes, select which elements of the bar will snap to the alignment grids.
5. If you want to change the position of the bar relative to the alignment grid, enter horizontal and vertical offset values.
6. Click OK to apply your changes and close the Format Bar and Milestone Style dialog.

Notes:
- As you make your changes, notice how it affects the bar in the Example window relative to the alignment grids.
- Existing bars will not automatically snap to the revised alignment settings. You must select the existing bars, from the Tools menu select Arrange, and choose Align from the submenu.
- Choosing both Start Point and End Point can change the duration of the task fit between alignment grids.

See also:
- Working with bars and milestones
- Formatting a bar and milestone style
- Using alignment grids

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10 Progress Tracking

10.1 Task bar and milestone scheduled, baseline, and actual dates

Task Bar and Milestone Scheduled, Baseline, and Actual Dates

You would usually change the dates of a task by dragging that task's bar. Some situations, and some companies, require a way of tracking these changes. This is called progress tracking.

At all times, FastTrack Schedule automatically tracks the progress of tasks as three sets of dates:

- Baseline – Dates that reflect when your schedule was originally planned, also called the "promised" dates.
- Scheduled – Dates as they are currently projected, accounting for adjustments since the project began.
- Actual – Dates as they actually happened, also tracked as a percentage complete, or "work-in-place."

What would you like to do?

» Defining task bar and milestone scheduled dates
» Defining task bar and milestone baseline dates
» Defining task bar and milestone Actual dates and Percent Complete
» Display Task bar and milestone scheduled, baseline, and actual bar parts
» Capturing task bar and milestone dates into baseline
» Setting task bar and milestone dates from baseline
» See an example of progress tracking

10.2 Defining task bar and milestone scheduled dates

Defining Task Bar and Milestone Scheduled Dates

When you draw a bar with the Bar tool or enter data in Start, Finish, or Duration columns, you are entering the Scheduled dates. The label "Scheduled" is omitted from the columns so as not to confuse novice users.

To define Scheduled dates by drawing:
1. In the Schedule or Calendar Views, in the Tools controls, select the New Bar tool.
2. In the Format Bar > Bar and Milestone Styles pop-up list (the Bar Styles Library), select the bar and milestone style that you desire.
3. Both bars and milestones can be drawn using the New Bar tool.
4. To draw a bar, position the cursor in the timeline or calendar where you want the bar to begin.
5. Clicking and holding the mouse button down, drag to the right and then release your mouse.
6.To draw a milestone, hold down the Control key on the keyboard (this is referred to as a modifier key), then position the cursor in the timeline or calendar where you want to draw the

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Milestone, Click and hold the mouse button down and drag to the right and then release your mouse. The milestone will be drawn where the mouse button was released.
If you want to draw multiple bars and/or milestones, click the lock icon in the Format Bar to lock-in the New Bar tool. When finished drawing bars and milestones, remember to click the lock icon in the Format Bar again to unlock the New Bar tool.

To define Scheduled dates by typing:
1. In the Schedule View, enter values in the task's Duration, Start Date, Start Time, Finish Date, Finish Time columns. The default duration is one (1).

See also:
- Task bar and milestone scheduled, baseline, and actual dates
- Defining task bar and milestone baseline dates
- Defining task bar and milestone Actual dates and Percent Complete
- Display Task bar and milestone scheduled, baseline, and actual bar parts
- Capturing task bar and milestone dates into baseline
- Setting task bar and milestone dates from baseline
- See an example of progress tracking

10.3 Defining task bar and milestone baseline dates

Defining Task Bar and Milestone Baseline Dates

Defining a task's Revised dates updates the currently projected start, finish, and/or duration of the task.

For instance, if changes to earlier tasks will force the task to slip, starting and ending later, these changes can be made to Revised dates. This leaves the Scheduled dates as they were originally planned, allowing you to see the difference between the original schedule and the currently projected schedule.

You can always define a task's Revised dates from the Schedule and Calendar Views. If a task has been assigned to a resource, you can also revise its dates from the Resource View.

To define Revised dates by dragging:
1. In the Schedule or Calendar Views, on the Home tab, in the Tools group, select the Revise tool.
2. Click a position in the bar whose Revised dates you want to enter or edit and holding the left mouse button down, drag to the right or left and release your mouse.
If you want to draw multiple bars, check the Lock Tools box after selecting the Revise Tool.

To define Revised dates by typing:
1. If not already displayed, show the Revised date, time and/or duration columns using layouts or the Insert Column dialog.
2. Enter values in the task's Revised Start Date, Revised Start Time, Revised Finish Date, Revised Finish Time, or Revised Duration columns.
-or-
Click in the Information Form action column, select the Bars>Columns tab, and enter values in the Revised Date/Time and Duration boxes.

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Notes:
- The Revised dates are automatically entered when you enter Scheduled dates. Until there are changes, the Revised (currently projected) dates are the same as the Scheduled (original) dates.
- The display of the Revised data on the bar is defined by the format of the bar and milestone style.

See also:
- Task bar and milestone scheduled, baseline, and actual dates
- Defining task bar and milestone scheduled dates
- Defining task bar and milestone Actual dates and Percent Complete
- Display Task bar and milestone scheduled, baseline, and actual bar parts
- Capturing task bar and milestone dates into baseline
- Setting task bar and milestone dates from baseline
- See an example of progress tracking

10.4 Defining task bar and milestone Actual dates and Percent Complete

Defining Task Bar and Milestone Actual Dates and % Complete

Defining Actual dates and % Complete defines how much work has been done on a task. You can always define a task's Actual dates from the Schedule and Calendar Views and, if a task has been assigned to a resource, you can also edit its Actual dates from the Resource View.

Note:
% Complete can be tracked by itself, without any reference to Task bar and milestone scheduled, baseline, and actual dates. This works well for simple schedules that still require a way of displaying how much work has been done on a task.

To define % Complete by drawing:
1. If not already displayed, show the % Complete column using layouts or the Insert Column dialog.
2. In the Schedule or Calendar Views, in the Tools controls in the Format bar, select the Edit percent complete tool.
3. Click a position in the bar whose % Complete dates you want to enter or edit and holding the left mouse button down, drag to the right or left and release your mouse.
If you want to draw the percent complete on multiple bars,click the lock icon in the Format Bar to lock-in the Edit percent complete tool.

To define % Complete by typing:
1. If not already displayed, show the % Complete column using layouts or the Insert Column dialog.
2. Enter a number in the % Complete column.
-or-

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1. Click in the Information Form action column, select the Bars>Tracking tab, and enter a value in the % Complete box.

To define Actual dates by drawing:
1.In the Schedule or Calendar Views, in the Tools controls, select the Percent tool.
2. Click anywhere to the right of the start point of the bar to enter the Actual Start Date and Time.
-or-
Click the end of the bar to enter the Actual Finish Date and Time and Actual Duration.

To define Actual dates by typing:
1. If not already displayed, show the Actual columns using layouts or the Insert Column dialog.
2. Enter values in the task's Actual Start Date, Actual Start Time, Actual Finish Date, Actual Finish Time, or Actual Duration columns.
-or-
Click in the Information Form action column, select the Bars>Tracking tab, and enter values in the Actual Date/Time and Duration boxes.

Notes:
- The display of the % Complete and Actual dates is defined by the format of the bar and milestone style.
- The Actual dates are always the same as the Scheduled dates because the Scheduled dates represent the current projections – actual work on a task is done in relation to the currently projected dates and times.
- If showing %Complete on the bar as a fill pattern, the fill is drawn in the Scheduled component if the Scheduled component is displayed.

See also:
- Task bar and milestone scheduled, baseline, and actual dates
- Defining task bar and milestone scheduled dates
- Defining task bar and milestone baseline dates
- Display Task bar and milestone scheduled, baseline, and actual bar parts
- Capturing task bar and milestone dates into baseline
- Setting task bar and milestone dates from baseline
- See an example of progress tracking

10.5 Displaying task bar and milestone scheduled, baseline, and actual bar parts

Displaying Task Bar and Milestone Scheduled, Baseline, and Actual Bar Parts

You can define how each bar and milestone style displays the Scheduled, Revised, and Actual components. This gives you an almost infinite amount of ways to track progress on the tasks in your schedule. You can edit the display of bar and milestone styles from the Schedule, Resource, and Calendar Views.

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To open the Format Bar and Milestone Styles dialog:
1. From the Format menu, choose Bar Styles.
The Format Bar and Milestone Style dialog opens.
-or-
1. Select a bar in your schedule.
2. From the Format menu, choose Format Selected.
The Format Bar and Milestone Styles dialog opens.

To design the Scheduled component of a bar (this is the basic bar component):
1. From the Type drop-down list, choose to design a Bar (to track start, finish, and duration) or a Milestone (to track a single date like a deadline).
2. From the Component drop-down list, select Scheduled.
3. In the Parts tab, choose from the available options.

To design the Revised component of a bar:
1. From the Type drop-down list, choose to design a Bar (to track start, finish, and duration) or a Milestone (to track a single date like a deadline).
2. From the Component drop-down list, select Revised.
3. Select from the Component Options described below.

Options:		Does this:
Show Revised as a Bar		Displays the Revised component as a bar positioned relative to the Scheduled bar.
Show Revised as Points		Displays the Revised component as points extending off of the Scheduled points.
Always Show Revised		Shows the Revised component all of the time.
Show Revised Only if Different than Scheduled		Shows the Revised component only when the bar's Revised dates differ from the Scheduled dates.

4. In the Parts tab, choose from the formatting options that appear.

To design the Actual component of a bar:
1. From the Type drop-down list, choose to design a Bar (to track start, finish, and duration) or a Milestone (to track a single date like a deadline).
2. From the Component drop-down list, select Actual.
3. Select from the Component Options described below.

Options:		Does this:
Show Actual as a Bar		Displays the Actual component as a bar positioned relative to the Scheduled bar.

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Show Actual as a Fill		Displays the Actual component as a pattern and color filling the Scheduled or Revised bar.

4. In the Parts tab, choose from the formatting options that appear.

See also:
- Task bar and milestone scheduled, baseline, and actual dates
- Defining task bar and milestone scheduled dates
- Defining task bar and milestone baseline dates
- Defining task bar and milestone Actual dates and Percent Complete
- Capturing task bar and milestone dates into baseline
- Setting task bar and milestone dates from baseline
- See an example of progress tracking

10.6 Capturing task bar and milestone dates into baseline

Capturing Task Bar and Milestone Dates into Baseline

Within Baseline, Scheduled, and Actual progress tracking, resetting the Actual date returns the selected bar's Actual dates to the Scheduled dates. For instance, you could have changed the Actual dates of a task by defining a % complete.

If you wish to return the task to 0% percent complete, Reset Actual does this automatically. Remember that unless you have explicitly changed them, the Scheduled dates are the same as the Baseline dates.

To reset a bar's Actual dates to its Scheduled dates:
1. Use the Arrow tool to select the desired bar or bars.
 -or-
 Right-click and choose Select All from the Context menu.
2. On the Tools tab, in the Tracking group, click Reset Actual.

See also:
- Task bar and milestone scheduled, baseline, and actual dates
- Defining task bar and milestone scheduled dates
- Defining task bar and milestone baseline dates
- Defining task bar and milestone Actual dates and Percent Complete
- Display Task bar and milestone scheduled, baseline, and actual bar parts
- Setting task bar and milestone dates from baseline
- See an example of progress tracking

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10.7 Setting task bar andmMilestone dates from baseline

Setting Task Bar and Milestone Dates from Baseline

Within Scheduled, Revised, and Actual progress tracking, resetting the Revised date sets the selected bar's Revised dates to match the original Scheduled dates. For instance, you could have changed the Revised dates of a task, slipping it later. If those revisions no longer apply, you want to return the Revised dates back to their original Scheduled dates. Reset Revised does this automatically.

To reset a bar's Revised dates to its Scheduled dates:
1. Use the Arrow tool to select the desired bar or bars.
 -or-
 Right-click and choose Select All from the Context menu.
2. On the Tools tab, in the Tracking group, click Reset Revised.

Notes:
- If the Revised component of the bar and milestone style is currently visible in the schedule but the Show Revised Only if Different than Scheduled option is selected in the Format Bar and Milestone Style dialog, resetting the Revised dates will hide the Revised component.
- Applying Reset Revised to a bar resets the Actual and Revised dates and times to the Scheduled dates and times. The % complete is returned to zero.

See also:
- Task bar and milestone scheduled, baseline, and actual dates
- Defining task bar and milestone scheduled dates
- Defining task bar and milestone baseline dates
- Defining task bar and milestone Actual dates and Percent Complete
- Display Task bar and milestone scheduled, baseline, and actual bar parts
- Capturing task bar and milestone dates into baseline
- See an example of progress tracking

10.8 Progress tracking example

Progress Tracking Example

This example tracks the progress of a task in the design phase of a new product.

Example: Schedule #1. As an example, the graphic below represents what a schedule would look like when you first plan the project. At this stage, the task bars represent the Scheduled starts and finishes. In this example, the Scheduled component is the blank bar, the Revised component does not display at this time for this bar and milestone style, and the Actual component will not display until work has begun.

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Schedule #2. Now some of the start dates have slipped and the Revised bar element now displays.

Schedule #3. Now take a look at the schedule since work has begun. We have completed the first three tasks, as shown by the red Actual fill pattern. We can also see that task 2, Research, was completed on time – the Task bar and milestone scheduled, baseline, and actual dates are all the same. We have also completed 50% of the Design task, as shown by the red Actual fill in half of the Revised bar.

Notice that links always connect the Revised elements of task bars.

Schedule #4. The last schedule shows that all tasks have been completed. Their bars show the difference between their Scheduled and Revised dates.

See also:

- Task bar and milestone scheduled, baseline, and actual dates
- Defining task bar and milestone scheduled dates
- Defining task bar and milestone baseline dates
- Defining task bar and milestone Actual dates and Percent Complete
- Display Task bar and milestone scheduled, baseline, and actual bar parts
- Capturing task bar and milestone dates into baseline
- Setting task bar and milestone dates from baseline

11 Linking Task Bars

11.1 What is a task bars link?

What Is a Task Bars Link?

Linking two task bars creates a dependency whereby, if the dates of one task change, all dependent task bars' dates change accordingly.

What would you like to do?

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- Managing task bars links
- Defining types of task bars links
- Link task bars
- Unlinking task bars
- Drag linked task bars
- Format the appearance of task bars links
- Showing and hiding task bars links
- Dragging linked task bars
- Understanding Lead and Lag time of task bars links

11.2 Managing task bars links

Managing Task Bars Links

Linking is a means of controlling how changes to the dates and times of one task impact the scheduling of other tasks in your schedule. To link is to create dependencies between tasks in your schedule.

For example, if you were scheduling a construction project and a key task, such as framing, were to slip, then all the projects that can only occur when framing is done, such as drywalling, plastering and painting, will all need to be rescheduled accordingly. By linking all these tasks in your schedule, you save yourself from having to manually change each affected task.

Linking in FastTrack Schedule is based on the CPM (Critical Path Method) project management model and follows the standards therein.

Use constraints and lag time to control how task bars and milestones react to changes in the originally scheduled dates and times.

The Information Form
The Bars>Links tab of the Information form allows you to set and modify important link information. You can create links by opening the Information form for a particular bar and then entering information about the predecessor and successor bars to which you want to link that bar.

Predecessor Bar – In the From/To relationship that defines a link Type, for example From Finish To Start, the predecessor bar is the "From" and the bar whose information you are currently viewing in the Information form is the "To." So if a link in the Predecessors table is classified as Type “Finish to Start,” the link originates from the Finish point of the predecessor bar.

Successor Bar – In the From/To relationship that defines a link Type, the successor bar is the "To" and the bar whose information you are viewing in the Information form is the "From." So if a link in the Successors table is classified as Finish to Start, the link extends to the Start point of the successor bar.

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The labels predecessor and successor have nothing to do with a bar location in the timeline or its dates. The terms relate only to the From/To direction that defines a link Type.

Below is an explanation of each column in the Predecessors and Successors tables located in the Bars>Links tab of the Information form.

In this column:		Do this:
		Click the icon to open the Information form for the predecessor or successor bar.
Row		Enter or edit the row number of the predecessor or successor bar.
Bar		Enter or edit the Bar ID of a bar you want to be linked from (predecessor) or link to (successor).
Activity Name		View the task name of the predecessor or successor bar. When you have entered a Bar ID and/or Row number, the name of the task is filled in. Once it appears in the cell, you can edit the task name of a predecessor or successor bar.
Type		Select the origin and destination of the link. FastTrack Schedule supports Finish to Start, Finish to Finish, Start to Start, and Start to Finish links.
Lead/Lag		Enter or edit the lead or lag time for this link. This is the number of duration units that this link can move, or slip, before the constraint parameters you have set for the linked tasks are affected.
Link Duration		Displays the duration of the link in duration units.

Notes:
- In this help system, a > indicates a tab within a tab. For example, the Bars>Links tab signifies that there is a Links tab within the Bars tab.

See also:
- What is a task bars link?
- Defining types of task bars links

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- Link task bars
- Unlinking task bars
- Drag linked task bars
- Format the appearance of task bars links
- Showing and hiding task bars links
- Dragging linked task bars
- Understanding Lead and Lag time of task bars links

11.3 Defining types of task bars links

Defining Types of Task Bars Links

FastTrack Schedule supports four types of links - Finish to Start, Start to Start, Finish to Finish, and Start to Finish links.

This link type:	Looks like this:	And works this way:
Finish to Start		Task 1 must finish before Task 2 starts. This is the most commonly used link type.
Start to Start		Task 2 must not start until Task 1 starts.
Finish to Finish		Task 2 must not finish until Task 1 finishes.
Start to Finish		Task 2 must not finish until Task 1 starts.

See also:

- What is a task bars link?
- Managing task bars links
- Link task bars
- Unlinking task bars
- Drag linked task bars
- Format the appearance of task bars links
- Showing and hiding task bars links
- Dragging linked task bars
- Understanding Lead and Lag time of task bars links

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11.4 Linking task bars

Linking Task Bars

Bars can only be linked in the Schedule View. Linking task bars creates a dependency from a point on one bar (the "predecessor") to a point on a second bar (the "successor"). This dependency illustrates the relationship that the dates of one task have to another.

For instance, if the start of the task "Interview for Position" cannot begin until the task "Read Resumes" has ended, the two are dependent and should be linked in a Finish to Start relationship.

To draw links between bars:
1. On the Home tab, in the Tools group, click the Bar Link tool.
2. Click the finish or start of one bar and drag to the start or finish of a second bar.

To link selected bars:
1. Select the bars between which you want to create dependencies.
2. On the Home tab, in the Link group, click Link.

To create links in the Information form:
1. Double-click a task bar.
2. In the Bars>Links tab of the Information form, create a link by entering data in either the Predecessors or Successors table.

Note:
Clicking Link after selecting bars automatically draws links from the finish point to the start point of the selected bars. The application also supports Finish to Finish, Start to Start and Start to Finish links.

See also:
- What is a task bars link?
- Managing task bars links
- Defining types of task bars links
- Unlinking task bars
- Drag linked task bars
- Format the appearance of task bars links
- Showing and hiding task bars links
- Dragging linked task bars
- Understanding Lead and Lag time of task bars links

11.5 Unlinking task bars

Unlinking Task Bars

Unlinking task bars removes dependencies between tasks, allowing you to drag the bars without affecting other bars.

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To delete a specific link:
1. Click the line that graphically represents the link you want to delete.
This selects the link.
2. Press the Delete key.
-or-
1. Double-click on one of the bars in the link relationship you wish to delete.
2. In the Bars>Links tab of the Information form, delete the ID of the other bar in the link relationship.
3. Click OK to delete the link and close the Information form.

To unlink all dependent tasks from a single bar:
1. Select the task bar from which you want all links removed.
2. On the Home tab, in the Link group, click Unlink.
-or-
1. Double-click on the bar whose links you wish to delete.
2. In the Bars>Links tab of the Information form, delete the ID of every bar in the Predecessors and Successors tables.
3. Click OK to delete the links and close the Information form.

To unlink all dependent tasks from several bars:
1. Select multiple bars whose dependencies you wish to delete.
2. On the Home tab, in the Link group, click Unlink.

Notes:
- By deselecting Links in the Show/Hide group on the View tab, links can be hidden without being deleted.
- When you drag linked bars, the constraint type of the link is reset to Start On Or After.

See also:
- What is a task bars link?
- Managing task bars links
- Defining types of task bars links
- Link task bars
- Drag linked task bars
- Format the appearance of task bars links
- Showing and hiding task bars links
- Dragging linked task bars
- Understanding Lead and Lag time of task bars links

11.6 Format the appearance of task bars links

Format the Appearance of Task Bars Links

Designing links allows you to customize the appearance of links to fit personal styles or standards put forth by your company or organization.

To design links:

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1. In the Schedule View, on the Format tab, in the Display group, click Link.
   The Format Link dialog opens.
2. Select from the options described below..

To:		Do this:
Change arrowhead shape		Select a style from the Shape list under Arrows.
Change line thickness		Select a line from the Size list.
Change the pattern and color		Select a new pattern and color for the line and the arrowhead from the lists.
Change the link path		Select from diagonal, out-and-down, or down-and-out.
Optimize the appearance of lines when printing with a high-resolution printer		Select Optimize Hairline.

3. Click OK to change your link style and close the Format Link dialog.

Note:
It is a good idea to design links and Critical Path(s) in such a way that you can tell them apart.

See also:
- What is a task bars link?
- Managing task bars links
- Defining types of task bars links
- Link task bars
- Unlinking task bars
- Drag linked task bars
- Showing and hiding task bars links
- Dragging linked task bars
- Understanding Lead and Lag time of task bars links

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11.7 Showing and hiding task bars links

Showing and Hiding Task Bars Links

Hiding links hides the lines between dependent tasks but retains the same linked behavior. This allows you to view or print a less complicated looking schedule. You can only hide or show links in the Schedule View.

To hide or show links:
1. In the Schedule View, on the View tab, in the Show/Hide group, click Links.
When the links are displayed, the Links button is highlighted in the Show/Hide group.

See also:
- What is a task bars link?
- Managing task bars links
- Defining types of task bars links
- Link task bars
- Unlinking task bars
- Drag linked task bars
- Format the appearance of task bars links
- Dragging linked task bars
- Understanding Lead and Lag time of task bars links

11.8 Dragging linked task bars

Dragging Linked Task Bars

Linking tasks throughout the schedule allows you to see how changing one bar will affect the final outcome of the schedule.

Dragging linked bars moves the selected bar and all bars which are dependent upon it. A dependent bar will not move, however, if moving would conflict with that dependent bar's Constraint Type parameters, or if the task represented by the dependent bar has actually started.

When you drag a bar, moving that bar beyond its Constraint Type parameters will cause the Constraint Type to change to “Start On Or After” – the default Constraint Type.

To drag a linked task:
1. Click either the linked point or the middle of the bar and drag to the left or right.

Notes:
- Linking in FastTrack Schedule is based on the CPM (Critical Path Method) project management model and the behavior of linked bars adheres to that standard.
- Changing the Baseline and Actual dates may change Baseline or Actual dates of dependent bars.

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- While dragging a linked bar, only the selected bar moves. Dependent bars, if their constraints allow the move, move only once you stop dragging the selected bar and release the mouse.

See also:
- What is a task bars link?
- Managing task bars links
- Defining types of task bars links
- Link task bars
- Unlinking task bars
- Drag linked task bars
- Format the appearance of task bars links
- Showing and hiding task bars links
- Understanding Lead and Lag time of task bars links

11.9 Understanding Lead and Lag time

Understanding Lead and Lag Time of Task Bars Links

When setting up task dependencies consider that there may be scenarios where certain tasks cannot start immediately at the conclusion of their predecessor tasks, there must be an additional delay before starting. In other cases, a successor task may need to start a certain period of time before the scheduled conclusion of its predecessor task. In these scenarios, you will need to consider setting up a Lag or Lead (Lag/Lead) duration for the task.

Lag: A unit of duration used as a delay between two tasks. Lag durations are entered as positive values. An example of this could be the predecessor task of pouring concrete prior to the successor task of building a house. If the concrete takes 2 days to cure and dry, the dependency link would require a lag of 2 days.
Lead: A unit of duration used to provide an overlap, or “head-start”, between two linked tasks. Lead durations are entered as negative values. An example of this could be the predecessor task of completing the shooting of a film, with a finish to start dependency on a successor task of editing film. If editing film can begin 7 days prior to the end of completing the shooting of a film, then the dependency link would require a lead of -7 days.

Editing the Lead or Lag time of a link:
1. Double-click a task bar whose lag/lead time you would like to edit.
2. In the Bars>Links tab of the Information form, edit the Lag/Lead time in the Predecessors or Successors table.
-or-
1. Double-click a link whose lag/lead time you would like to edit.
2. In the Link Information form, edit the lag/lead time for the selected link.

See also:
- What is a task bars link?
- Managing task bars links
- Defining types of task bars links

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- Link task bars
- Unlinking task bars
- Drag linked task bars
- Format the appearance of task bars links
- Showing and hiding task bars links
- Dragging linked task bars

12 Critical Path

12.1 What is a critical path?

What is a Critical Path?

In FastTrack Schedule, the critical path is the route between linked bars, in a group of linked bars, with the smallest total slack between tasks. Slack is determined by subtracting a link Minimum lead/lag time from a link duration.

Suppose you have a software project due for delivery in two weeks. In the two weeks before it is due you must accomplish two things: you must write the software and you must create a graphic for the box in which the software will ship. Writing the software will take two weeks; creating the graphic will take one day.

Because you can create the graphic anytime in those two weeks, there is greater elasticity, or slack, to that task. It must happen before the project is due, but it can happen on the last day and still not affect your delivery date. Writing, however, is the more critical task; it cannot slip without affecting your delivery time. Thus, the task "Write" is on the critical path of your schedule.

Because a critical path is defined by the dependency of one task on another, only linked bars are considered part of a critical path.

See also:

- Critical path and bar priority
- Formatting the display of critical path
- Showing and hiding critical paths

12.2 Critical path and bar priority

Critical Path and Task Bar Priority

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Bar priority is a way of ranking linked bars with identical start dates and times so that you direct the application to highlight the chosen critical path. This is the only situation wherein a bar's priority ranking has any affect on the schedule.

To set a bar priority:
1. Double-click on a task bar.
 The Information form opens in the Bars>Tracking tab.
2. In the Priority box, enter a number to indicate the specified bar's priority ranking.
 The higher the Priority number the lower the importance of the task. A priority of "0" means that that task is the most critical. A priority "1" bar is more critical than a priority "2" bar. A bar with no priority ranking (null, the Priority box is empty in the Information form), however, is less important than a priority "2" bar.
3. Click OK to apply your changes and close the Information form.

Notes:
- You can show the Priority column in the Schedule View by inserting it in a layout.
- The Priority column supports up to 9 decimal places. This allows you to add a more critical task to the schedule without needing to renumber every task you have already prioritized. To view Priority values with decimal places, format the Priority column in the Format Column dialog so that it displays decimal places.

See also:
- What is critical path?
- Formatting the display of critical path
- Showing and hiding critical paths

12.3 Formatting the display of a critical path

Formatting the Display of a Critical Path

You control the appearance of the lines that represent the Critical Path. There are critical path displays available in any file. These can be edited to suit your needs.

To format the display of a critical path:
1. In the Schedule View, on the Format tab, in the Display group, click Link.
 The Format Link dialog opens in the Critical Path tab.
2. From the Critical Path Style drop-down list, select a level of critical path.
 -or-
 Click the New button to create a new critical path.
3. Select from the options described below.

To:		Do this:
Change line display		Choose the thickness of the line, and then set the color and pattern of the line that displays the critical path.

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Optimize the appearance of lines when printing with a high-resolution printer.		Select the Optimize Hairlines checkbox.
Change the Arrow display		From the Shape list, in the Arrows area, select the style of arrowhead you would like to display. Then set the arrowhead size, pattern, and color. You do not have to display an arrowhead on the path; it is merely an option.
Change the Path display		Choose to display the path between critical tasks as: a diagonal line, a line that moves over-down-over, or a line that moves down-over-down.

4. Click OK to save your critical path changes and close the Format Link dialog.

Note:
You can choose to show the Critical Path you have formatted on just the links themselves, or on the links and task bars.

See also:
- What is critical path?
- Critical path and bar priority
- Showing and hiding critical paths

12.4 Showing and hiding the critical path

Showing and Hiding the Critical Path

You can select whether or not to display the critical path between tasks in your schedule.

To show critical paths in your schedule:
1. In the Schedule View, on the View tab, in the Show/Hide group, click Critical Paths.
When the critical path is displayed, the Critical Paths button is highlighted in the Show/Hide group.

Notes:
- A critical path displays only if bars in your schedule are linked.
- When formatting your Critical Path you can choose to show the Critical Path on the bars and links, or just the links.

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- When show Critical Path is selected, the critical path or paths in your schedule update instantly as you make changes.

See also:

- What is critical path?
- Critical path and bar priority
- Formatting the display of critical path

13 Information Forms

13.1 Opening the Information form

Opening the Information Form

The Information form has its own Action Column. In the Schedule View, clicking in the Action Column opens the Information form in the Task tab. In the Resource View, the same action column opens the Resource Information form in the Information tab.

To open the Information form in the Schedule View:
1. Click in a row's Information form action column.
 -or-
1. Double-click a bar in the schedule to open the Information form in the Bars>Columns tab.
 -or-
1. Select a schedule row.
2. On the Project tab, in the Details group, click Task Information.
 If resources are assigned to the selected task, you can open their Resource Information forms by clicking Resource Information in the Details group.

To open the Resource Information form in the Resource View:
1. Click in a resource row's Information form action column.
 -or-
1. Select a resource row.
2. On the Project tab, in the Details group, click Resource Information.

See also:

- Working in the row tab of the Information form
- Working in the task bars tab of the information form
- Working in the tracking tab of task bars tab of the information form
- Working in the columns tab of task bars tab of the information form
- Working in the links tab of task bars tab of the information form
- Working in the assignments tab of task bars tab of the information form
- Using Action Columns

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13.2 Working in the Row tab of the Information form

Working in the Row Tab of the Information Form

In the Row tab you have access to data for all of the columns, relating to a particular task, which store data per row rather than per bar.

To enter data in the Row tab:
1. Click in a row Information Form action column.
   The Information form opens in the Row tab.
2. Enter or edit data using the options described below.

This option:		Does this:
Activity Name window		Displays the name of the task whose data is currently being shown in the form. Enter and edit the task name from this window.
Notes tab		
Notes		Enter or edit any notes you have about this task.
Columns tab		
Show		Allows you to select which custom columns will display…
Column Name		Displays the names of any columns whose data is stored per row.
Column Value		Displays the values of any columns whose data is stored per row. If you have defined a value list for a column, that value list will appear when you click in the Value cell.

3. Click OK to apply your changes and close the Information form.

See also:

- Opening the Information forms
- Working in the task bars tab of the information form
- Working in the tracking tab of task bars tab of the information form
- Working in the columns tab of task bars tab of the information form

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- Working in the links tab of task bars tab of the information form
- Working in the assignments tab of task bars tab of the information form
- Using Action Columns

13.3 The Bars>Tracking tab of the Information form

Working in the Tracking Tab of Task Bars Tab of the Information Form

In the Bars>Tracking tab you have access to data that pertains to the movement of a bar, within a particular task.

To enter data in the Bars>Tracking tab of the Information form:
1. Double-click on a task bar.
??The Information form for that bar opens in the Bars> Tracking tab.
2. Enter or edit data using the options described below.

This option:		Does this:
Tracking		
Scheduled Boxes		Show Date, Time, and/or Duration data for the bar's scheduled element.
Revised Boxes		Show Date, Time, and/or Duration data for the bar's revised element.
Actual Boxes		Show Date, Time, and/or Duration data for the bar's actual element. Actual data reflects the % complete.
% Complete		Shows how much of the task represented by the particular bar has been completed. The % complete affects the Actual Dates and Times.
Priority		Indicates the bar's assigned priority.
Constraints		
Constraint Date		Enter or edit the date for all Moderate and Hard Constraint Types.

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Constraint Time		Enter or edit the time for all Moderate and Hard Constraint Types.
Constraint Type		Choose the Constraint that best suits the behavior you would like the task bar to exhibit.
Calendars		
[Calendar select]		Choose what, if any, work calendar, you want to apply to this task.
New		Create a new calendar to apply to the task and choose the existing calendar off of which you would like the new one to be based.
Edit		Opens the Work Calendar dialog so that you can edit the calendar you selected to assign to this task.
Ignore Resource Calendars		When no calendar has been selected, you can choose for the task to ignore the calendars of any resources assigned to it.

3. Click OK to apply your changes and close the Information form.

Note:
The current duration units are displayed under the Duration column. Duration units are changed in the Project tab of the Document Options dialog.

See also:

- Opening the Information forms
- Working in the row tab of the Information form
- Working in the task bars tab of the information form
- Working in the columns tab of task bars tab of the information form
- Working in the links tab of task bars tab of the information form
- Working in the assignments tab of task bars tab of the information form
- Using Action Columns

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13.4 The Bars>Columns tab of the Information form

Working in the Tracking Tab of Task Bars Tab of the Information Form

In the Bars>Columns tab you have access to data for all of the columns, relating to a particular task, which store data per bar rather than per row.

To enter data in the Bars>Columns tab of the Information form:
1. Double-click on a task bar.
   The Information form for that bar opens in the Bars>Columns tab.
2. Enter or edit data using the options described below.

This option:		Does this:
Columns		
Show		Allows you to choose which type of columns to display in the table, e.g. All columns, Calculation columns only, Date columns only.
Name		Displays the names of any columns you have created whose data is stored per bar.
Value		Displays the values of any columns you have created whose data is stored per bar. If you have defined a value list for a column, that value list will appear when you click in the Value cell.

3. Click OK to apply your changes and close the Information form.

See also:

- Opening the Information forms
- Working in the row tab of the Information form
- Working in the task bars tab of the information form
- Working in the tracking tab of task bars tab of the information form
- Working in the links tab of task bars tab of the information form
- Working in the assignments tab of task bars tab of the information form
- Using Action Columns

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13.5 The Bars>Links tab of the Information form

Working in the Links Tab of Task Bars Tab of the Information Form

In the Bars>Links tab you have access to all the information about a task bar's links. You view the information in terms of links to predecessor and successor bars.

To enter data in the Bars>Links tab of the Information form:
1. Double-click on a task bar.
   The Information form for that bar opens in the Bar>Columns tab.
2. Click the Bars>Links tab.
3. Enter or edit the link data in the Predecessors and Successors tables.
4. Click OK to apply your changes and close the Information form.

Go to "Managing Links" for a complete discussion of every option in the Bars>Links tab of the Information form.

See also:

- Opening the Information forms
- Working in the row tab of the Information form
- Working in the task bars tab of the information form
- Working in the tracking tab of task bars tab of the information form
- Working in the columns tab of task bars tab of the information form
- Working in the assignments tab of task bars tab of the information form
- Using Action Columns

13.6 The Bars>Assignments tab of the Information form

Working in the Assignments Tab of Task Bars Tab of the Information Form

In the Bars>Assignments tab you have access to all the information about a task bar's assigned resources.

To enter data in the Bars>Assignments tab of the Information form:
1. Double-click on a task bar.
   The Information form for that bar opens in the Bars>Columns tab.
2. Click the Bars>Assignments tab.
3. Enter or edit the resources assigned to the task.
4. Click OK to apply your changes and close the Information form.

Go to the Assigning resources to bars section for a complete discussion of the Bars>Assignments tab of the Information form.

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See also:

- Opening the Information forms
- Working in the row tab of the Information form
- Working in the task bars tab of the information form
- Working in the tracking tab of task bars tab of the information form
- Working in the columns tab of task bars tab of the information form
- Working in the links tab of task bars tab of the information form
- Using Action Columns

14 Work Calendars

14.1 What is a work calendar?

What is a Work Calendar?

In FastTrack Schedule there are three types of work calendars: project, task and resource. You assign just one work calendar to the project, but any task can be assigned a separate work calendar and every resource has 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 task.

Work Calendars helps you accurately track the amount of time available for work on tasks. Once Work Calendars have been defined, you can use 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 project work times only.
- To help you note assigned resources' non-work periods.

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

This element:		Does this:
[Selected] Calendar		Determines the calendar you assign to a project, task 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.

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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 typical days. Each specific day can have its own set of hours or no hours. For example, you might want to designate holidays as exceptions. Exceptional days are listed in the Exceptions table and can be given a descriptive name.

You can copy and paste a Work Calendar from another file if you would like to use that Work Calendar's arrangement.

What would you like to do?

- Defining and Editing a Work Calendar
- Displaying a Work Calendar
- Calculating Task Bar Durations in Work Units
- Dragging Task Bars Using the Work Calendar

14.2 Defining and editing a work calendar

Defining and Editing a Work Calendar

Defining and editing Work Calendars allows you to determine the hours of the day that are considered work hours for typical and specific days for the project, a task or a resource.

To define or edit a Work Calendar:
1. On the Project tab, in the Details group, click Work Calendars.
The Work Calendars dialog opens.
2. Define the Work Calendars with the options described below.

To select a calendar:
1. In the Work Calendar dialog, use the Calendar drop-down list to 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.

To create a new calendar:
1. In the Work Calendar dialog, click the New button.
2. In the New Work Calendar dialog, enter a name for the new calendar and choose a calendar on which to base the new calendar.

To set the work hours for a Specific day (such as a vacation day):

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1. In the Work Calendars dialog, in the Define Specific Days area, select a year and month to display from the drop-down lists.
 The month appears in the calendar below.
2. Select a day from the calendar.
3. In the Work Shift Details table, enter the periods of time that should be considered work hours for that day.
 -or-
 Click the Create Exception button to remove all work hours from that day.
 All Specific days appear as an item in the Exceptions table to which you can give a descriptive name.
 The total work hours for that specific day appear in the calendar.
4. Click OK to apply your changes and close the Work Calendars dialog.

To set the work hours for a Typical day of the week (such as every Monday):
1. In the Define Typical Week Days area, click on the day of the week for which you want to define typical hours.
2. In the Work Shift Details table, enter the periods of time that should be considered work hours for that day of the week.
 The total number of work hours appears under that day in the Define Typical Week Days area.
3. Repeat this procedure for each day of the week you wish to set.
4. Click OK to apply your changes and close the Work Calendars dialog.

To set the work hours for the Base Work Day (used in calculations):
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, click the Document Options button at the bottom of the menu.
 The FastTrack Schedule Document Options dialog opens.
3. Click the Project tab.
4. In the Calendar Calculations section, in the Hours per Day control, enter the number of hours in a base work day.
 The Base Work Day defines how durations of work hours are calculated.
5. Click OK to apply your changes and close the Document Options dialog.

Notes:
- Only exceptional days are displayed in the calendar shown in the dialog.
- In the Hours area, you must enter periods of time in both the Start and Finish columns. For instance, the default Standard work day is 8:00AM to 12:00PM and 1:00PM to 5:00PM.
- The Copy Day button copies the work shift details for a typical or specific day to the Clipboard. The Paste Day button pastes work shift details from the Clipboard to a typical or specific day.
- The work shift details for a typical day can be pasted to a specific day or vice versa.
- The Copy Calendar button copies the contents of a work calendar to the Clipboard. The Paste Calendar button pastes a Work Calendar from the Clipboard to the open Work Calendar.

See also:
» What is a Work Calendar?

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» Displaying a Work Calendar
» Calculating Task Bar Durations in Work Units
» Dragging Task Bars Using the Work Calendar

14.3 Displaying a work calendar

Displaying a Work Calendar

In the Schedule View timeline you can shade or hide non-work days. You can also set what day a typical week begins or ends on and what hours will be displayed in the schedule.

To shade non-work days in the timeline graph:
1. In the Schedule View, on any tab, in the View group, click the Dialog Box Launcher.
The Format Schedule View dialog opens.
2. In the Display tab, select Days from the Timeline Units drop-down list.
3. Select the Shade Non-Work option.
4. Select the color and/or pattern you would like to shade non-work days.
5. Click OK to apply your changes and close the Format Schedule View.
This fills, with the specified shade pattern and color, the timeline graph columns that have no work hours in them.

To hide non-work days in the timeline graph:
1. In the Schedule View, on any tab, in the View group, click the Dialog Box Launcher.
The Format Schedule View dialog opens.
2. In the Display tab, select "Hours" or "Days" from the Timeline Units drop-down list.
3. Select the Hide Continuous Non-Work/Shade Other option.
4. Select the color and/or pattern you would like to shade other days.
5. Click OK to apply your changes and close the Format Schedule View.
For schedules in base timeline units of days, this hides non-work periods that span 12:00 AM (as defined by Typical and Specific Days), and shades other non-work periods.

Important:
Dragging the middle of a bar when hiding non-work periods can cause task bars to jump when you drag them over non-work periods. This is because dragging the middle of a bar keeps its Duration constant and therefore the bar must lengthen or shorten to account for the hidden periods of time. This helps to avoid scheduling tasks during non-work periods.

To set the day on which a typical week begins or ends:
1. In the Schedule View, on any tab, in the View group, click the Dialog Box Launcher.
The Format Schedule View dialog opens.
2. In the Display tab, deselect the Use the Application Preferences for Weeks Timeline option.
3. Use the Typical Week options to determine on which day a typical week Starts or Ends.
4. Select the day from the drop-down list.
5. Click OK to apply your changes and close the Format Schedule View.

To set the hour display in the timeline:
1. In the Schedule View, on any tab, in the View group, click the Dialog Box Launcher.
The Format Schedule View dialog opens.

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2. In the Display tab, select Hours from the Timeline Units drop-down list.
3. Set the Hour Display Start time and the Hour Display End time.
4. Click OK to apply your changes and close the Format Schedule View.

Note:
Hour Display options are only available when you choose Hours from the Timeline Units pull-down list.

See also:
- What is a Work Calendar?
- Defining and Editing a Work Calendar
- Calculating Task Bar Durations in Work Units
- Dragging Task Bars Using the Work Calendar

14.4 Calculating task bar durations in work units

Calculating Task Bar Durations in Work Units

1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu.
2. In the Application menu, choose Options at the bottom of the menu, and then choose Document Options.
   The FastTrack Schedule Document Options dialog opens.
2. Click the Project tab.
3. In the Units section, Duration Units drop-down list, select a unit.
4. Click OK to apply your changes and close the Document Preferences dialog.

Important:
Dragging the middle of a bar while calculating durations in work units can cause the bar to jump when dragged over non-work periods.

Notes:
- The units in which durations are calculated is set for the entire document (not per column).
- If you draw a new bar entirely within a non-work period, the duration is entered as 0. Therefore, when you drag that bar to a work period, it will have no length.

See also:
- What is a Work Calendar?
- Defining and Editing a Work Calendar
- Displaying a Work Calendar
- Dragging Task Bars Using the Work Calendar

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14.5 Dragging task bars using the work calendar

Dragging Task Bars Using the Work Calendar

In the Schedule View, dragging task bars while using Work Calendar options helps you avoid scheduling tasks during non-work periods by jumping the bar's start point, or end point, over non-work periods.

Dragging bars while Work Calendar options are selected is done in the same manner regardless of work units. The behavior of the bar, however, may be different. When dragging the middle of a bar (not necessarily the start or end points, though), the bar may jump for the following reasons:

Work Calendar option: Hide Continuous Non-Work/Shade Other is selected in Format Schedule View dialog.
- Behavior: Dragging the middle of the bar causes the entire bar to extend or compress over hidden non-work periods.
- Why? Periods of time represented in the duration are hidden, therefore the part of the bar that is over a non-work period is also hidden.

Work Calendar option: Duration Units calculated in a custom Work Calendar instead of a 24-Hour Calendar (set in Document Options dialog).
- Behavior: Dragging the middle of a bar forward to the right causes the end point to jump. Dragging the bar backwards to the left causes the start point to jump.
- Why? When you drag to the right, the Finish is calculated as the Start plus the Duration. Because the Duration is in work units, the Finish must fall in a valid work period. Therefore the end point jumps to the next valid work period. When you drag to the left, the Start is calculated as the Finish minus the Duration and will therefore jump backwards to the next valid work period.

See also:

- What is a Work Calendar?
- Defining and Editing a Work Calendar
- Displaying a Work Calendar
- Calculating Task Bar Durations in Work Units

15 The Calendar View

15.1 What is the Calendar View?

What Is the Calendar View?

The Calendar View displays information from the Schedule View in the traditional look of a wall calendar, though you are not constrained to viewing a month at a time. Time is displayed horizontally in the Schedule and Resource Views, but in the Calendar View it is displayed vertically.

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In the Calendar View you can:

- Draw bars
- Move bars
- Hide bars
- Filter tasks to view only those bars you want to see
- Edit Task bar and milestone scheduled, baseline, and actual dates and times
- Apply Ranges and FastSteps
- Print the calendar in current, monthly, and custom configurations

Note:
Links do not display in the Calendar View.

What would you like to do?

- Formatting the Calendar View
- Formatting the display of the calendar in the Calendar View
- Formatting the display of bars in the Calendar View
- Formatting text in the Calendar View
- Formatting the display of bar labels in the Calendar View
- Formatting the text of bar labels in the Calendar View
- Formatting the appearance of gridlines in the Calendar View
- Printing the Calendar View
- Setting the Calendar View page options

15.2 Formatting the Calendar View

Formatting the Calendar View

Each display element of the calendar can be customized in the Format Calendar View dialog.

To format the display of the Calendar View:
1. In the Calendar View, on any tab, in the View group, click the Dialog Box Launcher.
   -or-
   In the Calendar View, right-click in any cell of the calendar and select Format View.
   The Format Calendar View opens.
2. Click the Display, Range, Font, Bars, Bar Labels or Gridlines tab to format the appearance of that element of the calendar.
3. Click OK to apply your changes and close the Format Calendar View dialog.

See also:

- What is the Calendar View?
- Formatting the display of the calendar in the Calendar View

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- Formatting the display of bars in the Calendar View
- Formatting text in the Calendar View
- Formatting the display of bar labels in the Calendar View
- Formatting the text of bar labels in the Calendar View
- Formatting the appearance of gridlines in the Calendar View
- Printing the Calendar View
- Setting the Calendar View page options

15.3 Formatting the display of the calendar in the Calendar View

Formatting the Display of the Calendar in the Calendar View

You can format the calendar title, the Cell Header style and the shading of each element of the calendar in the Display tab of the Format Calendar View dialog.

To format the display of the calendar in the Calendar View:
1. On any tab, in the View group, click the Dialog Box Launcher.
 -or-
 In the Calendar View, right-click in any cell of the calendar and select Format View.
 The Format Calendar View opens.
2. Click the Display tab.
3. From the Calendar Title Format drop-down list, select the title format you would like to appear at the top of the calendar.
4. From the Cell Header Style drop-down list, select the style in which you would like the Cell Header to appear.
5. From the Shading drop-down list, select the calendar element you wish to shade.
6. Use the Fill Color and Fill Pattern controls to format the display of the shading on the selected element.
7. Click OK to apply your changes and close the Format Calendar View dialog.

See also:

- What is the Calendar View?
- Formatting the Calendar View
- Formatting the display of bars in the Calendar View
- Formatting text in the Calendar View
- Formatting the display of bar labels in the Calendar View
- Formatting the text of bar labels in the Calendar View
- Formatting the appearance of gridlines in the Calendar View
- Printing the Calendar View
- Setting the Calendar View page options

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15.4 Formatting the display of bars in the Calendar View

Formatting the Display of Bars in the Calendar View

Task bars display differently in the Calendar View than they do in the Schedule View. This is due to how they display when wrapping vertically and how they print.

To format the display of bars in the Calendar View:
1. On any tab, in the View group, click the Dialog Box Launcher.
   -or-
   In the Calendar View, right-click in any cell of the calendar and select Format View.
   The Format Calendar View dialog opens.
2. Click the Bars tab.
3. Use the options described below to determine how task bars display in the Calendar View.

This option:		Does This:
Bar and Milestone Styles		
Use Schedule View Bar and Milestone Styles		Makes the bars in your calendar appear as they do in the Schedule View, except the size of the bars, end points, and milestones reflect the size here.
Use Generic Bar		Causes every bar in your schedule to display in a single style in the Calendar View. You select the bar and milestone styles from the drop-down lists.
Options		
Show End Points		Shows or hides bar endpoints to streamline the appearance of the bars in your calendar.
Bar Size		Determines the number of pixels high you would like bars in the calendar to display.
End Point Size		Determines the number of pixels high you would like endpoints in the calendar to display.
Milestone Size		Determines the number of pixels high you would like milestones in the calendar to display.

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Snap Bars to Cell Edge		Begins display of milestones and the endpoints of bars at the edge of a cell rather than the middle.

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

Note:
Bar formatting in the Format Calendar View dialog applies only to the Calendar View. The appearance of bars in the Schedule and Resource Views are not affected.

See also:
- What is the Calendar View?
- Formatting the Calendar View
- Formatting the display of the calendar in the Calendar View
- Formatting text in the Calendar View
- Formatting the display of bar labels in the Calendar View
- Formatting the text of bar labels in the Calendar View
- Formatting the appearance of gridlines in the Calendar View
- Printing the Calendar View
- Setting the Calendar View page options

15.5 Formatting text in the Calendar View

Formatting Text in the Calendar View

You can change the display of calendar text in the Format Calendar View dialog.

To format text in the Calendar View:
1. On any tab, in the View group, click the Dialog Box Launcher.
 -or-
 In the Calendar View, right-click in any cell of the calendar and select Format View.
 The Format Calendar View dialog opens.
2. Click the Font tab.
3. From the Format drop-down list, select which calendar text you wish to format.
4. Use the options to set the font name, size, style, color and justification for the selected text.
5. Click OK to apply your changes and close the Format Calendar View dialog.

See also:
- What is the Calendar View?
- Formatting the Calendar View
- Formatting the display of the calendar in the Calendar View
- Formatting the display of bars in the Calendar View

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- Formatting the display of bar labels in the Calendar View
- Formatting the text of bar labels in the Calendar View
- Formatting the appearance of gridlines in the Calendar View
- Printing the Calendar View
- Setting the Calendar View page options

15.6 Formatting the display of bar labels in the Calendar View

Formatting the Display of Bar Labels in the Calendar View

Labels on bars in the Calendar View are a separate item from the data displayed on bars in the Schedule View and the Resource View's Assignments sub-row.

To format the display of bar labels in the Calendar View:
1. On any tab, in the View group, click the Dialog Box Launcher.
 -or-
 In the Calendar View, right-click in any cell of the calendar and select Format View.
 The Format Calendar View dialog opens.
2. Click the Bar Labels tab.
3. Select or clear the check boxes in the Show column to toggle between showing and hiding the corresponding columns' data on bars in the calendar.
 Every column available in the Schedule View is available in the table.
4. Use the options to set the Background, Line, Shadow and Corner attributes for calendar bar labels.
5. Select or deselect the Wrap Label Text option.
 When this option is deselected, all of the label text may not display.
6. Click OK to apply your changes and close the Format Calendar View dialog.

See also:
- What is the Calendar View?
- Formatting the Calendar View
- Formatting the display of the calendar in the Calendar View
- Formatting the display of bars in the Calendar View
- Formatting text in the Calendar View
- Formatting the text of bar labels in the Calendar View
- Formatting the appearance of gridlines in the Calendar View
- Printing the Calendar View
- Setting the Calendar View page options

15.7 Formatting the text of bar labels in the Calendar View

Formatting the Text of Bar Labels in the Calendar View

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In the Calendar View, bar label text is formatted in the Format Calendar View dialog.

To format the text of bar labels in the Calendar View:
1. On any tab, in the View group, click the Dialog Box Launcher.
 -or-
 In the Calendar View, right-click in any cell of the calendar and select Format View.
 The Format Calendar View dialog opens.
2. Click the Font tab.
3. From the Format drop-down list, select Bar Label.
4. Select the font name, size, style, and justification for calendar bar labels.
5. Click OK to apply your changes and close the Format Calendar View dialog.

See also:

- What is the Calendar View?
- Formatting the Calendar View
- Formatting the display of the calendar in the Calendar View
- Formatting the display of bars in the Calendar View
- Formatting text in the Calendar View
- Formatting the display of bar labels in the Calendar View
- Formatting the appearance of gridlines in the Calendar View
- Printing the Calendar View
- Setting the Calendar View page options

15.8 Formatting the appearance of gridlines in the Calendar View

Formatting the Appearance of Gridlines in the Calendar View

You can change the size and color of the gridlines of the calendar in the Calendar View.

To set bar labels in the Calendar View:
1. On any tab, in the View group, click the Dialog Box Launcher.
 -or-
 In the Calendar View, right-click in any cell of the calendar and select Format View.
 The Format Calendar View dialog opens.
2. Click the Gridlines tab.
3. Use the options described below to format the appearance of gridlines in the Calendar View.

This option:		Does This:
Define Gridlines		
Width		Sets the width of each day cell in the calendar.

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Height		Sets the height of each day cell in the calendar.
Line Color		Determines the color in which calendar gridlines will display.
Line Size		Determines the number of pixels high you would like gridlines in the calendar to display.
Months Separator Line		
Show		When checked, this option displays a line separating the months that are showing in your calendar.
Line Color		Determines the color in which the month separator lines in the calendar will display.
Line Size		Determines the number of pixels high you would like month separator lines in the calendar to display.

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

See also:

- What is the Calendar View?
- Formatting the Calendar View
- Formatting the display of the calendar in the Calendar View
- Formatting the display of bars in the Calendar View
- Formatting text in the Calendar View
- Formatting the display of bar labels in the Calendar View
- Formatting the text of bar labels in the Calendar View
- Formatting the appearance of gridlines in the Calendar View
- Printing the Calendar View
- Setting the Calendar View page options

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15.9 Printing the Calendar View

Printing the Calendar View

The Calendar View yields a hardcopy calendar that is both attractive and functional and displays whatever range of dates you determine.

To print the Calendar View:
1. In the Calendar View, Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Print and choose Print from the submenu.
2. In the Print dialog, choose a printer and click Print.
If you are connected to a printer, this will print the range of dates shown in the Timeline Range in calendar form.
-or-
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Print and choose Print Preview from the submenu.
Use the options in the Print Preview layer to determine the appearance of the printed calendar.
2. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Print and choose Print from the submenu.
3. In the Print dialog, choose a printer and click Print.
If you are connected to a printer, this will print the range of dates shown in the Timeline Range in calendar form.

See also:

- What is the Calendar View?
- Formatting the Calendar View
- Formatting the display of the calendar in the Calendar View
- Formatting the display of bars in the Calendar View
- Formatting text in the Calendar View
- Formatting the display of bar labels in the Calendar View
- Formatting the text of bar labels in the Calendar View
- Formatting the appearance of gridlines in the Calendar View
- Setting the Calendar View page options

15.10 Setting the Calendar View page options

Setting the Calendar View Page Options

The Page Options control how a calendar will print. The Page Options for the Calendar View are different than those available in the Schedule and Resource Views. Because of the vertical orientation of the calendar, special layout and date options are available.

To set the Calendar View Page Options:

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1. In the Calendar View, Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Print and choose Page Options from the submenu.
The Calendar View Page Options dialog opens.
2. Use the options described below to set the printed dates, calendar layout, page margins, and alignment of the printed calendar.

This option:		Does This:
Format		
Full Month Per Page		Prints every month encompassed by the specified range of dates. So, if your specified range was 02/15/07 – 04/12/07, this option will print the complete months of February, March, and April – each on its own page.
Fit to Single Page		Prints a calendar consisting of the specified range of dates on one page; to force the fit, cells are resized and bars can be hidden from view – you should be sure to view this in the Print Preview window before printing.
Current Calendar Layout		Prints the specified range of dates in a calendar with the same cell dimensions as those currently being displayed in the Calendar View – pages break at natural points of division, never mid-cell.
Printed Dates		
Current Start/Finish		Prints a calendar consisting of the days currently shown in the QuickRange Toolbar.
Defined Range		Prints a calendar consisting of the days included in a previously defined Range. Select this range from the drop-down list.
Custom		Prints a calendar consisting of the ranges of dates specified in the Start Date and Finish Date boxes.
Margin		Allows you to determine the number of inches from the top, bottom, right, and left of the printed page to set the calendar.
Alignment		Allows you to determine where along the horizontal and vertical axes of the printed page the calendar will sit.

3. Click OK to apply your changes and close the Calendar View Page Options dialog.

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See also:

- What is the Calendar View?
- Formatting the Calendar View
- Formatting the display of the calendar in the Calendar View
- Formatting the display of bars in the Calendar View
- Formatting text in the Calendar View
- Formatting the display of bar labels in the Calendar View
- Formatting the text of bar labels in the Calendar View
- Formatting the appearance of gridlines in the Calendar View
- Printing the Calendar View

16 Resources and Assignments

16.1 Working with resources

Working with Resources

Tracking who or what is responsible for completing the tasks you are scheduling is one of the most important parts of managing a project. Resources are the people or equipment that help you accomplish the tasks in your schedule. A resource can be anything from a photocopier to a bulldozer to a Chemical Engineer to Jane Doe.

Every resource has a finite amount of time it can be used and effort it can exert. 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.

What do you want to do?

- Understanding the resource Information form
- Creating resources
- Creating and editing a resource work calendar
- Assigning resources to task bars
- Understanding work contours
- Formatting row text in the Resource View
- Formatting rows in the Resource View
- Formatting graph data in the Resource View

- Resource Assignments
- Resource Assignment Spot Allocation
- Resource Assignment Overtime

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16.2 Understanding the resource Information form

Understanding the Resource Information Form

Use the Resource Information form to enter and edit resource information. Though you can enter data directly into the columns of the Resource View, you may not want to display every column. The Resource Information form gives you immediate access to every resource column, hidden or shown.

Using the Information tab of the Resource Information form:
The table below is a breakdown of the options in the Information tab of the Resource Information form.

In this box:		Do this:
Resource Name		Enter a name for the resource as you would like it to display in schedule columns, bar labels and summary graphs. It is a good idea to be as specific as possible, because no two resources can have the same name. For example, typing "Mike" instead of "Mike Stuart" could lead to trouble if another Mike works on the project.
Per Use Cost		Enter a dollar amount that is charged every time this resource is assigned to a task. Think of this as a flat fee paid to use this resource. If this resource is assigned to several tasks in the project, the dollar amount you enter here will be factored into the Total Cost of each task.
Standard Rate		Enter a dollar amount that is calculated per hour, day, week, month, quarter, or year in relation to the task's duration. The default rate is per hour.
Overtime Rate		Enter a dollar amount that is calculated per hour, day, week, month, quarter, or year when the resource works overtime. Entering a "0" means the resource will receive NO overtime pay; leaving this blank means the resource's Overtime Rate is equal to the Standard Rate.
Category		Enter a descriptive word to categorize the resource. For example, you might just enter "Human," if it is a person, or you may want to be more specific and enter something like "Software Developer." This value is for your reference only and does not affect the data in any

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		way. Think about how you would like to use Type information in filters and sorts.
Initials/Code/ Group		Enter data in these fields to assist you in filtering and sorting resource information.
Additional Resource options		Use the additional options to enter detailed contact data for the resource.

Using the Work Calendar tab of the Resource Information form:
Create a work calendar specific to this resource. Create and edit exceptions for specific dates that this resource will not be available.

Using the Other Columns tab of the Resource Information form:
Use this table of additional resource columns to enter more information about the resource.

1. Click in the Value column to the left of the Column Name into which you wish to enter data.
2. Enter a value.

See also:

- Working with resources
- Creating resources
- Creating and editing a resource work calendar
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- Understanding work contours
- Formatting row text in the Resource View
- Formatting rows in the Resource View
- Formatting graph data in the Resource View

- Resource Assignments
- Resource Assignment Spot Allocation
- Resource Assignment Overtime

16.3 Creating resources

Creating Resources

Resources can be created using the Resource Information form.

To create a new resource:
1. In the Resource View, click in the Information Form action column of the selected row.

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The Resource Information form opens.
2. In the Information tab, if you desire, enter name, rate type and contact data about the resource.
3. Click the Work Calendar tab to define the work days and hours of this resource.
4. Click OK to apply your changes and close the Resource Information form.

Note:
By selecting Create Resource from the Resource Name drop-down list, you can also open a new Resource Information form from the Bars>Assignments tab of the Information form.

See also:
- Working with resources
- Understanding the resource Information form
- Creating and editing a resource work calendar
- Assigning resources to task bars
- Understanding work contours
- Formatting row text in the Resource View
- Formatting rows in the Resource View
- Formatting graph data in the Resource View

- Resource Assignments
- Resource Assignment Spot Allocation
- Resource Assignment Overtime

16.4 Creating and editing a resource work calendar

Creating and Editing Resource Work Calendars

Every resource you create in FastTrack Schedule has its own work calendar. Defining a resource work calendar allows you to setup the hours of the day for typical and specific days. If you have a resource that is only available Monday through Wednesday, you can set Thursday - Sunday to be non-work days for that resource, though they are still work days in the Project work calendar.

Use the Resource Information form to determine a resource's work calendar.

To create or edit a resource work calendar:
1. In the Resource View, click in the Information Form action column of the selected row.
The Resource Information form opens.
2. Click the Work Calendar tab.
3. Define the Work Calendar with the options described below.
4. Click OK to apply your changes and close the Resource Information form.

To set the work hours for a Specific day and create Exceptions:

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1. In the Define Specific Days area, select a month and year to display from the drop-down lists.
The month appears in the calendar below.
2. Select a day from the calendar.
3. Click the Create Exception button.
4. Enter a descriptive name for the exception in the Exceptions table.
5. Click out of that day in the calendar to create an exception with "0" work hours, i.e. a full day-off.
-or-
5. Deselect the "Use typical work day shifts on base calendar" option.
6. Edit the Work Shift Details to create an exception with something other than "0" hours.
The total work hours for that specific day appear in the calendar.

To set the work hours for the Typical day of the week (such as Monday):
1. In the Define Typical Week Days area, click on the day of the week for which you want to define typical hours.
2. In the Work Shift Details table, enter the periods of time that should be considered work hours for that day.
The total number of work hours appears under that day in the Define Typical Week Days area.
3. Repeat this procedure for every day you wish to set.

To define the Base Calendar:
1. From the Base Calendar drop-down list, choose Standard (Project Calendar), 24 Hours or Night Shift.

Notes:
- Only specific (non-typical) days are displayed in the calendar in the dialog.
- In the Hours area, you must enter periods of time in both the Start and Finish columns. For instance, the Standard calendar's default work day is 8:00 AM to 12:00 PM and 1:00 PM to 5:00 PM.
- The Copy Day button copies the work shift details for a typical or specific day to the Clipboard. The Paste Day button pastes work shift details from the Clipboard to a typical or specific day. The Copy Calendar button copies the contents of the work calendar to the Clipboard. The Paste Calendar button pastes a work calendar from the Clipboard to a new schedule.
- The work shift details from a typical day can be pasted to a specific day or vice versa.

See also:
- Working with resources
- Understanding the resource Information form
- Creating resources
- Assigning resources to task bars
- Understanding work contours
- Formatting row text in the Resource View
- Formatting rows in the Resource View
- Formatting graph data in the Resource View

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- Resource Assignments
- Resource Assignment Spot Allocation
- Resource Assignment Overtime

16.5 Assigning resources to task bars

Assigning Resources to Task Bars

Assignments link a resource and all its data to a task or tasks in the schedule. The Schedule and Resource Views draw from two different pools of information. Assignments act to bridge 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 and Resource Views cannot interact.

To assign a resource to a bar:
1. In the Schedule View, click in a row's Information Form action column.
 -or-
 In the Schedule View, double-click on the bar or milestone that represents the task to which you want to assign a resource.
 The Information form opens in the Tracking tab.
2. Click the Assignments tab.
3. Use the options described below to assign resources to a task's bar.

With this option:		Do this:
Apply Effort Driven...		Determine whether or not assigning a resource will set the task to be effort driven or to have a fixed duration.
Clear Assignments		Click to clear every assignment in the table.
Assignments table		
		Click the icon to open the Resource Information form for the resource selected in the Resource Name drop-down list.
Resource Name		Select a resource from a drop-down list containing every defined resource that is not already assigned to this task.

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		Or select Create New Resource to define a new resource you want to assign to the bar.
Work (Units)		Edit the number of work units for the task to which you are making an assignment.
% (Effort)		Enter or edit the percentage of the resource's time you want devoted to the specific task.
» Contour		Determine the manner in which this resource's effort will be applied.
Per Use Cost		Enter or edit the dollar amount that will be charged every time this resource is assigned to this particular task. This is a flat fee paid to use this resource. If this resource is assigned to several tasks in the project, it can have different Per Use Costs in every assignment.
Standard Rate		Enter or edit a dollar amount that will be calculated per hour, day, week, month, quarter, or year in relation to the task's duration. The default rate is per hour. Enter "$150.00/d" for the Rate Per Day, "$150.00/w" for the Rate Per Week, etc.
Overtime Rate		Enter or edit a dollar amount that will be calculated per hour, day, week, month, quarter, or year when the resource works overtime. A "0" in this cell means the resource will receive NO overtime pay. This cell blank means the resource's Overtime Rate is equal to its Standard Rate. The default time period is Rate Per Hour.
Cost		View the assignment Cost, where Cost = (Per Use Cost) + (Standard Rate * Duration) + (Overtime Rate * Overtime Duration)

4. Click OK to save your changes and close the Information form.

See also:

» Working with resources

» Understanding the resource Information form

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- Creating resources
- Creating and editing a resource work calendar
- Understanding work contours
- Formatting row text in the Resource View
- Formatting rows in the Resource View
- Formatting graph data in the Resource View

- Resource Assignments
- Resource Assignment Spot Allocation
- Resource Assignment Overtime

16.6 Understanding contours

Understanding Work Contours

Contours allow you to quickly apply a resource's work effort to a task in a manner that best suits your needs.

For example, let's say you are scheduling the creation and distribution of a new software application. As part of that project, you are employing testers. Though some testing can be done as the product is developed, the majority of a tester's work will be done towards the end of development. Therefore when it comes time to assign a tester to a software feature, you would want to choose for that resource the contour "Back Loaded" in the Assignments tab of the Information form. The tester's Percent Work Usage will be low at the beginning of the task and increase gradually until it reaches 100% at the end of the task.

FastTrack Schedule supports the following contouring models:

This Contour:	Looks like this:	Does this:
Flat		Applies the same amount of the resource's effort throughout the task's duration
Back Loaded		Applies more of the resource's effort at the end of the task's duration
Front Loaded		Applies more of the resource's effort at the

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				beginning of the task's duration
Double Peak				Applies the resource's effort so that there is a peak of effort towards the beginning of the task's duration and another peak of effort towards the end of the task's duration.
Late Peak				Applies the resource's effort so that there is a peak of effort towards the end of the task's duration.
Early Peak				Applies the resource's effort so that there is a peak of effort towards the beginning of the task's duration.
Turtle				Applies the resource's effort so that there is a gradual increase of effort as the task progresses and a gradual decrease of effort towards the end of the task's duration.
Bell				Applies the resource's effort so that there is a sharp increase of effort towards the middle of the task's duration with a sharp decrease of effort towards the end of the task's duration.
Custom		[determined by you]		Lets you determine in what manner a resource's efforts will be applied to a task

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See also:

- Working with resources
- Understanding the resource Information form
- Creating resources
- Creating and editing a resource work calendar
- Assigning resources to task bars
- Formatting row text in the Resource View
- Formatting rows in the Resource View
- Formatting graph data in the Resource View

- Resource Assignments
- Resource Assignment Spot Allocation
- Resource Assignment Overtime

16.7 Formatting row text in the Resource View

Formatting Row Text in the Resource View

Formatting text in resource rows allows you to set the font, size, style, justification, and color of text elements in Resource View sub-rows.

To format sub-row text in resource rows:
1. Select the resource row or rows you want to format.
2. Double-click the Row Number action column of the selected resource row or any one of the multiple selected resource rows.
   The Format Resource Row dialog opens.
3. Click the Font tab.
4. From the Format Sub-row drop-down list on top, select the text element to which you want to apply font attributes.
5. In the Font area, set the font, size, style, justification, color, and line spacing.
6. Click OK to apply your changes and close the Format Resource Row dialog.

Note:
Text in columns is formatted in the Format Column dialog.

See also:

- Working with resources
- Understanding the resource Information form
- Creating resources
- Creating and editing a resource work calendar
- Assigning resources to task bars
- Understanding work contours
- Formatting rows in the Resource View

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» Formatting graph data in the Resource View

» Resource Assignments
» Resource Assignment Spot Allocation
» Resource Assignment Overtime

16.8 Formatting rows in the Resource View

Formatting Rows in the Resource View

Formatting resource rows allows you to set the height, background color and pattern, and bottom line color of resource rows.

To open the Format Resource Row dialog:
1. Select the resource row or rows you want to format.
2. Double-click the Row Number action column of the selected resource row or any one of the multiple selected resource rows.
The Format Resource Row dialog opens.
3. In the Display tab, from the Format Sub-row drop-down list, select the part of the resource row you wish to change the display of.
4. Select from the options described below.

This Option:		Does this:
Row Background Attributes:		
Display Location		Allows the color and pattern you have selected to display on: columns only, the timeline only, both the columns and the timeline, or not at all.
Color		Allows you to set a background color to display in the resource row as a whole or in the specified sub-row.
Pattern		Allows you to set a background pattern to display in the resource row as a whole or in the specified sub-row.
Bottom Line Attributes:		
Display Location		Allows the color you have selected to display beneath: columns only, the timeline only, both the columns and the timeline, or not at all.

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Color		Allows you to set a bottom line color to display in the resource row as a whole or in the specified sub-row.
Size		Set the size, or thickness, of the bottom line.
Height:		(only available when formatting a resource sub-row)
Expanded		Determines at what row height the resource sub-row will display when it is expanded.
Collapsed		Determines at what row height the resource sub-row will display when it is collapsed or hidden.
Options:		
Page Break After this Row		Sets a page break after the resource you are currently formatting.
Show Scale		Displays the scale for the graph.
Show Parent Tree		Displays the contents of the Parent Tree column (the task preceded by all of its parents) in the Assignments sub-row.

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

Notes:
- If you are formatting several rows at once, selecting Page Break After this Row will put a page break after each row.
- Clicking the Set as Default button makes the selected settings the default for all new resource rows.
- Formatting of rows can also be done in the Font and Graph tabs.

See also:
- Working with resources
- Understanding the resource Information form
- Creating resources
- Creating and editing a resource work calendar
- Assigning resources to task bars
- Understanding work contours
- Formatting row text in the Resource View

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» Formatting graph data in the Resource View

» Resource Assignments
» Resource Assignment Spot Allocation
» Resource Assignment Overtime

16.9 Formatting graph data in the Resource View

Formatting Graph Data in the Resource View

Formatting the appearance of graphs in the Resource View's Percent Usage and Time Usage sub-rows allows you to customize the look of many aspects of each graph.

To format graph data in resource rows:
1. Select the resource row or rows you want to format.
2. Double-click the Row Number action column of the selected resource row or any one of the multiple selected resource rows.
The Format Resource Row dialog opens.
3. Click the Graph tab.
4. From the Format Sub-row drop-down list, select the graph to which you want to apply attributes.
5. In the Section area drop-down list, select the section of the graph to which you want to apply attributes.
6. Set the color and pattern attributes for the selected graph section.
7. Select or clear the Show Outline checkbox.
8. If you selected to show the outline, set the color, pattern, and outline size for the outline of the selected graph section.
9. In the 100% Line area, select a color and size for the 100% line in the graph.
The 100% line marks the maximum amount of time or usage available.
10. Click OK to apply your changes and close the Format Resource Row dialog.

See also:
» Working with resources
» Understanding the resource Information form
» Creating resources
» Creating and editing a resource work calendar
» Assigning resources to task bars
» Understanding work contours
» Formatting row text in the Resource View
» Formatting rows in the Resource View

» Resource Assignments
» Resource Assignment Spot Allocation
» Resource Assignment Overtime

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16.10 Resource Assignments

Resource Assignments

Assignments link a resource and all its data to a task or tasks in the schedule. The Schedule and Resource Views draw from two different pools of information. Assignments act to bridge 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 and Resource Views cannot interact.

See also:

- Working with resources
- Understanding the resource Information form
- Creating resources
- Creating and editing a resource work calendar
- Assigning resources to task bars
- Understanding work contours
- Formatting row text in the Resource View
- Formatting rows in the Resource View
- Formatting graph data in the Resource View

- Resource Assignment Spot Allocation
- Resource Assignment Overtime

16.11 Resource Assignment Spot Allocation

Resource Assignment Spot Allocation

Spot allocation is the act of editing a portion of an assigned resource's total Time Usage (i.e. Hourly, Daily, etc.) in the Assignments sub-row of the Resource View. Spot allocation is based on the Resource View timeline units as you have currently defined them (i.e. Work Hours, Work Days, etc.).

A spot allocation example:
If, on Wednesday the 21st and Thursday the 22nd, resource Ann Parker is assigned to work 8 hours on the task "Design" and 8 hours on the task "Prototype", she has a total Hourly Usage on those days of 16 hours. Because you have defined her typical work day as being 8 hours in length, Ann Parker is over allocated on the 21st and 22nd. The solution is to spot allocate her hours directly in the Resource View timeline.

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Simply click to select the display of Wednesday the 21st and Thursday the 22nd's hours, which are shown below the bar representing the task "Design" in the Assignments sub-row. Change the hours for both days from "8.00" to "4.00". Now do the same to the hours of Wednesday the 21st and Thursday the 22nd for the "Prototype" task bar. Ann now works 4 hours on each assignment. The end result is that her total Hourly Usage for Wednesday the 21st and Thursday the 22nd is now 8 hours.

See also:

- Working with resources
- Understanding the resource Information form
- Creating resources
- Creating and editing a resource work calendar
- Assigning resources to task bars
- Understanding work contours
- Formatting row text in the Resource View
- Formatting rows in the Resource View
- Formatting graph data in the Resource View

- Resource Assignments
- Resource Assignment Overtime

16.12 Resource Assignment Overtime

Resource Assignment Overtime

Several factors are involved in calculating overtime for an assigned resource.

Percent Effort: When you use Percent Effort values, anything over 100% effort is overtime. You enter and edit the Percent Effort a resource will expend on a particular task in the Bars>Assignments tab of the Information form.

Spot allocation: When you change a resource's Time Usage (i.e. Hourly, Daily, etc.) by spot allocating, the changes are calculated in relation to the units of the Resource View timeline such as you have defined them (i.e. Hours, Days, etc.). If the Resource View timeline units are in work time, any Time Usage that exceeds the typical work time you have defined for the unit is overtime. If the Resource View timeline units are in calendar time, any Time Usage that exceeds the absolute time in that unit is overtime usage. For example, allocating more than 24 hours of usage to a unit of 1 calendar day will result in overtime usage.Note:You determine a resource's overtime rate, if any, in the Resource Information form or in the

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Bars>Assignment tab of the Information form. (Overtime rates entered in the Bars>Assignment tab apply only to the assigned task.)

See also:

- Working with resources
- Understanding the resource Information form
- Creating resources
- Creating and editing a resource work calendar
- Assigning resources to task bars
- Understanding work contours
- Formatting row text in the Resource View
- Formatting rows in the Resource View
- Formatting graph data in the Resource View

- Resource Assignments
- Resource Assignment Spot Allocation

17 Layouts

17.1 What is a Layout?

What is a Layout?

Using Layouts, you can create different groupings of columns and change between them quickly and easily. Layouts are available in the Schedule and Resource Views. Layouts show, hide, and move columns, the timeline graph, Action Columns, timescale areas, (in the Schedule View) summary graphs, and (in the Resource View) resource sub-rows. You cannot apply Layouts created in the Schedule View to the Resource View or vice-versa.

Select one of the following topics:

- Defining a layout
- Deleting a layout
- Duplicating a layout
- Applying a layout

17.2 Defining a Layout

Defining a Layout

Defining a Layout allows you to create and edit views of the Schedule and Resource Views. Layouts are created and edited in the Layouts and Define Layout dialogs.

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To open the Define Layout dialog:
1. On the Project tab, in the Layout group, click Layouts and choose Define from the drop-down list.
The Layouts dialog opens.
2. Click the New button to design a new layout.
-or-
Click the Edit button to edit the existing layout you select from the Layouts table.
The Define Layout dialog opens.

In the Columns tab of the Define Layout dialog (Schedule and Resource Views):
1. In the Layout Name box, enter or edit the layout name.
2. From the Available Columns table, select a column name.
3. Click the Show button to send the column to the Shown Columns table.
4. Repeat this process until all the columns you want to include in the layout are in the Shown Columns table.
-or-
Click the Hide button to remove a column from the Shown Columns table.
5. If you wish, click and drag on column names in the Shown Columns table to change the order of columns in the layout.
You can place columns on either side of the timeline graph.
6. If you wish, click in the Lock column to lock or unlock the column.
Locking a column prevents it from scrolling out of the window. It can be used for setting the left and right scroll boundaries of the schedule.
7. Select Column Headings & Timescale (Top) to display column headings and the top timescale area.
8. Select Column Summaries & Timescale (Bottom) to display column summaries and a bottom timescale area.
9. Select Mirror Timescale from Top to display a bottom timescale that mirrors the top timescale.
Column Headings and Timescale (Top) must be selected if you want to mirror the top timescale.

To display summary graphs (Schedule View only):
1. Click the Summary Graphs tab of the Define Layout dialog.
Any summary graphs you have created appears in the Available Rows table.
2. Click Show to send the summary graph to the Shown Rows table.
3. If you wish, click and drag on summary graph row names in the Shown Rows table to change the order of rows in the layout.
-or-
1. Click the Create New Summary Graph Row button to create a new summary graph and open the Format Summary Graph dialog.

Notes:
- Use the Hide and Hide All buttons to remove Summary Graph rows from the Shown Rows table.
- The Shown Columns table displays the left-to-right order of columns.

See also:
» What is a layout?

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» Deleting a layout
» Duplicating a layout
» Applying a layout

17.3 Deleting a Layout

Deleting a Layout

Layouts can be deleted in the Layouts dialog.

To delete a Layout:
1. On the Project tab, in the Layout group, click Layouts and choose Define from the drop-down list.
   The Layouts dialog opens.
2. Select the layout you wish to delete.
3. Click the Delete button.
   A confirmation dialog appears asking you to verify that the layout will be deleted.
4. Click OK to delete the layout or Cancel to retain the layout.
   If you delete the layout, it will no longer be available from the Layouts drop-down list.
5. Click OK to close the Layouts dialog and apply the layout that is currently selected.
   -or-
   Click Close to close the Layouts dialog without applying a layout.

See also:
» What is a layout?
» Defining a layout
» Duplicating a layout
» Applying a layout

17.4 Duplicating a Layout

Duplicating a Layout

Layouts can be duplicated in the Layouts dialog.

To duplicate a Layout:
1. On the Project tab, in the Layout group, click Layouts and choose Define from the drop-down list.
   The Layouts dialog opens.
2. Select the layout you wish to duplicate.
3. Click the Duplicate button.
   The Define Layout dialog opens.
4. Edit the new layout.
5. Click OK to save the layout and close the Define Layout dialog.
6. Click OK to close the Layouts dialog and apply the layout that is currently selected.

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-or-
Click Close to close the Layouts dialog without applying a layout.

See also:
- What is a layout?
- Defining a layout
- Deleting a layout
- Applying a layout

17.5 Applying a Layout

Applying a Layout

Applying a Layout is a shortcut to showing, hiding, and moving elements of the Schedule and Resource Views.

To apply a layout:
1. On the Project tab, in the Layout group, click Layouts and choose the layout you wish to apply from the drop-down list.

See also:
- What is a layout?
- Defining a layout
- Deleting a layout
- Duplicating a layout

18 Reports

18.1 What is a Report?

What Is a Report?

The new Reports feature in FastTrack Schedule 2026 combines all the software's presentation components into one, intuitive tool for the creation of attractive and comprehensive reports. Create, customize, name, and save Reports for amazing presentations and in-depth project analysis. The Reports feature gives you complete control over all aspects of FastTrack Schedule Report creation and customization including: Filters, Layouts, Sorts, Ranges, graphic items, Critical Paths, zoom, and more. Once a Report is created, easily name and save it for future use.

Reports can be created and used in the Schedule and Resource Views. You cannot apply Reports created in the Schedule View to the Resource View and vice-versa.

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Select one of the following topics:
- Defining a report
- Deleting a report
- Duplicating a report
- Applying a report

18.2 Defining a Report

Defining a Report

Defining a Report allows you to create and edit presentations of the Schedule and Resource Views. Reports are created and edited in the Reports and Define Report dialogs.

To open the Define Report dialog:
1. On the Project tab, in the Report group, click Reports and choose Define from the drop-down list.
   The Reports dialog opens.
2. Click the New button to design a new Report.
   -or-
   Click the Edit button to edit the existing report you select from the Reports table.
   The Define Report dialog opens.

Here are the options available when configuring the Report:
1. Name the Report.
2. Project Options: Choose Duration Units, Work Units, and Active Baseline.
3. Select the shown Outline Levels.
4. View: Select the Zoom Level and Auto-Fit View.
5. Select the Layout to apply.
6. Select the Filter to apply.
7. Select the Sort to apply.
8. Select the Range of the Timeline Graph.
9. Show/Hide Summary Tasks, the Resource Percent Usage graph, and the Timeline Graph.
10. Hide/Unhide Action Columns: Row Number, Page Break, Information, Outline.
11. Timeline Graph: show/hide Links, Critical Path, Datelines, Alignment Grid, Pictures, Textboxes, and Legends.
12. Choose Bar Components to show.
13. Choose Timescale Units.

Press OK to create Report.

See also:
- What is a report?
- Deleting a report
- Duplicating a report
- Applying a report

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18.3 Deleting a Report

Deleting a Report

Reports can be deleted in the Reports dialog.

To delete a Report:
1. On the Project tab, in the Report group, click Reports and choose Define from the drop-down list.
   The Reports dialog opens.
2. Select the Report you wish to delete.
3. Click the Delete button.
   A confirmation dialog appears asking you to verify that the Report will be deleted.
4. Click OK to delete the Report or Cancel to retain the Report.
   If you delete the Report, it will no longer be available from the Reports drop-down list.
5. Click OK to close the Reports dialog and apply the Report that is currently selected.
   -or-
   Click Close to close the Reports dialog without applying a Report.

See also:

- What is a report?
- Defining a report
- Duplicating a report
- Applying a report

18.4 Duplicating a Report

Duplicating a Report

Reports can be duplicated in the Reports dialog.

To duplicate a Report:
1. On the Project tab, in the Report group, click Reports and choose Define from the drop-down list.
   The Reports dialog opens.
2. Select the Report you wish to duplicate.
3. Click the Duplicate button.
   The Define Report dialog opens.
4. Edit the new Report.
5. Click OK to save the Report and close the Define Report dialog.
6. Click OK to close the Reports dialog and apply the Report that is currently selected.
   -or-
   Click Close to close the Reports dialog without applying a Report.

See also:

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» What is a report?
» Defining a report
» Deleting a report
» Applying a report

18.5 Applying a Report

Applying a Report

Applying a report is a shortcut to showing, hiding, and moving elements of the Schedule and Resource Views.

To apply a report:
1. On the Project tab, in the Report group, click Reports and choose the report you wish to apply from the drop-down list.

See also:

» What is a report?
» Defining a report
» Deleting a report
» Duplicating a report

19 Printing & Previewing

19.1 Working with Print Preview

Working with Print Preview

Print Preview is a separate window in the application that displays the pages of the Schedule, Calendar, or Resource Views just as they will appear when printed. Print Preview is also interactive – it allows you to add pictures, autotext stamps, headers and footers, and other information to an overlay layer that does not affect the contents of the Schedule, Calendar, or Resource Views.

In addition to displaying printed schedules, Print Preview allows you to export an image of the printed page onto the Clipboard or to a file. This allows you to then paste this image into another application for use there: for instance, a page layout application, word processor, or other presentation application. You can also send the file via email to someone for viewing or display on a website

See also:

» Using Print Preview

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- Adding Print Headers and Footers
- Inserting Page #, Date, Time, and File Name (AutoText)
- Adding Titles and Pictures to Print Preview
- Fitting the Document to a Number of Pages
- Making a Wall Chart
- Breaking Printed Pages at Rows
- Printing Schedules
- Choosing Page Options
- Setting Up the Page
- Exporting the Page as a Picture

19.2 Using Print Preview

Using Print Preview

Print Preview allows you to see how each page of a specified View will print before you send it to a printer. Headers, footers, and pictures added to the Print Preview window will appear when you print the page or export a picture of the page. Pictures, legends and text stamps are not supported in the Print Preview window of the Calendar View.

To open Print Preview:
1. On the Quick Access toolbar, click the Print Preview icon.

The Quick Access toolbar is located beside the Application Button which is the graphic at the top left of the FastTrack Schedule window.

To view a different page in the Print Preview window:
1. On the Format bar, click the Previous Page or Next Page to navigate to the page you would like to view.

To see the printable area of the page (to make sure items are not clipped):
1. On the Format bar, select the Printable Area option.

You are in Actual Size when the view of your schedule is 100%. If you are zoomed in less than 100%, your schedule will automatically resize to the size of the Print Preview window.

To zoom in and out of the Fit-in-Window and Actual Size view:
1. In the Zoom group, click Zoom In or Zoom Out.

To view a different part of the schedule when in Actual Size view:
1. Click and drag the page image to see a different area.

To close the Print Preview window:
1. In the Preview group, click Close.

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See also:

- Working with Print Preview
- Adding Print Headers and Footers
- Inserting Page #, Date, Time, and File Name (AutoText)
- Adding Titles and Pictures to Print Preview
- Fitting the Document to a Number of Pages
- Making a Wall Chart
- Breaking Printed Pages at Rows
- Printing Schedules
- Choosing Page Options
- Setting Up the Page
- Exporting the Page as a Picture

19.3 Adding print headers and footers

Adding Print Headers and Footers

Each View (Schedule, Resource, and Calendar) can have a header and footer that appear when you print that View or use the Print Preview window of that View. This allows you to include information such as the file name, date, and page number on printed pages.

To add headers and footers:
1. In the Schedule, Calendar or Resource View,on the Insert tab, in the Page group, click Header & Footer.
 -or-
 In Print Preview, from the Page group, click Header & Footer.
 The Header and Footer dialog opens.
2. From the Format drop-down list, select Header or Footer.
3. Select a cell in the left, center, or right table into which you want to place information.
4. From the Insert into Cell drop-down list, select one of the pre-defined pieces of data.
 -or-
 Enter custom information into the left, center, or right table.
5. From the Display Options drop-down list, select which pages the data will display on.
6. If you wish, click the Font button to define the textual appearance of data in the cell.
7. Click OK to apply your font styles and close the Font dialog.
8. Click OK to apply your changes and close the Header and Footer dialog.

Notes:
- Each table can contain multiple pieces of data. The Copy All button copies every piece of data from the Header and Footer tables to the Clipboard. The Paste All button pastes Header and Footer data from the Clipboard. You can copy and paste between similar files.
- You can remove headers or footers anytime by simply deleting the text from the Left, Center, or Right tables.

See also:

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- Working with Print Preview
- Using Print Preview
- Inserting Page #, Date, Time, and File Name (AutoText)
- Adding Titles and Pictures to Print Preview
- Fitting the Document to a Number of Pages
- Making a Wall Chart
- Breaking Printed Pages at Rows
- Printing Schedules
- Choosing Page Options
- Setting Up the Page
- Exporting the Page as a Picture

19.4 Inserting page #, date, time, and file name

Inserting Page #, Date, Time, and File Name (AutoText)

Inserting autotext allows you to include a dynamic page number, date, time, and file name and path in the Print Preview windows of the Schedule and Resource Views. This information will appear when the document is printed. You can also use headers and footers to include this data on the printed document. Headers and Footers allow you to format the display of the items.

To insert items in the Print Preview window:
1. In Print Preview, from the Page Items group, click Insert and choose Page Number.
 -or-
 In Print Preview, from the Page Items group, click Insert and choose Date.
 -or-
 In Print Preview, from the Page Items group, click Insert and choose Time.
 -or-
 In Print Preview, from the Page Items group, click Insert and choose File Name and Path.

To change the display of an inserted autotext item in the Print Preview window:
1. Click the item to select it.
2. From the Page Items group, click Format Selected.
 -or-
 Right-click on the item and select Format.
 The Format Item dialog opens.
3. Use the options to change the display of the item.
4. Click OK to apply your changes and close the Format Item dialog.

To define what pages an inserted autotext item is displayed on:
1. Click the item to select it.
2. From the Page Items group, click Format Selected.
 The Format Item dialog opens.

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3. In the Display tab, use the Show On options to display the item on all pages, the current page only, or a range of pages.
4. Click OK to close the Format Item dialog.

Note:
Inserted items appear in the middle of the Print Preview window. Use the Arrow tool to drag the item to a different location.

See also:
- Working with Print Preview
- Using Print Preview
- Adding Print Headers and Footers
- Adding Titles and Pictures to Print Preview
- Fitting the Document to a Number of Pages
- Making a Wall Chart
- Breaking Printed Pages at Rows
- Printing Schedules
- Choosing Page Options
- Setting Up the Page
- Exporting the Page as a Picture

19.5 Adding titles and pictures to Print Preview

Adding Titles and Pictures to Print Preview

Adding text boxes and pictures (both called items) to Print Preview allows you to add titles and images that are only displayed on printed pages. Pictures, legends and text boxes are not supported in the Print Preview window of the Calendar View.

To add a text box to the Print Preview window:
1. In Print Preview, from the Page Items group, click Insert and choose Insert Text Box from the drop-down list.
2. Drag the text box to place it in the desired location.
4. Enter the text in the text box and it will resize to fit the text.

To add a picture to Print Preview:
1. In Print Preview, from the Page Items group, click Insert and choose Insert Picture from the drop-down list.
The Insert Picture dialog opens.
2. In the Insert Picture dialog, choose to insert a picture you've previously saved to the Clipboard, or browse to find the picture you want to insert.
3. Click OK to close the Insert Picture dialog and insert your picture.
4. Drag the picture to place it in the desired location.

To define which pages an item displays on:

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1. Click the item to select it.
2. From the Page Items group, click Format Selected.
   The Format Item dialog opens.
3. In the Display tab, use the Show On options to display the item on all pages, the current page only, or a range of pages.
4. Click OK to close the Format Item dialog.

See also:

- Working with Print Preview
- Using Print Preview
- Adding Print Headers and Footers
- Inserting Page #, Date, Time, and File Name (AutoText)
- Fitting the Document to a Number of Pages
- Making a Wall Chart
- Breaking Printed Pages at Rows
- Printing Schedules
- Choosing Page Options
- Setting Up the Page
- Exporting the Page as a Picture

19.6 Fitting the document to a number of pages

Fitting the Document to a Number of Pages

Fitting the schedule to a number of pages allows you to determine how many pages wide you would like the printed Schedule or Resource Views to be and automatically resizes the timeline graph columns to make the schedule the appropriate width. This only affects the number of pages horizontally, not vertically. This does not scale the output. The Calendar View has a unique Page Options dialog to which the procedures detailed below do not apply.

To fit the printed Schedule View or Resource View to a number of pages wide:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Print and choose Page Options from the submenu.
   The Page Options dialog opens.
2. From the Format drop-down list, select Fit to Pages (Width).
3. Enter a value in the Number of Pages Across box.
   For instance, if you enter the value 2, the document fits to span 2 pages.
4. Click OK to apply your changes and close the Page Options dialog.

Notes:
- When Fit to Pages (Width) is selected, you will not be able to resize the timescale and columns in the timeline – as the application automatically defines their width.

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- For large schedules, fitting to a small number of pages may cause the timeline columns to contract to a size too small to display timescale labels. Either choose a larger number of pages or hide columns to gain more space.

See also:

- Working with Print Preview
- Using Print Preview
- Adding Print Headers and Footers
- Inserting Page #, Date, Time, and File Name (AutoText)
- Adding Titles and Pictures to Print Preview
- Making a Wall Chart
- Breaking Printed Pages at Rows
- Printing Schedules
- Choosing Page Options
- Setting Up the Page
- Exporting the Page as a Picture

19.7 Making a wall chart

Making a Wall Chart

Making a wall chart prints the Schedule View or Resource View in such a way that the pages, which are completely separate in a standard layout, can be pieced together to form one large page. This allows you to use a small printer to create a large wall chart. The Calendar View has a unique Page Option dialog to which the procedures detailed below do not apply.

To define the schedule as a wall chart:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Print and choose Page Options from the submenu.
   The Page Options dialog opens.
2. From the Format drop-down list, choose Wall Chart (Tiled).
3. Use the options that appear to define a border around the schedule.
4. Click OK to create the wall chart and close the Page Options dialog.

To view the wall chart:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Print and choose Print Preview from the submenu.
2. To view the wall chart as it will look when pieced together, select the All Pages checkbox from the Page Map Toolbar.

To piece together the wall chart:
1. Print all pages of the wall chart.
2. Cut the right and bottom edge off of each page except the pages that form the right and bottom of the Wall Chart.
3. Tape together seams.

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Hint:
Cut the pages flush to the very edge of the printing.

See also:

- Working with Print Preview
- Using Print Preview
- Adding Print Headers and Footers
- Inserting Page #, Date, Time, and File Name (AutoText)
- Adding Titles and Pictures to Print Preview
- Fitting the Document to a Number of Pages
- Breaking Printed Pages at Rows
- Printing Schedules
- Choosing Page Options
- Setting Up the Page
- Exporting the Page as a Picture

19.8 Breaking printed pages at rows

Breaking Printed Pages at Rows

In the Schedule and Resource Views, breaking the printed page at a row allows you to determine where the pages break and which row is the last on the page.

To break a page at a specific row:
1. If it is displayed, click in the Page Break action column of the desired row.
-or-
1. Select the desired row and from the Insert menu, select Page Break.
-or-
1. In the Schedule View, select the row that you want to be the last on a printed page.
2. On the Format tab, in the Display group, click Format Selected.
The Format Row dialog opens.
3. In the Display tab, select the Page Break After this Row checkbox.
4. Click OK to apply your changes and close the Format Row dialog.

To break a page at a specific resource row:
1. If it is displayed, click in the Page Break action column of the desired row.
-or-
1. Select the desired row and from the Insert menu, select Page Break.
-or-
1. In the Resource View, select the row that you want to be the last on a printed page.
2. On the Format tab, in the Display group, click Format Selected.
The Format Resource Row dialog opens.
3. In the Display tab, select the Page Break After this Row option.
4. Click OK to apply the page break and close the Format Resource Row dialog.

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Note:
You can also define that no partial rows (broken rows) are printed at the bottom of the page by selecting the Break Page at Rows option in the Page Options dialog of the Schedule View or Resource View.

See also:
- Working with Print Preview
- Using Print Preview
- Adding Print Headers and Footers
- Inserting Page #, Date, Time, and File Name (AutoText)
- Adding Titles and Pictures to Print Preview
- Fitting the Document to a Number of Pages
- Making a Wall Chart
- Printing Schedules
- Choosing Page Options
- Setting Up the Page
- Exporting the Page as a Picture

19.9 Printing schedules

Printing Schedules

Printing a schedule outputs your schedule to a printer, creating a hard copy.

To print a schedule:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Print and choose Print from the submenu.
   If you are connected to a printer, this will print the schedule.

See also
- Working with Print Preview
- Using Print Preview
- Adding Print Headers and Footers
- Inserting Page #, Date, Time, and File Name (AutoText)
- Adding Titles and Pictures to Print Preview
- Fitting the Document to a Number of Pages
- Making a Wall Chart
- Breaking Printed Pages at Rows
- Choosing Page Options
- Setting Up the Page
- Exporting the Page as a Picture

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19.10 Choosing page options

Choosing Page Options

Choosing page options allows you to fine tune the form, margins, and display of the printed schedule. The Calendar View has a unique Page Options dialog to which the procedures detailed below do not apply.

To select Page Options for the Schedule View or Resource View:
1. In the Schedule or Resource View, Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Print and choose Page Options.
-or-
In Print Preview, in the Printing group, click Page Options.
The Page Options dialog opens.
2. Select from the options described below.

To do this:		Do this:
Format		
Print pages normally		From the Format drop-down list, select Standard.
Print a Wall Chart		From the Format drop-down list, select Wall Chart (Tiled).
Fit to a specific number of pages		From the Format drop-down list, select Fit to Pages (Width).
Alignment		
Align on the printed page		From the Alignment area, choose Left, Center, or Right.
Margin		
Offset from page edge		Enter Top, Left, Right, and Bottom margins.
Standard Options		
Print the pages in reverse order		Select Print Back to Front.

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Print row numbers		Select Print Row Numbers.
Allow only full rows		Select Break Page at Rows
Allow only full columns		Select Break Page at Columns
Repeat on Every Page		
Print columns on each page		Select Left Locked Columns and/or Right Locked Columns
Print timescales on each page		Select Top Headings and/or Bottom Headings.
Blank Rows		
Add a number of blank rows and then fill the last page with blank rows, UNLESS the number of rows needed to fill the last page exceeds the maximum number of rows set below.		Enter a Minimum value.
Set the maximum number of blank rows that can be added to the schedule. The last page of the schedule will not fill with rows if it exceeds this number.		Enter a Maximum value.

3. Click OK to apply your changes and close the Page Options dialog.

See also:

- Working with Print Preview
- Using Print Preview
- Adding Print Headers and Footers
- Inserting Page #, Date, Time, and File Name (AutoText)
- Adding Titles and Pictures to Print Preview
- Fitting the Document to a Number of Pages

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- Making a Wall Chart
- Breaking Printed Pages at Rows
- Printing Schedules
- Setting Up the Page
- Exporting the Page as a Picture

19.11 Setting up the page

Setting Up the Page

Page Setup defines how the schedule appears on the printed page. Your selected printer determines the options in the Page Setup dialog. Commonly, there are options for orientation, paper size, and for Postscript printers, scaling.

To use Print Setup:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Print and choose Print Setup.
2. Select either the portrait (vertical) or landscape (horizontal) orientations.
3. Select the size of the paper.
4. Select special print options.
5. Click OK to print the schedule and close the dialog.

Hint:
Most schedules print best in landscape (horizontal) orientation.

See also:
- Working with Print Preview
- Using Print Preview
- Adding Print Headers and Footers
- Inserting Page #, Date, Time, and File Name (AutoText)
- Adding Titles and Pictures to Print Preview
- Fitting the Document to a Number of Pages
- Making a Wall Chart
- Breaking Printed Pages at Rows
- Printing Schedules
- Choosing Page Options
- Exporting the Page as a Picture

19.12 Exporting the page as a picture

Exporting the Page as a Picture

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Exporting the page image as a picture allows you to use it in other documents (such as reports and presentations) or display it on a web page as a simple graphic. You can determine exactly how the page is exported using the Export as Picture dialog.

When you select Export Picture from within the Print Preview window, the document (or portions thereof) that appears on the currently selected page is exported. When you select Export Picture from outside of the Print Preview window, the entire View (regardless of pages) is exported.

The file types are: Windows Bitmap (BMP), Windows Enhanced Metafile (EMF), JPEG/JFIF (JPG), Portable Network Graphic (PNG), Tagged Image File Format (TIF), Mac PICT (PCT)

To export the page of the specified View as a picture:
1. In the Quick Access toolbar, click the Print Preview icon.
2. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Export, and choose Picture from the submenu.
 The Export as Picture dialog opens.
3. Choose to export the picture to the Clipboard or a File.
 If necessary, use the Browse button to navigate to a file on disk and choose the file name, location, and, on Windows, what type of file to save as.
4. To export just the schedule, resource, or calendar portion of the current page, select Export Document Only.
 -or-
 To export the schedule, resource, or calendar portion, the text boxes and graphics, and the image of the paper on the current page, select Export Document and Paper.
 -or-
 To export the schedule, resource, or calendar portion and the items on the current page, select Export Document and Page Items.
5. Click OK to export the picture and close the Export as Picture dialog.

To export the entire View as a picture:
1. Close the Print Preview window (if open).
2. Start Backstage with the File tab at the top left of the FastTrack Schedule window, select Export, and choose Picture from the submenu.
 This exports the entire View (Schedule, Resource, or Calendar), regardless of pages or Print Preview items.

See also:

- Working with Print Preview
- Using Print Preview
- Adding Print Headers and Footers
- Inserting Page #, Date, Time, and File Name (AutoText)
- Adding Titles and Pictures to Print Preview
- Fitting the Document to a Number of Pages
- Making a Wall Chart
- Breaking Printed Pages at Rows
- Printing Schedules

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» Choosing Page Options
» Setting Up the Page

20 Filters & Sorts

20.1 Working with Filters and Sorts

Working with Filters and Sorts

Filtering uses search criteria that you define to identify information in rows, task bars and resource rows. It then allows you to apply Filters to the Schedule, Resource, and Calendar Views to hide or select tasks or resources that match the criteria. Because the Calendar View uses the same data as the Schedule View, filters created in the Calendar View are applicable in the Schedule View or vice-versa. Filters created in the Schedule View or Calendar View, however, are not applicable to the Resource View or vice-versa.

» Creating or editing filters
» Working with Schedule and Calendar View filters
» Setting filter options
» Creating a column/value filter
» Creating a date/time filter
» Working with Resource View filters
» Deleting a filter
» Duplicating a filter
» Applying a filter

» Showing and hiding rows
» Restoring hidden rows

Sorting allows you to define sort criteria and then arrange task or resource rows in order by values in different columns. Because the Calendar View does not have rows and columns, sorts are not available. Sorts created in the Schedule View are not applicable to the Resource View or vice-versa.

» Defining sort criteria
» Deleting a sort
» Duplicating a sort
» Applying a sort
» Restoring sorted rows

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20.2 Creating or editing Filters

Creating or Editing Filters

Filters can be created and edited in the Define Filter dialog.

To create or edit a filter:
1. On the Project tab, in the Sort & Filter group, click Filters, and choose Define from the drop-down list.
 The Filters dialog opens.
2. Click the New button to create a new filter.
 The Define Filter dialog opens.
 -or-
 To edit an existing filter, in the Filters dialog, select the filter from the Filters table and click the Edit button.
 The Define Filter dialog opens.
 The Define Filter dialog has three tabs.
3. Use the options in the Define Filter dialog to create or edit a filter.
4. Click OK to save your changes and close the Define Filter dialog.
5. In the Filters dialog, choose to either show or select the filtered tasks or resources.
 In the Calendar View, task bars can only be shown or hidden by a filter, not selected.
6. Click OK to apply the selected filter and close the Filters dialog.
 -or-
 Click Close if you do not want to apply the filter at that time.
 The filter is saved for future use.

See also:

- Working with filters and sorts

- Working with Schedule and Calendar View filters
- Setting filter options
- Creating a column/value filter
- Creating a date/time filter
- Working with Resource View filters
- Deleting a filter
- Duplicating a filter
- Applying a filter

- Showing and hiding rows
- Restoring hidden rows

20.3 Working with Schedule and Calendar View Filters

Working with Schedule and Calendar View Filters

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When you create a filter, there are three tabs in the Define Filter dialog with which you interact: the Options tab, theColumn/Value Criteria tab, and the Date/Time Criteria tab.

See also:

- Working with filters and sorts

- Creating or editing filters
- Setting filter options
- Creating a column/value filter
- Creating a date/time filter
- Working with Resource View filters
- Deleting a filter
- Duplicating a filter
- Applying a filter

- Showing and hiding rows
- Restoring hidden rows

20.4 Setting Filter options

Setting Filter Options

In the Options tab of the Define Filter dialog you organize every aspect of a Schedule or Calendar Views' filter. In this tab you determine which type of criteria to apply, what constitutes a filter-matching task, and which outline levels and bars will display when the filter is applied.

To use the Options tab of the Define Filter dialog:

Apply:

This option:		Means:
Column/Value Criteria		In order to be shown or selected by this filter, a task must meet only the criteria defined in the Column/Value Criteria tab.
Date/Time Criteria		In order to be shown or selected by this filter, a task must meet only the criteria defined in the Date/Time Criteria tab.
Column/Value Criteria AND Date/Time Criteria		You are applying the filter criteria you laid out in both the Date/Time and Column/Value Criteria tabs. In order to be shown or selected by this filter

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		a task must meet the criteria defined in each of those tabs.
Column/Value Criteria OR Date/Time Criteria		You are applying the filter criteria you laid out in both the Date/Time Criteria and Column/Value Criteria tabs. In order to be shown or selected by this filter a task need only meet the criteria defined in either one of those tabs.
Expand All Prior to Filtering		All sub-tasks will be displayed before the filter is performed. Only visible rows are filtered.
Restore All Prior to Filtering		All rows are restored before the filter is performed. Only visible rows are filtered. Restoring does not necessarily return your View to the same appearance it had before you hid rows. If you have made changes that affect the order of tasks or resources, these changes cannot be restored. Changes that affect the order of rows include: moving, inserting, deleting, cutting, and pasting rows.
Apply All Bars Range After Filtering		After the filter is applied, your timeline range will begin on the earliest task Start Date/Time and end on the Finish Date/Time of the latest scheduled task.

Filter A Row When Options:

This option:		Means:
Filter A Row When		
Any Bar in that Row Matches		In rows with multiple bars, if any of a row's bars meets the filter criteria, that row will be shown or selected.
First Bar in that Row Matches		In rows with multiple bars, only those rows whose first bar meets the filter criteria will be shown or selected.
All Bars in that Row Match		In rows with multiple bars, a row will be shown or selected only if every bar in that row meets the

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		filter criteria.

Matching Rows Display Options:

This option:		Means:
Bars Options:		
All Bars in the Row		In rows with multiple bars, every bar in the row will display if any bar in the task meets the filter criteria.
Matching Bars Only		In rows with multiple bars, only those bars that meet the filter criteria will display.
Rows Options:		
Matching Rows Only		The filter will show or select only those tasks that meet the filter criteria, on any visible outline level.
Matching Rows AND Parents		The filter will show or select the tasks that meet the filter criteria and the tasks one or more level up in the same outline.
… AND Children		The filter will show or select the tasks that meet the filter criteria and any sub-tasks one or more outline level below.
… AND Parents and Children		The filter will show or select the tasks that meet the filter criteria; the tasks one or more level up in the same outline; and any sub-tasks one or more outline level below.
…AND Families		The filter will show or select every task on every level of the outline for those tasks that meet the filter criteria.

See also:

- Working with filters and sorts
- Creating or editing filters
- Working with Schedule and Calendar View filters
- Creating a column/value filter

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» Creating a date/time filter
» Working with Resource View filters
» Deleting a filter
» Duplicating a filter
» Applying a filter

» Showing and hiding rows
» Restoring hidden rows

20.5 Creating a column/value Filter

Creating a Column/Value Filter

You set the criteria for a Column/Value filter in the Column/Value Criteria tab of the Define Filter dialog. Criteria you set in this tab can then be used as part or all of the filter that you define in the Options tab.

To use the Column/Value Criteria tab of the Define Filter dialog:
1. In the Schedule or Calendar View, on the Project tab, in the Sort & Filter group, click Filters, and choose Define from the drop-down list.
The Filters dialog opens.
2. Click the New button to create a new filter.
3. In the Filter Name box, enter a name for your filter.
4. Click the Column/Value Criteria tab.
5. From the Column drop-down list, click to select a column in which to search for the Value, for instance Activity Name.
6. Click the Test cell in the table.
7. From the Test drop-down list, select the appropriate comparer for the column value, for instance <> (not equal to).
8. Click the Value cell in the table.
9. Enter a value to look for in the specified column, for instance Laura Spears.
-or-
From the Insert Function/Column into Value drop-down list, select a column or function.
A function is a value that represents a variable.

Notes:
- If you have defined a value list for a column, that value list will appear in the Value cell when the column is selected in the Column cell. This helps avoid typing errors and ensures accuracy. Value lists are built in the Value List tab of the Format Column dialog. Create a drop-down list or pop-up value list and use the Build From Data button to enter all the unique column data into the value list.
- You can define multiple criteria in a single filter by entering additional lines in the table. Multiple lines must be separated with "And" or "Or" in the And/Or column on the right of the table. "And" narrows the search as the task must meet both criteria. "Or" expands the search as the task can meet either criteria.
- To group multiple criteria together to change their meaning, click the parentheses cells ( ).

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- When filtering for a value made up of a certain set of consecutive letters, instead of matching the entire value, enter the wildcard character which is an asterisk *. For instance, to search a column for the word "train" as any part of a value, enter *train*. Such a search will find the words "retrain" and "training" as well as "train."
- Click the buttons to add a new line to the filter (between two existing rows), clear a line from the filter, or clear all filters from the table.

See also:

» Working with filters and sorts

» Creating or editing filters
» Working with Schedule and Calendar View filters
» Setting filter options
» Creating a date/time filter
» Working with Resource View filters
» Deleting a filter
» Duplicating a filter
» Applying a filter

» Showing and hiding rows
» Restoring hidden rows

20.6 Creating a date/time Filter

Creating a Date/Time Filter

You set the criteria for a Date/Time filter in the Date/Time Criteria tab of the Define Filter dialog. Criteria you set in this tab can then be used as part or all of the filter that you define in the Options tab.

To use the Date/Time Criteria tab of the Define Filter dialog:

This option:		Does this:
Bars (component)		Sets the date/time filter to look only at the Scheduled, Revised, or Actual component of task bars in the schedule.
Starts In		Asks the filter to search bars whose selected component starts in the specified date/time range.
Ends In		Asks the filter to search bars whose selected component ends in the specified date/time range.

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Is Contained In		Asks the filter to search bars whose selected component is contained within the specified date/time range.
Spans		Asks the filter to search bars whose selected component contains, within its dates and times, the specified date/time range.

This option:		Does this:
Date/Time Range		
Current "X"		Allows you to select from a drop-down list a defined date or time to act as the filter's specified date/time range. Select from Current Hour, Day, Week, Month, Quarter, or Year.
Custom Defined Range		From the drop-down list, select Custom Defined Range. This allows you to define, using the numerous options provided, a range of dates and/or times that will act as the filter's specified date/time range. You can set a Start Date/Time and a Finish Date/Time or use a calculation to be the basis of your custom range. Then, you can choose to have the range start or finish a select number of units before or after the custom range. For example, this could allow you to filter for the month of October plus an additional 14 days.

See also:

- Working with filters and sorts

- Creating or editing filters
- Working with Schedule and Calendar View filters
- Setting filter options
- Creating a column/value filter
- Working with Resource View filters
- Deleting a filter
- Duplicating a filter
- Applying a filter

- Showing and hiding rows

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» Restoring hidden rows

20.7 Working with Resource View Filters

Working with Resource View Filters

Though you can create filters in all three Views, the Resource View has different columns and data than the Schedule and Calendar Views and therefore has different filter options. All the filter options for the Resource View are available in a single tab in the Define Filter dialog.

To create a Resource View filter:
1. In the Resource View, on the Project tab, in the Sort & Filter group, click Filters, and choose Define.
The Filters dialog opens.
2. Click the New button to create a new filter.
3. In the Filter Name box, enter a name for your filter.
4. Select a cell in the Column column of the table.
5. From the Column drop-down list, click to select a column in which to search for the Value, for instance Resource Name.
6. Click the Test cell in the table.
7. From the Test drop-down list, select the appropriate test for the column value, for instance < [Less Than].
8. Click the Value cell in the table.
9. Enter a value to look for in the specified column, for instance Sue Jones.
-or-
From the Insert Function/Column into Value drop-down list, select a function.
A function is a value that represents a variable. For instance the current date or the Per Use Cost value of the resource you are searching.

Notes:
- If you have defined a value list for a column, that value list will appear in the Value cell when the column is selected in the Column cell. This helps avoid typing errors and ensures accuracy. Value lists are built in the Value List tab of the Format Column dialog. Create a drop-down list or pop-up value list and use the Build From Data button to enter all the unique column data into the value list.
- You can define multiple criteria in a single filter by entering additional lines in the table. Multiple lines must be separated with "And" or "Or" in the And/Or column on the right of the table. "And" narrows the search as the resource must meet both criteria. "Or" expands the search as the resource can meet either criteria.
- The top-to-bottom order of filters in the Column/Value Criteria tab determines the order filters are performed.
- To group multiple criteria together to change their meaning, click the parentheses cells ( ).
- When filtering for a value made up of a certain set of consecutive letters, instead of matching the entire value, enter the wildcard character which is an asterisk *. For instance, to search a column for the word "train" as any part of a value, enter *train*. Such a search will find the words "retrain" and "training" as well as "train."
- Click the buttons to add a new line to the filter, clear a line from the filter, or clear the entire table by deleting all lines from the table.

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See also:

- Working with filters and sorts

- Creating or editing filters
- Working with Schedule and Calendar View filters
- Setting filter options
- Creating a column/value filter
- Creating a date/time filter
- Deleting a filter
- Duplicating a filter
- Applying a filter

- Showing and hiding rows
- Restoring hidden rows

20.8 Deleting a Filter

Deleting a Filter

Filters can be deleted in the Filters dialog.

To delete a filter:
1. On the Project tab, in the Sort & Filter group, click Filters, and choose Define from the drop-down list.
   The Filters dialog opens.
2. Select the filter you wish to delete.
3. Click the Delete button.
   A confirmation dialog appears asking you to verify that the filter will be deleted.
4. Click OK to delete the filter or Cancel to retain the filter.
   If you delete the filter, it will no longer be available from the Filters Toolbar or Filters submenu.
5. Click OK to close the Filters dialog and apply the filter that is currently selected.
   -or-
   Click Close to close the Filters dialog without applying a filter.

See also:

- Working with filters and sorts

- Creating or editing filters
- Working with Schedule and Calendar View filters
- Setting filter options
- Creating a column/value filter

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- Creating a date/time filter
- Working with Resource View filters
- Duplicating a filter
- Applying a filter

- Showing and hiding rows
- Restoring hidden rows

20.9 Duplicating a Filter

Duplicating a Filter

Filters can be duplicated in the Filters dialog.

To duplicate a filter:
1. On the Project tab, in the Sort & Filter group, click Filters, and choose Define from the drop-down list.
   The Filters dialog opens.
2. Select the filter you wish to duplicate.
3. Click the Duplicate button.
   The Define Filter dialog opens.
4. Edit the new filter.
5. Click OK to save the filter and close the Define Filter dialog.
6. Click OK to close the Filters dialog and apply the filter that is currently selected.
   -or-
   Click Close to close the Filters dialog without applying a filter.

See also:
- Working with filters and sorts

- Creating or editing filters
- Working with Schedule and Calendar View filters
- Setting filter options
- Creating a column/value filter
- Creating a date/time filter
- Working with Resource View filters
- Deleting a filter
- Applying a filter

- Showing and hiding rows
- Restoring hidden rows

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20.10 Applying a Filter

Applying a Filter

When you apply a Filter, FastTrack Schedule searches the displayed tasks for values that match the filter criteria. It then selects or shows only those matching tasks.

To apply a filter:
1. On the Project tab, in the Sort & Filter group, click Filters, and choose from the list of existing filters in the drop-down list.
 -or-
 On the Project tab, in the Sort & Filter group, click Filters, and choose Define from the drop-down list.
 The Filters dialog opens.
2. Select the filter you want to apply from the table of filter names.
3. In the Matching Rows area, select either Show, which displays only those tasks that meet the filter criteria, or Select, which highlights the tasks that meet the filter criteria.
 In the Calendar View, task bars can only be shown or hidden by a filter, not selected.
4. Click OK to apply the selected filter and close the Filters dialog.

Notes:
- The filter only looks at displayed data. The default setting in the Options tab of the Define Filter dialog is to restore and expand all rows prior to filtering. If these options are changed and a row, task bar, resource row, or resource sub-row is not displayed because it is hidden or collapsed, that information is not searched.
- In order to match the filter criteria, the entire value of the searched cell must match the search value. For instance, if the filter was searching the Resource Name column, and the search value was "Johnson," a resource named "Johnson" would match, but "Seth Johnson" would not match. Using the wildcard character (*) in your filter criteria, the search value "*Johnson" would find "Seth Johnson."
- Any changes you make to the order of rows while rows are hidden may not be restored. Changes that affect the order of tasks include: moving rows, inserting rows, deleting rows, cutting rows, and pasting rows.
- The main purpose of selecting rows with a filter is to highlight them. Once rows are highlighted, you may select either Hide Selected or Hide Unselected from the Tools menu or perform other selection-based operations like copying, deleting, and moving.

See also:
- Working with filters and sorts

- Creating or editing filters
- Working with Schedule and Calendar View filters
- Setting filter options
- Creating a column/value filter
- Creating a date/time filter
- Working with Resource View filters

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» Deleting a filter
» Duplicating a filter

» Showing and hiding rows
» Restoring hidden rows

20.11 Showing and hiding rows

Showing and Hiding Rows

You can hide and show rows using commands in the Editing group on the Home tab. This allows you to select individual rows to be hidden.

To show only the selected rows:
1. Select the row or rows.
2. Right-click and choose Hide Unselected from the context menu.
This leaves visible only the rows that are selected, hiding all other rows.

To hide rows:
1. Select the row or rows.
2. On the Home tab, in the Edit group, choose Hide Selected Rows.
-or-
Right-click and choose Hide from the context menu.
This hides all selected rows leaving visible only the rows that are unselected.

Notes:
-Once you have hidden rows, through the menu or with a filter, you can show them all again by restoring the rows. This shows all hidden rows and rearranges them so that they resume their original, Master Sort order. Right-click a visible row and choose Restore All from the context menu. Restoring does not necessarily return your View to the same appearance it had before you hid rows. If you have made changes that affect the order of tasks or resources, these changes cannot be restored. Changes that affect the order of rows include: moving, inserting, deleting, cutting, and pasting rows.
-You can also restore all hidden rows by clicking the red, Restore All button in the bottom-left corner of your window. This button only appears after rows are hidden (or Filters or Sorts are applied).

See also:
» Working with filters and sorts

» Creating or editing filters
» Working with Schedule and Calendar View filters
» Setting filter options
» Creating a column/value filter
» Creating a date/time filter
» Working with Resource View filters

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- Deleting a filter
- Duplicating a filter
- Applying a filter

- Restoring hidden rows

20.12 Restoring hidden rows

Restoring Hidden Rows

Once you have hidden rows, through the menu or with a filter, you can show them again by restoring rows. This shows all hidden rows and rearranges them so that they resume their original, Master Sort order.

To restore hidden rows in Schedule or Resource Views:
1. On the Project tab, in the Sort & Filter group, click Restore All.

Note:
Restoring does not necessarily return your View to the same appearance it had before you hid rows. If you have made changes that affect the order of tasks or resources, these changes cannot be restored. Changes that affect the order of rows include: moving, inserting, deleting, cutting, and pasting rows.

See also:
- Working with filters and sorts

- Creating or editing filters
- Working with Schedule and Calendar View filters
- Setting filter options
- Creating a column/value filter
- Creating a date/time filter
- Working with Resource View filters
- Deleting a filter
- Duplicating a filter
- Applying a filter

- Showing and hiding rows

20.13 Defining Sort criteria

Defining Sort Criteria

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Setting up a Sort defines the columns that are used to arrange rows in the Schedule and Resource Views. You can define multiple-level sorts that arrange rows based on more than one value. Sorts created in the Schedule View are not applicable in the Resource View or vice versa. The Calendar View does not support sorts as it does not display data in rows.

To use the Define Sort dialog:
1. In the Schedule or Resource View, on the Project tab, in the Sort & Filter group, click Sorts, and choose Define from the drop-down list.
The Sorts dialog opens.
2. In the Sorts dialog, click the New button to define a new sort.
-or-
To change an existing sort, select a sort from the Sorts table and click the Edit button.
3. Enter or edit the name of the sort in the Sort Name box.
4. In the Columns table, click the name of the column by which you want to sort.
5. Click Show to send it to the Sort Order table.
Remove columns from the Sort Order table by clicking the Hide or Hide All buttons.
6. To define a multi-level sort, show more than one column in the Sort Order table.
7. To change the order of sorts in a multi-level sort, click on a sort in the Sort Order table and drag the sort up or down and release it in the desired position.
The top-to-bottom order of sorts in the Sort Order table determines the order sorts are performed.
8. To change the order in which values are arranged, click the Ascending or Descending icons (stair steps).
9. In the Schedule View only, select from the options described below.

This option:		Does this:
All Rows to Move Anywhere		Rearranges rows anywhere, regardless of the outline levels.
Only Within Outline Levels		Retains outline levels by only rearranging rows within each outline level.
Lock Outline Levels Through Level		Allows you to specify which outline line levels with be retained in a sort. Select how many outline levels you wish to lock.

10. Click OK to save the sort criteria and close the Define Sort dialog.
11. Click OK to apply the selected sort and close the Sorts dialog.
-or-
Click Close to close the dialog without applying the sort.
The sort is saved for later use.

Important:
For Schedule View sorts, the Only Within Outline Levels move rows option ensures that tasks do not move out of their respective outline levels when sorted. When the All Rows to Move Anywhere option is selected, rows can move out of their outline levels. Changes made to the order of tasks while the schedule is sorted in this manner cannot be restored.

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See also:

- Working with filters and sorts

- Deleting a sort
- Duplicating a sort
- Applying a sort
- Restoring sorted rows

20.14 Deleting a Sort

Deleting a Sort

Sorts can be deleted in the Sorts dialog.

To delete a sort:
1. On the Project tab, in the Sort & Filter group, click Sorts, and choose Define from the drop-down list.
   The Sorts dialog opens.
2. Select the sort you wish to delete.
3. Click the Delete button.
   A confirmation dialog appears asking you to verify that the sort will be deleted.
4. Click OK to delete the sort or Cancel to retain the sort.
   If you delete the sort, it will no longer be available from the Sorts Toolbar or Sorts submenu.
5. Click OK to close the Sorts dialog and apply the sort that is currently selected.
   -or-
   Click Close to close the Sorts dialog without applying a sort.

See also:

- Working with filters and sorts

- Defining sort criteria
- Duplicating a sort
- Applying a sort
- Restoring sorted rows

20.15 Duplicating a Sort

Duplicating a Sort

Sorts can be duplicated in the Sorts dialog.

To duplicate a sort:

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1. On the Project tab, in the Sort & Filter group, click Sorts, and choose Define from the drop-down list.
 The Sorts dialog opens.
2. Select the sort you wish to duplicate.
3. Click the Duplicate button.
 The Define Sort dialog opens.
4. Edit the new sort.
5. Click OK to close the Sorts dialog and apply the sort that is currently selected.
 -or-
 Click Close to close the Sorts dialog without applying a sort.

See also:

- Working with filters and sorts

- Defining sort criteria
- Deleting a sort
- Applying a sort
- Restoring sorted rows

20.16 Applying a Sort

Applying a Sort

Applying a Sort rearranges rows based on the values in their sorted columns. For multiple-level sorts, rows are arranged in order initially by the first column. Then, all rows with the same value in the first sort are arranged in order by the values in their second column.

To apply a sort:
1. On the Project tab, in the Sort & Filter group, click Sorts, and choose from the list of existing sorts in the drop-down list.
 -or-
 On the Project tab, in the Sort & Filter group, click Sorts, and choose Define from the drop-down list.
 The Sorts dialog opens.
2. Select the name of the sort you wish to apply from the Sorts table.
3. If desired, select the Define as Master Sort checkbox to designate the currently selected sort as the Master Sort.
4. Click OK to apply the sort and close the Sorts dialogs.
 -or-
 Click Close to close the dialog without applying the sort.
 The sort is saved for later use.

Important:
Defining a sort as the Master Sort deletes the original order of your rows – the one to which you return when you use Restore All.

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Note:
Any changes you make to the order of rows while they are sorted may not be restored. Changes that affect the order of rows include: moving, inserting, deleting, cutting, and pasting rows.

See also:
- Working with filters and sorts

- Defining sort criteria
- Deleting a sort
- Duplicating a sort
- Restoring sorted rows

20.17 Restoring sorted rows

Restoring Sorted Rows

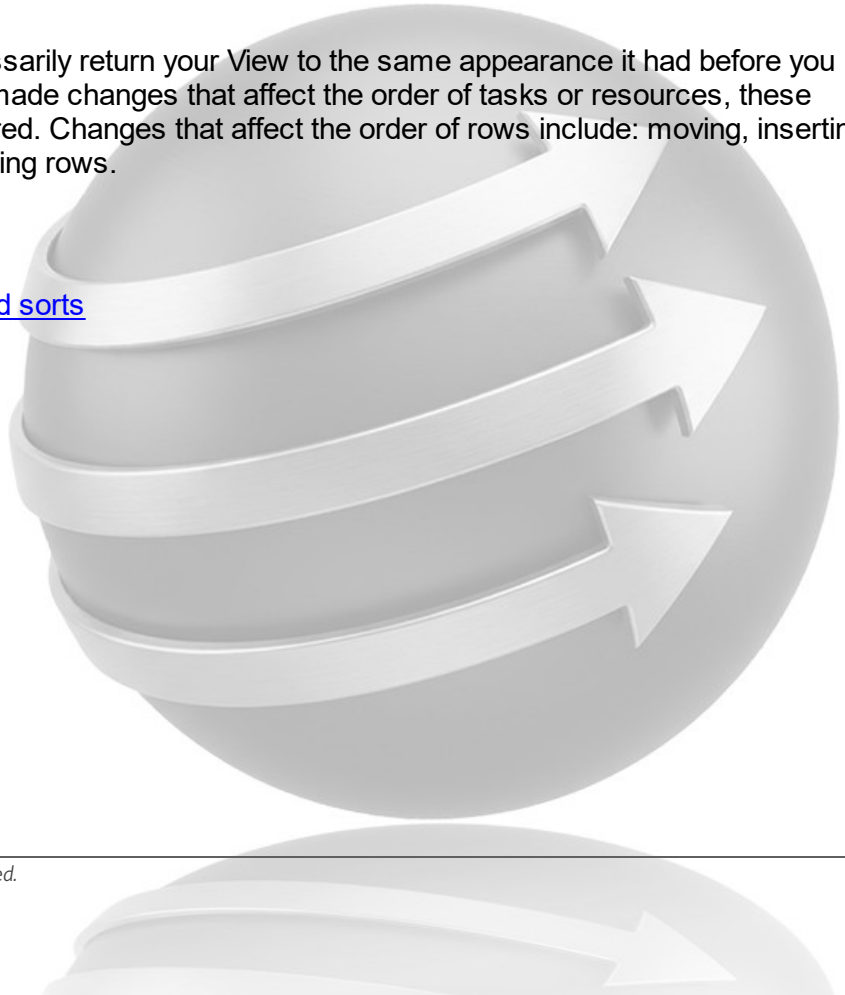
Once you have sorted rows, you can return to the original, Master Sort order again by restoring the rows.

To restore sorted rows in Schedule or Resource Views:
1. On the Project tab, in the Sort & Filter group, click Restore All.

Note:
Restoring does not necessarily return your View to the same appearance it had before you sorted rows. If you have made changes that affect the order of tasks or resources, these changes cannot be restored. Changes that affect the order of rows include: moving, inserting, deleting, cutting, and pasting rows.

See also:
- Working with filters and sorts

- Defining sort criteria
- Deleting a sort
- Duplicating a sort
- Applying a sort



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21 Project Portfolio

21.1 Understanding the Project Portfolio

Understanding the Project Portfolio

You can easily combine your FastTrack Schedule files into a Project Portfolio 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. The Project Portfolio works across platforms so combined files can originate from either a Mac or Windows operating system.

Portfolio Master file - the file you create by combining 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 user of the master file must have read access to a file to insert it.

Important:
Combined subordinate files 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 Portfolio management is the Work Calendar. In a perfect structure, all subordinate files would have the same Work Calendar as the master file. However, it may not always be the case. FastTrack Schedule 2026 will combine files and report work calendar conflicts. Such conflicts may cause scheduling discrepancies between the master file and the subordinate file because the subordinate files will be displayed using the work calendar of the master file.

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 brought into the Portfolio:
- All columns – except calculation columns
- Bars and barstyles
- Pictures, textboxes 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.

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The Project Portfolio is data driven, not visual. Formatting related information will not be brought in. Formatting is 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 combine subordinate files that have different Resource Work Calendars defined for the same resource.

What would you like to do?
- Consolidate files
- Learn about work calendar conflicts
- Work with a master file
- Update a master file

21.2 Combining files into a Portfolio

Combining Files Into a Portfolio

You can create a Portfolio master file by inserting any accessible FastTrack Schedule file into an open FastTrack Schedule file.

To insert one project into another:
1. On the Tools tab, in the Consolidation group, click Define.
   The Define Consolidation dialog opens.
2. Use the options described below to consolidate files.

This option:		Does this:
Add		Allows you to navigate to a file you want to insert into the master file.
Remove		Removes a file from the table. That file will no longer be inserted into the master file or updated. The Removed file will then be removed from the master file though it had been inserted previously.
Locate		Opens a navigation window showing the path of the selected subordinate file. If you have copies of the same file in different locations, Locate allows you to be sure you are consolidating the correct copy.

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"Files are subproject…" option		Every subordinate file in the master file will share the same Project Finish Date and Time, those of the master file.
"Files are project…" option		Every subordinate file in the master file will maintain its own Project Finish Date and Time.
Update		Inserts the most recent saved version of the selected file.
Update All		Selects and updates every file in the dialog and closes the dialog.
Close		Closes the dialog.

Notes:
- It is recommended that all subordinate files have the same Work Calendar as the master file's Work Calendar.
- It is recommended that if one of the subordinate files has a 24 Hour Work Calendar, that the master file's Work Calendar also be set to a 24 Hour Work Calendar.
- Subordinate files whose Work Calendars do not match the master file's Work Calendar can be inserted in the master file. When files have different Work Calendars a log file is created that will analyzes and documents the differences in Work Calendars.
- If you want to combine several files with matching custom Work Calendars, simply modify the Work Calendar of the master file to match. You can simply Copy a Work Calendar and Paste the Work Calendar into all the resources and files by using the Copy Calendar and Paste Calendar buttons in the Work Calendar dialog.

See also:
- Understanding Consolidation
- Consolidation Work Calendar Conflicts
- Working with a master file
- Updating a master file

21.3 Portfolio management and work calendars

Portfolio Management and Work Calendars

Work calendars are a key factor in the Portfolio management of schedules, and should the subordinate file differ from the Master File work calendar, tasks and tasks scheduled in the subordinate file will have different scheduling attributes.

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FastTrack Schedule analyzes and documents the differences in Work Calendars between the master file and the subordinates which you can save in a log file, in text format.

The file is organized in two sections:
The first section shows the master file work calendar, and resources calendars indicating non-work days and hours.

If the master file or subordinate files contain 24 Hour Work Calendars the differences are infinite and therefore the differences are not enumerated.

See also:

- Understanding Consolidation
- Working with a master file
- Updating a master file

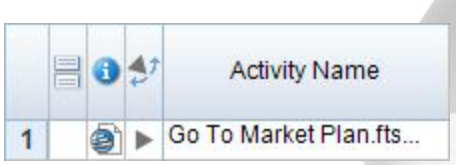
21.4 Working with a Portfolio master file

Working With a Portfolio Master File

A Portfolio master file contains and displays the data from subordinate files that you want to analyze and of which you want to get an overview.

Every subordinate file will have a summary bar. This summary bar can not be moved. You can, however, move and edit the summarized bars to allow for analysis.

In a master file, the Portfolio icon appears in the Information action column for the first row of a subordinate file.



Hover over the Portfolio icon to display the subordinate file's location.

Click on the Portfolio icon to open the Project Information form for that subordinate file.
If you have selected the "Files are projects and have separate Project Finish Dates" option in the Define Portfolio dialog, the subordinate file's Project Information data will stay what it is in the subordinate file. If not, the Project Information data for every subordinate file will match that of the master file.

When you update a subordinate file, that data will overwrite changes you have made in the master file.

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All appearance formatting is dictated by the master files preferences. You can reformat the appearance of data, but those changes will not be applied to the subordinate file and will appear only in the master file. Formatting changes made in the master file will also be overwritten when you update a subordinate file's data.

Currency data is considered simply a number and the designated currency is defined by the master file's Currency Preference settings.

See also:

- Understanding Consolidation
- Consolidation Work Calendar Conflicts
- Updating a master file

21.5 Updating a Portfolio master file

Updating a Portfolio Master File

Once you have created a Portfolio master file you can quickly update every subordinate file it contains, or choose to update only selected files.

To update every subordinate file in a master file:
1. On the Tools tab, in the Portfolio group, click Get Updates.
 -or-
1. On the Tools tab, in the Portfolio group, click Define.
 The Define Portfolio dialog opens.
2. Click Update All to update every subordinate file and close the Define Portfolio dialog.

To update only specific subordinate files in a master file:
1. On the Tools tab, in the Portfolio group, click Define.
 The Define Portfolio dialog opens.
2. Select the subordinate files you want to update.
3. Click Update.
4. Click Close to close the Define Portfolio dialog.

See also:

- Understanding Consolidation
- Consolidation Work Calendar Conflicts
- Working with a master file

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22 Timescales

22.1 Working with timescale rows

Working with Timescale Rows

A timescale contains timescale rows that label the dates and times on the timeline graph. The timescale rows can be formatted to display different divisions of the base timeline units. For instance, a schedule that is divided into base timeline units of weeks might also have timescale rows that group the timescale into months and fiscal quarters.

Timeline units are set in the Format Schedule View dialog or Format Resource View dialog. Timescales and timelines can differ in the Schedule and Resource Views.

Timescale area – Sections of the screen that display the timescale rows. The Schedule and Resource Views can each contain two different timescale areas: one above the timeline and one below it. You can use options in the Define Layout dialog to have the bottom timescale mirror the top timescale.

Base Timescale Row – The timescale row that displays the base timeline units (the smallest units set). You cannot change the units of the base timescale row; they always reflect the base timeline units.

Width – The width of the divisions in the base timescale row define the width of columns in the timeline. Therefore, if the Schedule View timeline is in base units of weeks, changing the width of a column in the row that displays weeks changes the width of the timeline graph.

What would you like to do?

- Formatting timescale rows
- Showing, hiding, and mirroring timescale areas
- Inserting new timescale rows
- Formatting timescale row units
- Formatting timescale row gridlines
- Changing the font attributes of timescale rows
- Moving timescale rows
- Changing the height of timescale rows
- Changing the width of the timescale & timeline-columns

22.2 Formatting timescale rows

Formatting Timescale Rows

The Format Timescale Row dialog allows you to choose the units, display, and gridlines for the selected timescale row.

To open the Format Timescale Row dialog:
1. Double-click the timescale row you want to format.

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-or-
1. Select the timescale row you wish to format.
2. On the Format tab, in the Display group, click Format Selected.
The Format Timescale Row dialog opens.

Note:
You can format multiple timescale rows at once by selecting them and then opening the Format Timescale Row dialog.

See also:
- Choosing new units
- Formatting timescale row gridlines

22.3 Showing, hiding, and mirroring timescale areas

Showing, Hiding, and Mirroring Timescale Areas

Showing the top and/or bottom timescale area labels the timeline, dividing it into units of time – from hours to fiscal years. Mirroring timescale areas produces another version of the top timescale area in the bottom timescale area.

To show or hide timescale areas:
1. On the Project tab, in the Layout group, click Layouts, and choose Define from the drop-down list.
The Layouts dialog opens with the current Layout selected.
2. Click Edit.
The Define Layout dialog opens.
3. In the Columns tab, select or clear the following check boxes.

Selecting this:		Does this:
Column Headings and Timescale (Top)		Displays the column headings and top timescale in the Schedule or Resource Views.
Column Summaries and Timescale (Bottom)		Displays column summaries, if any are defined, and a bottom timescale in the Schedule or Resource Views.
Mirror Timescale from Top		Causes the bottom timescale to appear as a mirror reflection of the top timescale. Column Summaries & Timescale (Top) must be selected if you want to mirror the top timescale.

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4. Click OK to save your layout changes and close the Define Layout dialog.
5. Click OK to apply the selected layout and close the Layouts dialog.

See also:

- Inserting timescale rows into timescale areas
- Moving timescale rows in timescale areas
- Using Layouts

22.4 Inserting new timescale rows

Inserting New Timescale Rows

Inserting new timescale rows into a top or bottom timescale area adds another row that you can use to label the timeline.

To insert a new timescale row:
1. To select it, click the timescale row below which you want the new row to appear.
2. Right-click and choose Insert Timescale Row from the shortcut menu.
-or-
1. Select the timescale row below which you want the new row to appear.
2. On the Insert tab, in the Timeline Elements group, click Timescale.

Notes:
- These steps add a row to a timescale area. To show or hide the top or bottom timescale area, use the Define Layout dialog.
- The new timescale row automatically generates in the base timeline units. To format the timescale row to show different units, open the Format Timescale Row dialog.

See also:

Showing & hiding timescale areas

- Formatting timescale rows

22.5 Formatting timescale row units

Formatting Timescale Row Units

Formatting a timescale row's units allows you to select the units (e.g., Days) in which the timescale row displays. It also allows you to determine how the units will look when displayed in the Schedule or Resource Views.

To change the units of the timescale row:
1. Double-click the timescale row.
-or-
1. Select the timescale row you wish to format.

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2. On the Format menu, in the Timeline Elements group, click Timescale.
The Format Timescale Row dialog opens.
3. In the Display tab, from the Units drop-down list, select a new unit to display in the timescale.
4. Use the options to determine how the selected unit will display.
5. Click OK to apply your changes and close the Format Timescale Row dialog.

Notes:
- Units that are smaller than the base timeline units are not available in the Units drop-down list.
- You cannot change the units of the base timescale row; they always reflect the base timeline units.
- Depending on which unit is selected, different display options are available for Regular, Generic, and Fiscal labels.

See also:
» Formatting timescale row gridlines

22.6 Formatting timescale row gridlines

Formatting Timescale Row Gridlines

Formatting the gridlines for timescale rows allows you to define their thickness, pattern, color, and display in the timescale area and timeline graph.

To define the gridlines for a timescale row:
1. Double-click the timescale row.
-or-
1. Select the timescale row you wish to format.
2. On the Format menu, in the Timeline Elements group, click Timescale.
The Format Timescale Row dialog opens.
3. Click the Gridlines tab.
4. Select or clear the "Show in current Timescale Rows" or "Show in other Timescale Rows and Timeline Graph" check boxes to define where gridlines are drawn.
5. If you wish to design your own gridlines, select the Use Custom Gridlines check box and select the custom gridline color, pattern, and size.
6. Click OK to apply your changes and close the Format Timescale Row dialog.

Note:
When Use Custom Gridlines is not selected, gridlines are drawn according to the options defined in the Gridlines tab of the Format Schedule View or Format Resource View dialogs.

See also:
» Formatting timescale row units

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22.7 Changing the font attributes of timescale rows

Changing the Font Attributes of Timescale Rows

Changing the font, size, style, and color of timescale rows allows you to customize their appearance.

To change the font attributes of timescale rows:
1. Click the desired timescale row or rows to select them.
2. On the Home tab, in the Font group, use the available controls to format the font attributes.
   -or-
   Right-click and choose Font from the shortcut menu.

Note:
If you make a change that increases the size of the text in the timescale row, the labels may be partially hidden because they no longer fit in the space available. Select a smaller font or resize the timescale and timescale-columns.

See also:
- Changing the font attributes of column headings
- Changing the font attributes of cells

22.8 Moving timescale rows

Moving Timescale Rows

Moving timescale rows within a timescale area allows you to arrange the top-to-bottom order within a timescale area.

To move a timescale row:
1. Click the desired timescale row to select it.
   Once you have selected a timescale row, the cursor changes to the Move cursor.
2. Click and drag the timescale row up or down.

Note:
You cannot move timescale rows from the top timescale area to the bottom timescale area or vice versa.

See also:
- Inserting new timescale rows

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22.9 Changing the height of timescale rows

Changing the Height of Timescale Rows

Resizing timescale rows vertically changes the height of the timescale row.

To change the height of a timescale row:
1. Position the cursor over the bottom gridline (or top gridline if in the bottom timescale area) of the timescale row you are resizing.
2. Click and drag up or down to change the height of the row.

See also:
Changing the width of timescale & timeline columns

22.10 Changing the width of timescale & timeline-columns

Changing the Width of Timescale & Timeline Columns

Resizing a timescale column horizontally changes the width of all timescale columns and therefore the timeline columns. When you resize one column, they will all change.

To change the width of the timescale & timeline-columns:
1. Position the cursor over a vertical gridline in the base timescale row.
2. Click and drag to the left to make the timescale and timeline narrower, or to the right to make them wider.

Notes:
- The base timescale row, which displays the base timeline units, is the one that defines column width in the timeline. For instance, if the timeline is in the base units of weeks, the timescale row that displays weeks is the one to be resized.
- If the width of a timescale row is not wide enough to display the entire label, the label is partially hidden.
- You will not be able to resize the base timescale row if Fit to Pages (Width) is selected in the Page Options dialog.

See also:
» Changing the height of timescale rows
» Changing the width of columns

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23 Summary Graphs

23.1 Showing and hiding Summary Graph rows

Showing and Hiding Summary Graph Rows

Showing summary graphs adds an area below the timeline graph that displays the total, average, standard deviation, minimum, maximum, and/or count of the values currently displayed in columns for a particular period of time. For instance, you could show a summary graph row that displays the total cost of all tasks per week.

To show and hide summary graphs:
1. In the Schedule view, on the Project tab, in the Layout group, click Layouts, and choose Define from the choice list.
   The Layouts dialog opens with the current layout selected.
2. Select the name of the layout you wish to change.
3. Click the Edit button.
4. In the Define Layout dialog, click the Summary Graphs tab.
   Any summary graphs you have created appear in the Available Rows table.
5. From the Available Rows or Shown Rows table, select the summary graph you wish to hide or show.
6. Click the Hide or Show button to select if the summary graph should be displayed.
7. Click OK to save the layout and close the Define Layout dialog.
8. Click OK to apply your changes and close the Layouts dialog.

Note:
When you show a summary graph row, it defaults to displaying the total Scheduled Duration per week. You can change the information in summary graph rows by formatting them.

See also:
- Inserting new summary graph rows
- Formatting summary graph rows

23.2 Inserting new Summary Graph rows

Inserting New Summary Graph Rows

Inserting a new summary graph row adds another row to the summary graph below the timeline graph. You can define multiple rows, each displaying a different summary or unit of time.

To insert a new summary graph row:
1. If your schedule does not already contain summary graphs, on the Insert tab, in the Timeline Elements tab, select Summary Graph.
   A summary graph is created and the Format Summary Graphs dialog opens.
   -or-

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1. Select an existing summary graph row.
2. Right-click and select Insert.
The new summary graph will appear below the existing graph you selected. You may then move it if you wish.

To duplicate a summary graph row:
1. Select the summary graph row you wish to duplicate.
2. Right-click and select Duplicate.

Notes:
-Holding the Alt key and positioning the cursor in the summary graphs area gives you the Insert cursor. When you see the Insert cursor, click. A new summary graph will appear and the Format Summary Graphs dialog will open. The inserted summary graph row will default to displaying a total of the Scheduled Duration per week. You can change the information in summary graph rows by formatting them.
- You can also create a new summary graph row by clicking the Create New Summary Graph Row button in the Summary Graph tab of the Define Layout dialog.

See also:
» Formatting summary graph rows
Showing & hiding summary graph rows
» Moving summary graph rows

23.3 Deleting Summary Graph rows

Deleting Summary Graph Rows

Summary graphs are deleted by choosing Delete from their context menus.

To delete a summary graph row:
1. Select the summary graph row you wish to delete.
2. Right-click and select Delete.

See also:
Showing & hiding summary graph rows
» Inserting new summary graph rows

23.4 Formatting Summary Graph rows

Formatting Summary Graph Rows

Opening the Format Summary Graphs dialog allows you to select the units, the data summarized, the type of summary operation, and the display of information for the selected summary graph row.

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To open the Format Summary Graphs dialog:
1. Click the summary graph row you want to format to select it.
2. On the Format tab, in the Display group , click Format Selected.
 -or-
 Double-click the summary graph row within the timeline graph .

See also:
- Inserting new summary graph rows
- Choosing units for summary graph rows
- Choosing data to summarize
- Choosing a summary operation
- Formatting the display of summary graph rows

23.5 Choosing units for Summary Graph rows

Choosing Units for Summary Graph Rows

Choosing units for a summary graph row allows you to determine the unit of time (days, weeks, months, etc.) upon which the summary graph row bases its summaries.

To change the units of the summary graph row:
1. Double-click within the timeline graph of the summary graph row you want to format.
 The Format Summary Graphs dialog opens.
2. Use the Summary Units drop-down list to select a unit of time.
3. Click OK to apply your changes and close the Format Summary Graphs dialog.

Note:
If you choose a fiscal option as a unit, you will need to select when that fiscal period begins from the Starts On drop-down list.

See also:
- Formatting summary graph rows
- Choosing data to summarize
- Choosing a summary operation
- Formatting the display of summary graph rows

23.6 Choosing data to summarize in Summary Graphs

Choosing Data to Summarize in Summary Graph Rows

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Choosing the data to summarize in a summary graph defines what information is summarized per unit of time. For example, you could choose to summarize the Duration column, the Start Date column, or both columns.

To select data to summarize in the summary graph row:
1. Double-click within the timeline graph of the summary graph row you want to format.
   The Format Summary Graphs dialog opens.
2. From the Data to Summarize column in the table, select the column to summarize.
3. Select whether or not to summarize All Bar and Milestone Styles.
4. If you choose not to summarize all bar and milestone styles, from the Bar and Milestone Style to Summarize drop-down list, select one particular bar and milestone style in which to summarize data.
5. Choose whether you wish to distribute the custom column data by Schedule, Revised, or Actual Duration.
6. Click OK to close the Format Summary Graphs dialog.

Notes:
- Remember that, as you add data, too many summaries in one row can lead to confusion.
- In the Format Summary Graphs dialog, the Data to Summarize column drop-down list contains two parts. The first 12 selections represent the Scheduled, Revised, and Actual information for a bar. Options below those 12 are columns which you have created that store their information per bar.
- Only columns which store values per bar can be summarized in a summary graph row.

See also:
- Formatting summary graph rows
- Choosing units for summary graph rows
- Choosing a summary operation
- Formatting the display of summary graph rows

23.7 Choosing summary operations for Summary Graphs

Choosing Summary Operations for Summary Graph Rows

Choosing a summary operation for a summary graph row defines which of the following operations the row displays: the total, average, standard deviation, minimum, maximum, or count of task bar values.

A cumulative summary is calculated in the same manner as a non-cumulative summary, however, the result of each column is added to previous columns; thus, the values accumulate from time period to time period.

To select a summary operation for a summary graph row:
1. Double-click within the timeline graph of the summary graph row you want to format.
   The Format Summary Graphs dialog opens.
2. From the Summary Operation drop-down list, select an operation.

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3. If the operation will or can be tallied cumulatively, use the Cumulative checkbox to establish whether values before the start of the timeline will be included in the calculation of cumulative summaries.
4. If the operation will or can be tallied cumulatively, select to include or to ignore values for tasks that occur before the schedule start in your summary.
5. Click OK to close the Format Summary Graphs dialog.

Note:
Some options in the Format Summary Graphs dialog are only available for certain column types.

See also:
- Formatting summary graph rows
- Choosing units for summary graph rows
- Choosing data to summarize
- Formatting the display of summary graph rows

23.8 Formatting the display of Summary Graph rows

Formatting the Display of Summary Graph Rows

Formatting the display of data in a summary graph row defines how the information is displayed. You can show data as numeric text, a histogram, or a line graph.

You can choose to have one set of summarized data display in more than one way within a single summary graph row. You can also choose to have more than one set of summarized data display in the same way or in different ways, within a single summary graph row.

To format the display of data in a summary graph row:
1. Double-click within the timeline graph of the summary graph row you want to format.
   The Format Summary Graphs dialog opens.
2. In the Display As column drop-down list, select how you want the summary graph to display.
   You can display information as numeric text, a line graph, or a histogram.
3. Use the display attribute options that appear below to determine the appearance of the summary graph.
4. Click OK to apply your changes and close the Format Summary Graphs dialog.

Notes:
- Each Display As type has a different set of display attribute controls which appear when they are selected.
- Though you can summarize more than one set of data in a given summary graph row, summarizing too much data in one row can be visually confusing when displayed in the schedule, so consider simply inserting additional summary graphs.

See also:

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- Formatting summary graph rows
- Choosing units for summary graph rows
- Choosing data to summarize
- Choosing a summary operation

23.9 Labeling Summary Graph rows

Labeling Summary Graph Rows

Providing a label for a summary graph row allows you to describe the contents of the row.

To label a summary graph row:
1. Double-click within the timeline graph of the summary graph row you want to format.
   The Format Summary Graphs dialog opens.
2. In the Left Label box, enter the text you would like to appear, as a label, to the left of the timeline graph.
3. In the Right Label box, enter the text you would like to appear, as a label, to the right of the timeline graph.
4. If you wish to display the contents of the left label in the right label, select the Mirror Labels checkbox.
5. Select the Show Labels checkbox in the table to display the labels in the summary graph row.
6. Choose from the Label Options area that appears below.
7. Click OK to save your changes and close the Format Summary Graphs dialog.

Note:
The label area of summary graphs is determined by the left and right locked columns, as set in the Define Layout dialog. You must have a column locked on either side of the timeline to display the labels.

See also:
- Using Layouts

23.10 Changing the font attributes of Summary Graph rows

Changing the Font Attributes of Summary Graph Rows

Changing the font, size, style, and color of summary graph rows allows you to customize their appearance.

To change the font attributes of a summary graph row:
1. Click the action column area next to the desired summary graph row or rows to select them.
2. On the Home tab, in the Font group use the options to format the font attributes.
   -or-

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Right-click and choose Font from the shortcut menu.

Note:
If you make a change that increases the size of the text in the summary graph row, the information may be partially hidden because it no longer fits in the space available. Select a smaller font or resize the timescale columns.

See also:
- Moving summary graph rows
- Changing the height of summary graph rows

23.11 Moving Summary Graph rows

Moving Summary Graph Rows

Moving summary graph rows within the summary graph area allows you to determine the order of rows.

To move a summary graph row:
1. Click to the left of a summary graph's label cell to select that summary graph row.
   Once you have selected a summary graph row, the cursor changes to the Move cursor.
2. Click and drag the selected summary graph up or down.

-or-

1. In the Schedule view, on the Project tab, in the Layout group, click Layouts, and choose Define from the choice list.
   The Layouts dialog opens.
2. Click the Edit button.
   The Define Layout dialog opens.
3. In the Summary Graphs tab, click and drag on the name of summary graphs in the Shown Rows table to arrange the summary graphs.
4. Click OK to apply your changes and close the Define Layout dialog.
5. Click OK to apply the selected layout and close the Layouts dialog.

See also:
Showing & hiding summary graph rows
- Inserting new summary graph rows

23.12 Changing the height of Summary Graph rows

Changing the Height of Summary Graph Rows

Resizing summary graph rows vertically changes the height of rows.

To change the height of a summary graph row:
1. Click to the left of a summary graph's label cell to select that summary graph row.

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2. Position the cursor over the top gridline of the selected summary graph row.
   The Resize Cursor will appear.
3. Click and drag up or down to change the height of the row.

See also:
Changing the width of timescale & timeline-columns

24 Alignment Grids

24.1 Showing and hiding the alignment grid

Showing and Hiding the Alignment Grid

Showing the grid displays the vertical alignment grid as red dotted lines. The vertical alignment grid is only displayed in the Schedule View.

To view the alignment grid:
1. In the Schedule View, on the View tab, in the Show/Hide group, click Alignment Grid.
   This toggles between hiding and showing the grid.

Notes:
The alignment grid does not print.
There is a horizontal alignment grid, but it does not display.

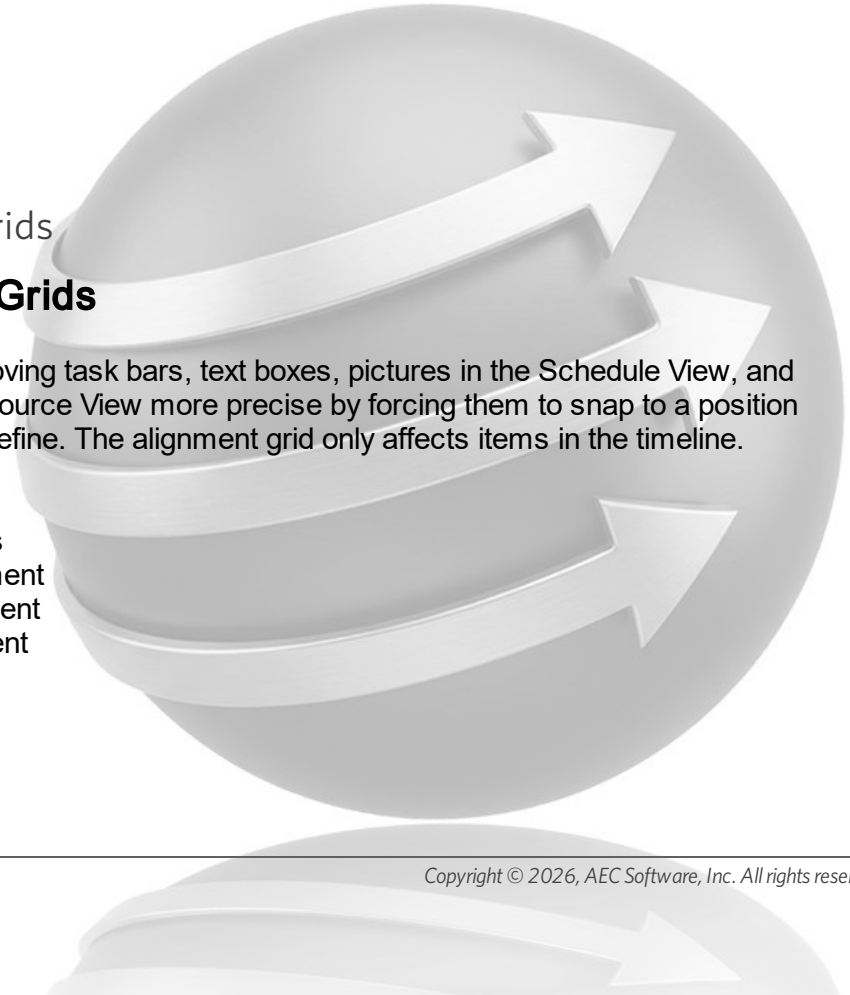
See also:
» Using alignment grids

24.2 Using alignment grids

Using Alignment Grids

Alignment grids make moving task bars, text boxes, pictures in the Schedule View, and assigned bars in the Resource View more precise by forcing them to snap to a position relative to the grids you define. The alignment grid only affects items in the timeline.

What do you want to do?
» Define alignment grids
» Define task bar alignment
» Define text box alignment
» Define picture alignment
» Align items to grids
» Snap items to grids



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24.3 Defining alignment grids

Defining Alignment Grids

You can define the grids to which task bars, text boxes, pictures in the Schedule View, and assigned bars in the Resource View can be aligned. Because it only supports bars, the Resource View only uses a horizontal alignment grid.

To define alignment grids:
1. On the Tools tab, in the Arrange group, click Arrange, and choose Alignment Grid Options from the drop-down list.
   The Alignment Grid Options dialog opens.
2. Select from the options described below.

Select this:		To do this:
Horizontal		
None		Tell the schedule to use no horizontal alignment grid.
Number "X" of Time Unit "X"		Select a unit of time from the drop-down list and then enter the number of those units to space items on the horizontal alignment grid. The smaller the unit between horizontal grid lines, the more you can fine tune a bar or item's horizontal placement within the timeline.
Vertical		
None		Tell the schedule to use no vertical alignment grid.
Center of Row		Set the vertical alignment grid to the middle of each row.
Number "X" of Points		Set the spacing of the vertical alignment grid to a number of pixels. The smaller the number of points between vertical grid lines, the more you can fine tune a bar or item's vertical placement within the timeline.

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Align with Text		Set the vertical alignment grid to align with the text you specify.
Text drop-down list		Determine the text with which the grid will align vertically.

3. Click OK to apply your change and close the Alignment Grid Options dialog.

Notes:
- To show the vertical alignment grid in the Schedule View, on the View tab, in the Show/Hide group, click Alignment Grid.
- The alignment grid does not print.
- Horizontal grids are defined in units of time instead of pixels to help you position task bars in the Schedule View timeline and assigned bars in the Resource View timeline.
- The exact position of the aligned item is determined in Alignment tab of the Format Bar and Milestone Style dialog and the Display tab of the Format Item dialog.
- There are different alignment grid options available depending upon your base Timeline unit. For example, you can set the alignment grid to minute increments if your base Timeline unit is Days or, you can set the alignment grid to daily increments if your base Timeline unit is Weeks.

See also:
- Defining task bar alignment
- Defining text box alignment
- Defining picture alignment
- Aligning items to grids
- Snapping items to grids
- Using alignment grids

24.4 Defining task bar alignment

Defining Task Bar Alignment

Defining the alignment of a bar and milestone style allows you to fine-tune the position of a task bar relative to the alignment grids. You can define the alignment of a bar and milestone style from the Schedule, Resource, and Calendar Views.

To define the alignment of a bar and milestone style:
1. In the Bar and Milestone Styles Toolbar, select the bar and milestone style for which you want to define the aligned position.
2. On the Format tab, in the Display group, click Bar and Milestone Style.
   The Format Bar and Milestone Style dialog opens.
3. Click the Alignment tab.
4. Using the check boxes, select which elements of the bar will snap to the alignment grids.

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5. If you want to change the position of the bar relative to the alignment grid, enter horizontal and vertical offset values.
6. Click OK to apply your changes and close the Format Bar and Milestone Style dialog.

Notes:
- As you make your changes, notice how it affects the bar in the Example window relative to the alignment grids.
- Existing bars will not automatically snap to the revised alignment settings. You must select the existing bars, from the Tools menu select Arrange, and choose Align from the submenu.
- Choosing both Start Point and End Point can change the duration of the task fit between alignment grids.

See also:
- Defining alignment grids
- Aligning items to grids
- Snapping items to grids

24.5 Defining text box alignment

Defining Text Box Alignment

Defining the alignment of text boxes allows you to fine-tune their position relative to the alignment grids. You can define the alignment of text boxes only from the Schedule View.

To define the alignment of a text box:
1. Select a text box.
2. On the Format tab, in the Display group, click Format Selected.
   The Format Item dialog opens.
3. Click the Display tab.
4. Select from the options described below.

This Option:		Does This:
Left		Aligns the left edge of the text box to the grid.
Right		Aligns the right edge of the text box to the grid.
None		Does not align the text box to the grid.
Top		Aligns the top edge of the text box to the grid.
Center		Aligns the center edge of the text box to the grid.

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Top Line		Aligns the center of the first line of text (based on total text height) in the text box to the grid.
Top Line Ascent		Aligns the center of the first line of text (based on the text height without descending letters) in the text box to the grid.
Clipping		
None		Allows the text box to sit atop the row gridlines so that the entire text box displays in the schedule.
Containing Row		Places the text box in a row so that the size of the row determines how much of the text box displays in the schedule. Determines the number of pixels that surround the text box.
Offset		
Horizontal		Positions the text box to the left or right of the alignment grid. Enter a positive number to move the text box to the right or a negative number to move the text box to the left.
Vertical		Positions the text box above or below the alignment grid. Enter a positive number to move the text box up or a negative number to move the text box down.

5. If you want to apply this alignment to all new text boxes, click the Set as Default button.
6. Click OK to apply your changes and close the Format Item dialog.

See also:

- Defining alignment grids
- Aligning items to grids
- Snapping items to grids

24.6 Defining picture alignment

Defining Picture Alignment

Defining the alignment of pictures allows you to fine-tune their position relative to the alignment grids. You can define the alignment of pictures only from the Schedule View.

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To define the alignment of a picture:
1. Select the picture for which you would like to define the alignment.
2. On the Format tab, in the Display group, click Format Selected.
   The Format Item dialog opens.
3. Click the Display tab.
4. Select from the options described below.

This Option:		Does This:
Alignment		
Left		Aligns the left edge of the item to the grid.
Right		Aligns the right edge of the item to the grid.
Top		Aligns the top edge of the item to the grid.
Bottom		Aligns the bottom edge of the item to the grid.
Clipping		
None		Allows the picture to sit atop the row gridlines so that the entire picture displays in the schedule.
Containing Row		Places the picture in a row so that the size of the row determines how much of the picture displays in the schedule. Determines the number of pixels that surround the picture.
Offset		
Horizontal		Positions the picture to the left or right of the alignment grid. Enter a positive number to move the picture to the right or a negative number to move the picture to the left. Is available only when the Top or Bottom Alignment option is selected.
Vertical		Positions the picture above or below the alignment grid. Enter a positive number to move the picture up or a negative number to move the picture down. Is available only when the Top or Bottom Alignment option is selected.

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5. If you want to apply this alignment to all new pictures, click the Set as Default button.
6. Click OK to apply your changes and close the Format Item dialog.

See also:
- Defining alignment grids
- Aligning items to grids
- Snapping items to grids

24.7 Aligning items to grid

Aligning Items to Grids

Aligning items to grids helps you position them precisely by moving the item to the closest alignment grid, according to the alignment options defined for the selected item.

To align items to grids:
1. Select the item or bar.
2. On the Tools tab, in the Arrange group, click Arrange, and choose Alignment Grid from the drop-down list.

Note:
To align to grids as you draw or drag items, from the Tools menu, select Arrange, and choose Snap To Grid from the submenu.

See also:
- Snapping items to grids
- Defining alignment grids
- Defining task bar alignment
- Defining text box alignment
- Defining picture alignment

24.8 Snapping items to grid

Snapping Items to Grids

Snapping items to alignment grids as you drag them automatically positions them to the closest alignment grid, according to the alignment options defined for the item.

To snap items to grids as you drag:
1. On the Tools tab, in the Arrange group, click Arrange, and choose Snap To Grid from the drop-down list.
   As you move items, they will jump to their defined alignment grid.

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See also:

- Aligning items to grids
- Defining alignment grids
- Defining task bar alignment
- Defining text box alignment
- Defining picture alignment

25 Calculations

25.1 Overview of using calculations

Overview of Using Calculations

A calculation column is one whose values are based on a calculation. Its value cannot be entered directly into a column – unlike text and number columns.

For example, if you wanted a column whose value was your profit – assuming a margin 4 cents on the dollar, you could define a calculation column called "Profit" which consisted of a Cost column multiplied by .04. If no Cost data entered for a task, there would be no value in that task's "Profit" cell.

The following calculation could be used to return the value described above:

Cost 1 * .04 = "Profit"

See also:

What is a calculation?

What are the elements of a calculation?

- Defining a calculation column
- Entering a calculation

25.2 What is a calculation?

What is a Calculation?

A calculation is an expression that FastTrack Schedule evaluates to determine values for the calculation column. A calculation can consist of any legal combination of column references, text strings, numbers, functions, and operators. For example, the following calculation could be used to return a value for a calculation column you name "Profit," if you assume a profit margin of 4 cents on the dollar.

Cost 1 * .04 = "Profit"

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In this example, the Cost 1 column is a numeric column. Each time values are assigned to the Cost 1 column, FastTrack Schedule multiplies that value by .04 and displays the result in a calculation column you have named "Profit."

The result of a calculation is referred to as the return value. All of the values required as input to the calculation must be present for FastTrack Schedule to evaluate the calculation. If one of the values required for the calculation does not exist when the calculation is evaluated, FastTrack Schedule does not assign a value to the calculation. The value of the calculation column is empty (null) until the missing value is supplied.

See also:

What are the elements of a calculation?

» Defining a calculation column

25.3 What are the elements of a calculation?

What are the Elements of a Calculation?

A calculation can contain the following elements:

Type of element:		Example:
Column reference		[Finish Date]
Text String		"The final date is"
Number		5.75
» Functions		DateToText(Date)
Combination of elements		"The final date is" + DateToText([Finish Date])

These elements can be combined using Operators to produce an expression. FastTrack Schedule includes over 60 functions capable of complex calculations. For example, nested If Statements have been tested to over 100 nests. FastTrack Schedule's functions operate just like those of other popular spreadsheet applications.

See also:

» Defining a calculation column

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» Entering a calculation

25.4 Defining a calculation column

Defining a Calculation Column

Defining a calculation column allows you to create a column that uses column references, text strings, numbers, functions, and operators to determine its value. For instance, you could create a column named "Profit" that would have a calculation of: "[Cost 1] * .04 =Profit ", where [Cost 1] is another column that stores values per bar.

To define a calculation column:
1. In the Schedule View or Resource View, on the Insert tab, in the Rows and Columns group, click Column.
The Insert Column dialog opens.
2. From the Show pull down list, select Calculation to show every available column of the type "Calculation".
3. In the Column Display Name table, click to select the name of the next available calculation column.
4. Click OK to insert the new column.
The Format Calculation dialog opens.
5. In the Format Calculation dialog, enter a calculation.
6. Click OK to apply your changes and close the Format Calculation dialog and close the Insert Column dialog.
The calculation column now appears in the schedule.

Notes:
- Because their values are generated from other information, you cannot edit calculated values directly in the calculated column.

- To change the name and/or appearance of the column, select it and, on the Format tab, in the Display group, click Format Selected. The Format Column dialog will open.

See also:
» Overview of using calculations
» Entering a calculation

25.5 Entering a calculation

Entering a Calculation

Entering a calculation defines the expression that is being evaluated to return a value for the calculation column.

To enter a calculation in the Format Calculation dialog:
1. Insert a calculation column.

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2. In the Format Calculation dialog, enter the calculation as described below.

To do this:		Do this:
Enter a column reference		In the field at the top of the dialog, click where you want to insert the column reference and then double-click the desired column name in the Columns table.
Enter an operator		In the field at the top of the dialog, click where you want to insert the operator and then double-click the desired symbol in the Operators table.
Enter a function		In the field at the top of the dialog, click where you want to insert the function and then double-click the desired function in the Functions table.
View specific functions		Click the drop-down list above the Functions table and select to sort the functions by name or category, or select to search the table for functions of a specific category.
Enter a literal text string		In the field at the top of the dialog, click where you want to insert the text string, enter quotes, and enter the text between the quotes. Values in quotations are interpreted literally by FastTrack Schedule. The characters enclosed in quotation marks appear in the return value exactly as they appear in the calculation.
Enter a number		In the field at the top of the dialog, click where you want to insert the number and then enter the number.
See a description of an element		Single-click an element from the Columns, Operators, or Functions table and read the description below the Functions table. Click the Function Reference button to open the help system to a detailed description of every function.

3. Click the Check Calculation button to evaluate the calculation and verify it is correct.
4. Click OK to apply your changes and close the Format Calculation dialog.

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Notes:
- Column names must be contained in square brackets [ ] and must be spelled exactly as they appear in the Columns table.
- Only columns that store values per bar or resource can be used in a calculation (this is displayed or determined in the Options tab of the Format Column dialog).
- Functions cannot have a space between the function name and the opening parenthesis and must be spelled exactly as they appear in the Functions table.
- You may enter carriage returns in your calculation between elements.
- A calculation can provide a value only for the column for which it is defined.

See also:
» Overview of using calculations

26 Importing and Exporting

26.1 Importing data

Importing Data

You can use data that has been created in another application in FastTrack Schedule. Import data from the Clipboard or a file into an open schedule.

FastTrack Schedule imports and exports ASCII text – the standard text format. Importing works just as if you were entering the data: appending to the first empty row, the first value is read into the first column. When it encounters a value separator (either a tab or comma), it moves to the next column and enters that value. It continues this way until it sees a row separator (hard return) and then begins entering values in the next row.

FastTrack Schedule can also open Microsoft Project .MPP files and import and export Microsoft Project .XML files.

To import data into the Schedule or Resource Views
1. Store the data you wish to import by saving it as an ASCII text file or by copying it to the Clipboard.
2. Position the columns in your layout so that their order will match the imported data.
3. Select the order of bar and milestone styles in the list of bar and milestone styles in the Bar and Milestone Styles group.
 The first set of dates corresponds to the first bar and milestone style in the list, the second set of dates to the second bar and milestone style, and so on.
4. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, select Import, and choose Data from the submenu.
 The Import Data dialog opens.
5. Select from the options described below.

This Option:		Does This:
Source:		

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File		Allows you to select a file saved on disk to import.
Browse		Opens a dialog where you can navigate to a file whose data you want to import.
Clipboard		Imports data that is stored on the Clipboard.
Options		
Values Separated with		
Tabs		Looks for tabs between values.
Commas		Looks for commas between values.
Locate Multiple Bars on		
Same Alignment Grid		For lines of data that contain multiple sets of dates, corresponding task bars will be drawn on the same alignment grid within the row.
New Alignment Grid		For lines of data that contain multiple sets of dates, corresponding task bars will be drawn on the successive alignment grid within the row (only applicable if there are multiple grids).
Number of Task Levels		Defines the maximum number of outline levels to be imported. For instance, enter 2 if the import data contains tasks with only one level of sub-tasks.
Import First Item		Imports the first line of data as a task or resource. Do not select this if the first line of data is a column heading.
Import Settings		

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Show Import Monitor		If selected, the Import Monitor appears when the import begins; use it to check data as you import it (see table below for details).
Fields Enclosed in Quotes		Removes any quotes that surround imported values.
Optimize Outline Levels		Recognizes the same set of characters as a single outline level. For instance if you had two columns, A and B, and column A had the word Floor in every cell of rows 1-3 and column B had 1, 2, and 3 as the values in its cells, when optimized the data would import as Floor with 3 sub-tasks, 1, 2, and 3 indented below it. When not optimized, each instance of the value Floor would be its own row with one sub-task indented below it.

6. Click OK to save your import options and close the Import Data dialog.

If you selected to display the Import Monitor, it will appear once the import begins. Use the Import Monitor to check data as it is imported, as described below.

Click:		To do this:
		Import the next value.
		Import all remaining values.
		Delete the last value and import the next.
		Cancel the import.

Note:
It is sometimes helpful to view the information to be imported in a word processing application or spreadsheet. This allows you to see the exact order of the values and how they are separated.

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See also:
» Exporting data

26.2 Inserting a picture

Inserting a Picture

Inserting pictures into the Schedule View timeline or Print Preview window allows you to customize your schedule with photos, company logos, clip art, and other images. You can also add image columns to the Schedule View of your schedule.

The following file formats can be imported in FastTrack Schedule:
Windows Bitmap (BMP), Windows Enhanced Metafile (EMF), Windows Metafile (WMF), JPEG (JPG), Portable Network Graphic (PNG), Tagged Image File Format (TIF), Mac QuickDraw Picture (PICT)

To add a picture to the timeline:
1. On the Insert tab, in the Timeline Elements group, click Picture.
   The Insert Picture dialog opens.
2. Select Clipboard if you have previously saved an image to your Clipboard.
   -or-
   Select the File option and click the Browse button to navigate to a file.
3. Click OK to apply your changes and close the Insert Picture dialog.

To add a picture to an image column:
1. Insert an image column into your current layout.
2. Double-click in an image column cell.
   The Open dialog opens.
3. In the Open dialog, navigate to an image file and select it.
4. Click Open to insert the picture into the image field and close the Open dialog.

Note:
If the Clipboard option yields no results, the item on the Clipboard is not in the correct format.

See also:
» Exporting a picture
» Resizing pictures
» Moving pictures
» Formatting pictures

26.3 Exporting data

Exporting Data

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You can export ASCII text to a file on disk or the Clipboard. This allows you to use tasks, resources, and other schedule data created within FastTrack Schedule as data in other applications.

FastTrack Schedule imports and exports ASCII text – the standard text format. Exporting is "what you see is what you get." Only visible data will be exported. You hide, show, and position columns and rows and then use the export options to make the data conform to the expectations of the application to which you are exporting.

To export data from the Schedule or Resource Views:
1. Decide what types information you want to export and then hide, show, and position columns accordingly.
2. Decide which tasks or resources you want to export and then hide, show, collapse, expand, and position rows in the layout accordingly.
3. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, select Export, and choose Data from the sub-menu.
4. Select from the options described below.

This Option:		Does This:
Destination:		
File		Allows you to browse for a file.
Browse		Opens a dialog where you can navigate to the location where your data will be exported.
Clipboard		Exports the data to the Clipboard.
Task Options		(Schedule View only options)
Ignore Outline Levels		Places all Activity Names in the same column and outline level, regardless of whether or not they are indented.
Tab Outline Levels		Moves indented sub-tasks to another column, creating a column for each task level.
Repeat Outline Names		When the checkbox above is selected, this option repeats the higher-level task names in every blank cell that was created by moving the sub-task level to another column.

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Export Sub-tasks Only		Only exports the task names of tasks that are at the lowest level of indentation within the outline level.
Export Multiple Bars per Task as		(Schedule View only options)
One Record – Database (Line-feeds)		Places line feed characters instead of carriage returns after each bar's information. Use this for exporting to relational databases (multiple sets of dates will be exported in the same record).
Spreadsheet (Tabs)		Places tabs instead of carriage returns after each bar's information. Use this for exporting to spreadsheets.
Separate Records		Places carriage returns after each bar's information, forcing each line to contain only one task bar.
Repeat Task Values		Fills in the task values for each set of bars that were left empty when multiple bars were moved to new lines.
Separated Values with		
Tabs		Places tabs between values as separators.
Commas		Places commas between values as separators.
Data Options		
Export as Unicode		For users of Microsoft NT™, this assures that the exported data is saved in Unicode format.
Export Column Names		Exports the column names as the first line in the exported data.
Export Column Summaries		Exports any column summaries you may have defined (Schedule View only).

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Enclose Values in Quotes		Places quotes around values. This helps when exporting data that contains tabs, commas, or carriage returns that might otherwise be interpreted as column and row separators.

5. Click OK to save your export options and close the Export Data dialog.

Note:
It is sometimes helpful to view the exported information in a word processing application or spreadsheet before using it in a database. This allows you to see the exact order of the columns and how they are separated.

See also:
- Exporting data as HTML
- Exporting data as a Microsoft Project XML file
- Exporting data as a picture
- Importing data

26.4 Exporting data as HTML

Exporting Data as HTML

The Exporting as HTML option exports data to a file on disk or the Clipboard where it can then be interpreted by Internet or web browsers. This allows you to view task data as a table on the Internet or an intranet.

To export data from the Schedule or Resource Views:
1. Decide what types information you want to export and then position your layout accordingly.
2. Decide what tasks or resources you want to export and then hide, show, collapse, expand, and position rows accordingly.
3. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, select Export, and choose HTML from the submenu.
The Export Data dialog opens.
4. Select from the choices in the Options tab.
5. Click the HTML tab.
6. Select from the options described below.

This Option:		Does This:
Title		Defines the text that appears as the page title, usually in the window frame and in a History menu.
Header		Defines the text that appears at the top of the page, defined to appear in the style of a level two header.

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Footer		Defines the text that appears at the bottom of the page, defined to appear in the style of a level two header.
Created By		Defines the text that appears at the very bottom of the page. You can enter your name here.
Date		Adds the date the HTML code was generated to the bottom of the page.
E-mail Address		Defines the text that appears at the very bottom of the page and is usually clickable to launch your email application.
Options		
Cell Alignment		Aligns the text in the cells of the table to the left, center, or right of the cell. It is flagged "<td align = "center">".
Border Width		Defines the size (in number of pixels) of the border drawn around the outside of the table. It is generated to the standard line in the HTML table definition as "table border = ".
Cell Spacing		Defines the number of pixels separating the cells. It is generated to the standard line in the HTML table definition as "cellspacing = ".
Cell Padding		Defines the size (in number of pixels) of the border drawn around the each cell. It is generated to the standard line in the HTML table definition as "cellpadding = ".
First Line is Header		Applies the header font style to the first line of export data, usually used if you have included column names in the export. It is flagged "<th>" (table header). When not selected the first line of export data is flagged "<td>" (first row).

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Divider Line Before Table		Draws a line between the text in the Page Header area and the beginning of the table. It is flagged "<hr>" (horizontal rule).
Divider Line After Table		Draws a line between the end of the table and the text in the Page Footer area. It is flagged "<hr>" (horizontal rule).

7. Click OK to apply your changes and close the Export Data dialog.

Note:
This creates a text file that is interpretable as HTML code. It produces a textured table from the export data that can be made accessible to Internet browsers.

See also:
» Exporting data
» Importing data

26.5 Exporting data as a Microsoft Project XML file

Exporting Data as a Microsoft Project XML File

You can export your FastTrack file data into Microsoft Project 2003 or later in the XML format.

To export a FastTrack Schedule file as a Microsoft Project XML file:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, select Export, and choose Microsoft Project XML from the submenu.
The Save As dialog opens.
2. Navigate to the location to which you want the XML file saved, enter or edit the file name, and click Save.
3. Open the newly created XML file in Microsoft Project.

Note:
You can also import Microsoft Project .XML files and open Microsoft Project .MPP files.

See also:
» Exporting data
» Importing data

26.6 Exporting a picture

Exporting Data as a Picture

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You can export a picture of the Schedule, Resource, and Calendar Views and/or their items to the Clipboard or a file on disk. From the Print Preview window, define what is exported: the portion of the View on the page, the View plus graphic items, or the View, its items, and an image of the piece of paper. When performed outside of the Print Preview window, an image of the entire View is exported.

You can export to the following file types:
Windows Bitmap (BMP), Windows Enhanced Metafile (EMF), JPEG/JFIF (JPG), Portable Network Graphic (PNG), Tagged Image File Format (TIF), Mac PICT (PCT)

In Print Preview, to export a page of the file as a picture:
1. In any View, Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, select Print and choose Print Preview from the submenu.
2. Make sure that the page appears as you want and that nothing is selected.
3. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, select Export, and choose Picture from the submenu.
The Export as Picture dialog opens.
4. Select from the options described below.

This Option:		Does This:
Destination		
File		Saves the exported picture to a file on disk.
Browse		Opens a dialog where you can select a destination and file name for the export.
Clipboard		Saves the exported picture to the Clipboard.
Options		
Export Document Only		Copies the area of the file that appears on the current page.
Export Document and Paper		Copies the area of the file which appears on the current page, all text boxes and stamps in the Print Preview window on this page, and an image of the paper on which it is positioned. This also includes headers, footers, and pictures.
Export Document and Page Items		Copies the area of the file which appears on the current page plus all text boxes and stamps in the

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		Print Preview window on this page. This also includes headers, footers, and pictures.

5. Click OK to create the export and close the Export as Picture dialog.

In the Schedule, Resource, or Calendar Views (not in Print Preview), to export the entire View as a picture:
1. Make sure nothing is selected.
Click once in the timeline area or outside of the calendar to assure this.
2. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, select Export, and choose Picture from the submenu.

Notes:
- The file type is entered after the file name or determined in the Save As dialog when browsing for the file.
- If you choose to export a JPEG file you will have the option of choosing the quality of the picture. The quality is ranked from 99-1 with 99 being the highest quality.

See also:
- Exporting the page as a picture
- Exporting data
- Importing data

27 Text Boxes, Pictures, & Legends

27.1 Working with text boxes, pictures, and legends

Working with Text Boxes, Pictures, and Legends

What is a text box?
A text box is like a post-it note you can attach to your schedule. You can enter text in the box and then reposition it in the timeline. Text boxes can be of any font or style and you can define their backgrounds, outline, and shadow. Text boxes are graphic items, like task bars and pictures, which can be aligned to the alignment grid and positioned in relation to other items.

Adding text boxes to the Schedule View timeline helps to describe and label items in the schedule. You can also add them to the Print Preview window of the Schedule and Resource Views as titles and other descriptions that you want to see only on the printed page. The Print Preview window is separate from the View it previews and items in this window do not appear in the Schedule View or Resource View unless printed.

Since working with text boxes in the Schedule View timeline and Print Preview window are the same in many respects, we will address them together, but will point out differences as they occur.

What is a picture?

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A picture is a graphic item that you can add to the Schedule View. You can select and position pictures in the timeline just as you ca task bars and text boxes. Using features such as the definable alignment grid and back-to-front ordering, you can place them precisely where you want them to appear.

A picture can be any graphic. For instance, a company logo created in a drawing application is a picture. You can add a picture either to the Schedule View timeline or the Print Preview window of the Schedule and Resource Views. The Print Preview window is separate from the View it previews and items in this window do not appear in the Schedule or Resource Views unless printed.

What is a legend?
A legend is an item that explains, graphically, what the bar and milestone styles in a schedule represent. If each bar and milestone style in your schedule has a different meaning, a legend allows you to display this in your schedule. Legends can only be added to the Schedule View and the Print Preview window of the Schedule and Resource Views.

Bar and milestone styles are often used as a way of adding information to bars that cannot be expressed by dates. Typically, bar and milestone styles are used to differentiate one group of task bars from another. For example, all the tasks assigned to the sales department may have blue tasks bars while another department's task bars are red. Color-coding is one of the most common uses of bar and milestone styles; however, other elements of a bar and milestone style that you can customize include endpoints, fill patterns, and outline patterns.

The elements of a legend are the:
- title
- bar and milestone styles
- labels for bar and milestone styles
- border lines, shadowing, and attributes

A bar and milestone style can be applied to one or several tasks. You can apply a different bar and milestone style to each task if it suits your purposes. Legends can show all of the bars styles used in a schedule or just the ones you want to include. For example, you may want to include only the bar and milestone styles for key tasks. You can also define multiple legends.

Each line in a legend represents a single component of a Scheduled, Revised, or Actual bar and milestone style. Thus, to show all three components of the bar and milestone style would require three lines in the legend.

You can show all three components of a bar and milestone style or just the components you want to include. For example, if your schedule does not use Revised or Actual components, there is no need to display the bar and milestone style for those components in the legend.

If you redefine a bar and milestone style that is displayed in the legend, the legend is automatically updated to reflect the changes. If you delete a bar and milestone style from the Bars Styles Toolbar, any bars in the schedule using that bar and milestone style change to use the default bar and milestone style. If the deleted bar and milestone style is displayed in the legend, it is automatically changed to the default bar and milestone style.

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In FastTrack Schedule, legends are considered to be graphic items. Other types of graphic items are task bars, pictures, text boxes, and stamps. Legends can be added to your schedule – in either the Schedule View or the Print Preview window – and then moved, resized, formatted to have a border, and so forth. Using such features as the definable alignment grid and back-to-front ordering, you can position legends precisely where you want them to appear.

See also:

- Using Print Preview
- Adding text boxes
- Adding pictures
- Inserting a legend

27.2 Bringing items to front

Bringing Items to Front

Bringing items to the front changes the placement of the item in a row's back-to-front order.

The items in each row are drawn from back to front. This has two consequences:
- Bars, text boxes, and pictures may obscure each other, as in a drawing application.
- Most importantly, the back-to-front order of a row's task bars determines the order of their dates in the date, time, and duration columns.
- An item's back-to-front order is based on the first row containing the item's top edge.

The first set of dates in the column corresponds to the bar that is at the back of the back-to-front order. Therefore, selecting a bar and bringing it to the front makes its dates appear last in the column.

To bring an item to the front of the row's order:
1. Select the item.
2. On the Tools tab, in the Arrange group, click the Bring to Front button.

See also:

- Sending items to back

27.3 Sending items to back

Sending Items to Back

Sending an item to the back changes the placement of the item in a row's back-to-front order.

The items in each row are drawn from back to front. This has two consequences:

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- Bars, text boxes, and pictures may obscure each other, as in a drawing application.
- Most importantly, the back-to-front order of a row's task bars determines the order of their dates in date, time, and duration columns.
- An item’s back-to-front order is based on the first row containing the item’s top edge.

The first set of dates in the column corresponds to the bar that is at the back of the back-to-front order. Therefore, selecting a bar and choosing Send to Back makes that bar’s dates appear first in the column.

To send an item to the back of the row's order:
1. Select the item.
2. On the Tools tab, in the Arrange group, click the Send to Back button.

See also:
» Bringing items to front

27.4 Formatting items

Formatting Items

Formatting text boxes, pictures, legends, and OLE objects allows you to add borders, backgrounds, and shadows.

To format an item:
1. Click the item or items to select them.
2. On the Format tab, in the Display group, click Format Selected.
   The Format Item dialog opens.
3. Select from the options described below.

This option:		Does this:
Display tab		
Alignment		Sets the item’s alignment.
Clipping: None		Allows the item to sit atop the row gridlines so that the entire item displays in the schedule.
Clipping: Containing Row		Places the item in a row so that the size of the row determines how much of the item displays in the schedule. Determines the number of pixels that surround the item.
Offsets		Enter the amount of space (in pixels) between the item and horizontal/vertical alignment grids. Not

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		available when the Alignment option "None" is selected.
Show On		(available in Print Preview window only)
Show On: All Pages		Places the object on every page of the printed FastTrack Schedule document.
Show On: This Page		Places the object only on the page of the printed FastTrack Schedule document that is currently displayed in the Print Preview window.
Show On: Page Range X – X		Places the object only on specified pages of the printed FastTrack Schedule document. Use the From and To boxes to enter the page numbers.
Border tab		
Background		Sets the item's background color and margin. If you wish to see beneath the item, select the Transparent checkbox.
Line		Sets the color and size for the item's border line.
Shadow		Sets the color and size for the item's shadow.
Corner Radius		Determine how sharp or rounded the corners of the item's border will be.
Set as Default		Makes the options you select in the Border tab become the default for all items created in the future.
Font tab		Sets font options for text boxes and legends.

4. Click OK to save your changes and close the Format Item dialog.

See also:

- Adding text boxes
- Adding pictures

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27.5 Text Boxes

27.5.1 Adding text boxes

Adding text boxes

Adding text boxes to the timeline allows you to enter notes, reminders, and labels that customize the appearance of your schedule.

To add a text box:
1. On the Home tab, in the Tools group, click the Text Box tool.
2. Click in the timeline and drag out the width of text box that you want.
3. Enter the content for the text box.

Notes:
- As you enter text, the text box adds more lines in order to fit the contents to the width you have defined.
- To add labels to individual bar elements, use the Schedule or Resource View Labels tab of the Format Bar and Milestone Style dialog.
- You can also add text boxes while in the Schedule or Resource Views' Print Preview window. Text boxes created in the Print Preview window appear only in Print Preview and the printed schedule.

See also:
- Editing text boxes
- Resizing text boxes
- Moving text boxes
- Formatting text boxes
- Changing the font attributes of text boxes
- Using Print Preview

27.5.2 Editing text boxes

Editing text boxes

Editing a text box allows you to enter new text that replaces or adds to the old content.

To edit a text box:
1. With the Arrow tool selected, double-click an existing text box.
2. Enter or edit text in the text box.

See also:
- Adding text boxes

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27.5.3 Resizing text boxes

Resizing text boxes

Resizing text boxes changes the width of the text box, causing it to add or remove lines in order to fit content to the new width.

To resize a text box:
1. Click the text box to select it.
2. Click on one of the resize handles and drag the text box's outline to the desired width.

Note:
The number of lines needed to fit its contents to the current width automatically determines the height of a text box. You can only resize the height of text boxes by changing the number of lines required to fit the text or by increasing the size of the background in the Border tab of the Format Item dialog.

See also:
» Adding text boxes

27.5.4 Moving text boxes

Moving text boxes

You can change the position of text boxes in the schedule.

To move a text box:
1. Click the text box and drag it to a new position in the schedule.

Notes:
- Holding down the Shift key constrains the text box to moving vertically or horizontally.
- You can position the text precisely by using alignment grids.
- Moving the text box up or down can change the row to which it belongs, that is, the row that contains the top edge of the text box. Operations (such as collapsing) that affect its new row also affect the text box.

See also:
» Adding text boxes

27.5.5 Changing the font attributes of text boxes

Changing the font attributes of text boxes

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Changing the font, size, style, color, and justification of text allows you to customize the appearance of the text boxes in your schedule.

To change the font attributes of a text box:
1. Select the text box.
2. On the Home tab, in the Font group, use the controls to format the font attributes of the text box.
-or-
1. Select the text box.
2. On the Format tab, in the Display group, click the Format Selected button.
The Format Item dialog opens.
3. Click the Font tab.
4. Select the font attributes.
5. Click OK to save your changes and close the Format Item dialog.

Notes:
- The font attributes defined for the text box affect all its contents – you cannot define different font attributes for separate words.
- You can define default font attributes for future text boxes by selecting a text box with the desired font attributes, opening the Format Item dialog, and clicking the Set as Default button.

See also:
» Changing the font attributes of cells

27.5.6 Adding pointers to items

Adding pointers to items

Pointers (also known as leaders) are lines that branch out from items, such as text boxes and pictures, and extend to any point on the timeline graph. Pointers act as a graphic representation of the relationship of an item to some part of the schedule, such as a bar or a point in time. Pointers are only available in the Schedule View.

To add pointers to items:
1. Select the item or items to which you want to add a pointer.
2. On the Insert tab, in the Timeline Elements group, click Pointer.
The Format Pointer dialog opens.
3. Format the pointer.
4. Click OK to save your pointer style and close the Format Pointer dialog.
5. Select the pointer, and use your mouse to drag the pointer around the item and anchor it to a handle point.
6. Use your mouse to extend the pointer out to whatever point you want the item to refer to in the timeline.

Notes:
- Each item can have an unlimited number of pointers added to it.
- When you move the item, the pointer will change size as necessary to stay fixed to the schedule element to which it is pointing.

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See also:

- Formatting pointers
- Adding text boxes
- Adding pictures
- Formatting items

27.5.7 Formatting pointers

Formatting pointers

Formatting pointers allows you to select the path of the pointer, the pointer line's size, color, and pattern; and the arrowhead's shape, size, color, and pattern.

To format pointers:
1. Double-click the pointer you want to format.
   The Format Pointer dialog opens.
2. Select from the options described below.

-or-

1. select the pointer you want to format.
2. On the Format tab, in the Display group, click the Format Selected button.
   The Format Pointer dialog opens.
3. Select from the options described below.

This option:		Does this:
Location		
Location		When you set a pointer to go from an item to a task bar, this option allows you to determine to which part of a bar you want the pointer to be attached.
Line		
Size		Allows you to determine the width of the pointer line.
Color		Allows you to determine the color of the pointer line.
Optimize Hairlines		Optimizes the appearance of pointer lines when printed with a high-resolution printer.
Arrows		

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Shape		Allows you to choose to have an arrowhead on the start, the finish, or both ends of the pointer. You can also choose to display no arrowhead on the pointer.
Color		Allows you to determine the color of the pointer's arrowhead.
Pattern		Allows you to determine the pattern of the pointer's arrowhead.
Arrowhead Size		Allows you to determine the size of the pointer's arrowhead.
Path		
Path buttons		Allows you to decide if the path of the pointer is: a straight line, over and up/down, or up/down and over.

4. Click OK to save your changes and close the Format Pointer dialog.

See also:

- Adding pointers to items
- Adding text boxes
- Adding pictures
- Formatting items

27.6 Pictures

27.6.1 Adding pictures

Adding pictures

Inserting pictures into the Schedule View timeline or Print Preview window allows you to customize your schedule with photos, company logos, clip art, and other images. You can also add image columns to the Schedule View of your schedule.

The following file formats can be imported in FastTrack Schedule:
Windows Bitmap (BMP), Windows Enhanced Metafile (EMF), JPEG/JFIF (JPG), Portable Network Graphic (PNG), Tagged Image File Format (TIFF), Mac PICT (PCT)

To add a picture to the timeline:
1. On the Insert tab, in the Timeline Elements group, click Picture.
   The Insert Picture dialog opens.

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2. Select Clipboard if you have previously saved an image to your Clipboard.
-or-
Select the File option and click the Browse button to navigate to a file.
3. Click OK to apply your changes and close the Insert Picture dialog.

To add a picture to an image column:
1. Insert an image column into your current layout.
2. Double-click in an image column cell.
The Open dialog opens.
3. In the Open dialog, navigate to an image file and select it.
4. Click Open to insert the picture into the image field and close the Open dialog.

Note:
If the Clipboard option yields no results, the item on the Clipboard is not in the correct format.

See also:
- Resizing pictures
- Moving pictures
- Formatting pictures

27.6.2 Formatting items

Formatting Items

Formatting text boxes, pictures, legends, and OLE objects allows you to add borders, backgrounds, and shadows.

To format an item:
1. Click the item or items to select them.
2. On the Format tab, in the Display group, click Format Selected.
The Format Item dialog opens.
3. Select from the options described below.

This option:		Does this:
Display tab		
Alignment		Sets the item's alignment.
Clipping: None		Allows the item to sit atop the row gridlines so that the entire item displays in the schedule.
Clipping: Containing Row		Places the item in a row so that the size of the row determines how much of the item displays in the schedule. Determines the number of pixels that surround the item.

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Offsets		Enter the amount of space (in pixels) between the item and horizontal/vertical alignment grids. Not available when the Alignment option "None" is selected.
Show On		(available in Print Preview window only)
Show On: All Pages		Places the object on every page of the printed FastTrack Schedule document.
Show On: This Page		Places the object only on the page of the printed FastTrack Schedule document that is currently displayed in the Print Preview window.
Show On: Page Range X – X		Places the object only on specified pages of the printed FastTrack Schedule document. Use the From and To boxes to enter the page numbers.
Border tab		
Background		Sets the item’s background color and margin. If you wish to see beneath the item, select the Transparent checkbox.
Line		Sets the color and size for the item’s border line.
Shadow		Sets the color and size for the item’s shadow.
Corner Radius		Determine how sharp or rounded the corners of the item’s border will be.
Set as Default		Makes the options you select in the Border tab become the default for all items created in the future.
Font tab		Sets font options for text boxes and legends.

4. Click OK to save your changes and close the Format Item dialog.

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See also:
- Adding text boxes
- Adding pictures

27.6.3 Resizing pictures

Resizing pictures

Resizing a picture changes its dimensions. You can resize pictures added to the Schedule View timeline and to the Print Preview layer. You cannot resize pictures in an image column within FastTrack Schedule. Those images should be resized outside of the program then added to a cell in the column.

To resize a picture:
1. Click the picture to select it.
2. Click and drag one of the handles until its outline has reached the desired proportions.
   -or-
   Hold down the Shift key and drag one of the corner handles to maintain the same scale.

Note:
Double-clicking the picture returns the picture to its original size.

See also:
- Adding pictures
- Moving pictures
- Formatting pictures

27.6.4 Moving pictures

Moving pictures

Moving a picture allows you to change its position in the timeline. You can move pictures added to the Schedule View timeline and to the Print Preview layer. You cannot move pictures in an image column cell: they will always be centered in the cell.

To move a picture:
1. Click the picture and drag its outline to the desired position.

Notes:
- Holding down the Shift key constrains the picture to moving vertically or horizontally.
- You can also nudge the picture one pixel at a time by selecting it and pressing the left, right, up or down arrows on your keyboard.
- Moving the picture up or down can change the row to which it belongs, that is, the row that contains the picture's top edge. Operations that affect its new row, such as collapsing, also affect the picture.

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See also:
- Adding pictures
- Formatting pictures
- Resizing pictures

27.7 Legends

27.7.1 Inserting legends

Inserting legends

Inserting a legend creates a key to the bar and milestone styles used in the schedule. It lists the chosen bar and milestone style and allows you to assign a name, or a label, to each bar and milestone style. You can create multiple legends in the Schedule View and the Schedule and Resource Print Preview windows.

To insert a legend in the Schedule View:
1. On the Insert tab, in the Timeline Elements group, click Legend.
   The Format Legend dialog opens.
2. Format the legend.
3. Click OK to save the legend and close the Format Legend dialog.

To insert a legend in the Print Preview layer of the Schedule or Resource View:
1. On the Print Preview tab, in the Page Items group, click Insert and choose Insert Legend from the drop-down list.
   The Format Legend dialog opens.
2. Format the legend.
3. Click OK to save the legend and close the Format Legend dialog.

See also:
- Formatting a legend
- Moving legends

27.7.2 Formatting legends

Formatting legends

Formatting a legend defines the title, bar and milestone styles, labels, font attributes, border, background, and options for the selected legend.

To open the Format Legend dialog in the Schedule View:
1. Click the legend to select it.
2. On the Format tab, in the Display group, click Format Selected.
   The Format Legend dialog opens.

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To open the Format Legend dialog in the Print Preview window of the Schedule or Resource View:
1. Click the legend to select it.
2. On the Print Preview tab, in the Page Items group, click Format Selected.
The Format Legend dialog opens.

To format a legend:
1. Click the Display tab of the Format Legend dialog.
2. Enter a name in the Title box and select the Show checkbox if you want it displayed at the top of the legend.
3. Select a cell in the Bar and Milestone Style column of the table and, from the Bar and Milestone Style drop-down list, select a bar and milestone style.
The selected bar and milestone style appears in that cell.
4. Select a cell in the Label column of the table and name the bar and milestone style appropriately.
5. To change the font attributes of the text or title, use the options in the Font tab.
6. To change the border or background, use the options in the Border tab.
7. Click the Options tab.
8. In the Clipping area, select None or Containing Row.
None will display the whole legend and Containing Row will hide the parts of the legend that are outside the row that contains the legends top-left corner.
For Print Preview legends, in the Show On area, select the printed pages on which you wish to display the legend.
9. Click OK to apply your legend changes and close the Format Legend dialog.

Notes:
- To change the order in which rows appear in the legend, click and drag bar and milestone styles up or down in the table.
- To delete a bar and milestone style from the legend, select a bar and milestone style from the table and press the Delete key on your keyboard.

See also:
- Inserting a legend
- Moving a legend
- Resizing a legend

27.7.3 Moving legends

Moving legends

Moving legends allows you to change the position of legends in the Schedule View timeline or Print Preview window.

To move a legend:
1. Click the legend, hold down your left mouse button and drag it to a new position.

Notes:

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- Holding down the Shift key constrains the legend to moving vertically or horizontally.
- Moving the legend up or down in the timeline can change the row to which it belongs, that is, the row that contains the legend's top edge. Operations that affect its new row, such as collapsing, also affect the legend.

See also:
- Inserting a legend
- Resizing legends

27.7.4 Resizing legends

Resizing legends

Use the Arrow tool to resize legends.

To resize a legend:
1. Click the legend to select it.
2. Click on one of the resize handles and drag the outline to the desired width.

Note:
To maintain the proportions of the legend while you resize it, hold down the Shift key and drag one of the corner handles.

See also:
- Inserting a legend
- Moving legends

28 FastSteps

28.1 What are FastSteps?

What are FastSteps?

FastSteps are a scripting ability, built into FastTrack Schedule. FastSteps allow you to automate repetitive scheduling tasks by grouping a series of commands into a single sequence that you can then initiate with one menu choice. FastSteps are available in the Schedule, Resource, and Calendar Views and their Print Preview windows.

Let's say, for instance, that every time you update a particular file, you want a report of the tasks that remain unfinished. Using FastSteps, you can create a sequence that applies a filter for incomplete tasks, prints the filtered schedule, restores those tasks hidden by the filter, saves the file, and then closes that schedule. The graphic below illustrates the FastSteps command sequence detailed above. It is named "Tasks to be Completed".

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Every time you finish editing the schedule, you simply select "Tasks to be Completed" from the list of FastSteps and all of the commands listed above will be completed automatically.

Each member of a project team can have a FastSteps sequence to suit his or her needs. You could also 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.

See also:

- Defining a new FastSteps sequence
- Editing an existing FastSteps sequence
- Running an existing FastSteps sequence

28.2 Defining a new FastSteps sequence

Defining a New FastSteps Sequence

FastSteps allow you to string a collection of commands together into one FastSteps script that can be run with one menu choice.

To create a new FastSteps sequence:
1. On the Tools tab, in the Macro group, click FastSteps and choose Define from the choice list.
   The FastSteps dialog opens.
2. Click the New button.
   The Define FastSteps dialog opens.
3. In the FastStep Name box, enter a name for the FastStep.
4. Select an item in the Commands table.
5. Click the Add button to send the command to the FastStep table.
6. Continue inserting commands into the FastStep table until you have the sequence of commands you desire.
7. Drag commands up and down in the FastStep table to change the order in which the commands occur.
8. Click OK to apply your change and close the Define FastSteps dialog.
9. Click OK to apply the FastStep and close the FastSteps dialog.
   -or-
   Click Close to exit FastSteps without running a FastSteps sequence.
   Your newly created FastStep is saved; you simply select the sequence name from the FastSteps choice list when you are ready to run it.

Notes:
- By selecting the Pause command, you can add a pause to your script. This will pause the FastStep and bring up a dialog displaying a message you define. Then, in the Pause dialog, you can click the Resume button to start the FastSteps script where it left off, or you can click the Stop button to abort the sequence all together.
- FastSteps can be referenced (called) by other FastSteps and used in Visual Basic and AppleScripts.

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See also:
» Editing an existing FastSteps sequence
What are FastSteps?

28.3 Editing an existing FastSteps sequence

Editing an Existing FastSteps Sequence

An existing FastSteps sequence can easily be altered to suit your changing needs.

To edit an existing FastSteps sequence:
1. On the Tools tab, in the Macro group, click FastSteps and choose Define from the choice list.
The FastSteps dialog opens.
2. From the table, select the FastSteps sequence you would like to edit.
3. Click the Edit button.
The Define FastSteps dialog opens.
4. If necessary, click in the FastStep Name box to edit the title of the FastSteps sequence.
5. Click the Add and Remove buttons to alter the commands in the FastStep table.
6. Drag commands up and down in the FastStep table to change the order in which the commands occur.
7. Click OK to apply your changes and close the Define FastSteps dialog.
8. Click OK to apply the FastStep and close the FastSteps dialog.
-or-
Click Close to exit FastSteps without running a FastSteps sequence.
Your changes to the FastStep are saved; you simply select the sequence name from the FastSteps choice list when you are ready to run it.

See also:
» Defining a new FastSteps sequence
What are FastSteps?

28.4 Deleting a FastSteps sequence

Deleting a FastSteps Sequence

FastSteps can be deleted in the FastSteps dialog.

To delete a FastStep:
1. On the Tools tab, in the Macro group, click FastSteps and choose Define from the choice list.
The FastSteps dialog opens.
2. Select the FastStep you wish to delete.
3. Click the Delete button.

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A confirmation dialog appears asking you to verify that the FastStep will be deleted.
4. Click OK to delete the FastStep or Cancel to retain the FastStep.
If you delete the FastStep, it will no longer be available from the FastSteps choice list.
5. Click OK to close the FastSteps dialog and apply the FastStep that is currently selected.
-or-
Click Close to close the FastSteps dialog without applying a FastStep.

See also:
What are FastSteps?

28.5 Duplicating a FastSteps sequence

Duplicating a FastSteps Sequence

An existing FastSteps sequence can be duplicated in the FastSteps dialog.

To duplicate a FastStep:
1. On the Tools tab, in the Macro group, click FastSteps and choose Define from the choice list.
The FastSteps dialog opens.
2. Select the FastStep you wish to duplicate.
3. Click the Duplicate button.
The Define FastSteps dialog opens.
4. Edit the new FastStep.
5. Click OK to save the new FastStep and close the Define FastSteps dialog.
6. Click OK to close the FastSteps dialog and apply the FastStep that is currently selected.
-or-
Click Close to close the FastSteps dialog without applying a FastStep.

See also:
What are FastSteps?

28.6 Running an existing FastSteps sequence

Running an Existing FastSteps Sequence

Once you have created a FastSteps script you can run it at any time you are working on a schedule. Keep in mind, however, that changes to filters, sorts, layouts, and ranges will affect any FastSteps that include them.

To run an existing FastSteps sequence:
1. On the Tools tab, in the Macro group, click FastSteps and select the FastStep you wish to run from the choice list.

Note:

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If a FastSteps script is unable to run, the Define FastSteps dialog opens with the command that does not work highlighted. Most likely, the FastStep contains a Filter, Sort, Layout, or Range that has been deleted or renamed.

See also:
» Editing an existing FastSteps sequence
What are FastSteps?

29 iCalendar Integration

29.1 Working with iCalendar files

Working with iCalendar Files

iCalendar is a data standard for viewing your project data in calendar form.

You can quickly publish your FastTrack Schedule file as an iCalendar (.ICS) file to any hosting location. You can also export the file as an iCalendar (.ics) file, or, if you are using Mac OS X 10.10 or later, into Apple Calendar.

What do you want to do:
» Publish a schedule as an iCalendar file
» Unublish an iCalendar file
» Using the Schedule Publish Log
» Import iCalendar files
» Import iCalendar Options
» Export data as an iCalendar file
» Export iCalendar Options

29.2 Publishing schedules as iCalendar files

Publishing Schedules as iCalendar Files

You can publish your schedule as an iCalendar to a public or private server.

To publish a schedule as an iCalendar to another location:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, then click Publish and choose Publish to iCalendar Server from the submenu.
The Publish iCalendar dialog opens.
2. Click Publish.
The Schedule Published dialog opens.
3. Click Visit Page to open the iCalendar file in a browser.
-or-

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Click Send Mail to open your mail program and create a mail message regarding the newly published iCalendar file.
-or-
Click Close to close the Schedule Published dialog.

See also:
» Working with iCalendar files

29.3 Unpublishing an iCalendar schedule

Unpublishing an iCalendar File

You can remove an iCalendar you have published to a server.

To unpublish a schedule as an iCalendar:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, then click Publish and choose Unpublish to iCalendar Server from the submenu.
The Unpublish iCalendar dialog opens.
2. Select the Publish Name of the iCalendar file in the table.
3. Click the Unpublish Selected button.
Clicking the Unpublish All button will select and unpublish every iCalendar in the table.
4. Click Close to close the Unpublish iCalendar dialog.

See also:
» Working with iCalendar files

29.4 Importing iCalendar files

Importing iCalendar Files

You can import an iCalendar (.ics) file into your open schedule.

To import an iCalendar file:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, then click Import, and choose iCalendar.
The Open dialog opens.
2. Navigate to the iCalendar file you want to import, and select it.
3. Click Open to close the Open dialog and import the iCalendar file.

See also:
» Working with iCalendar files
» Import iCalendar File Options

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29.5 Import iCalendar Options

Import iCalendar Options

You can set the following properties for the iCalendar (.ics) file to read:

- Source
  Click the "Browse" button to open a file selection dialog and choose the file you would like to import.

- Note Pre-Pending
  If you would like to distinguish between notes in FastTrack Schedule vs. notes coming from the calendering software, choose this option to preserve the existing notes in FastTrack Schedule

See also:
» Working with iCalendar files

29.6 Exporting data as an iCalendar

Exporting Data as an iCalendar File

You can export your open schedule as an iCalendar (.ics) file.

To export an iCalendar file:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, then click Export, and choose iCalendar.
   The Export iCalendar dialog opens.
2. Click Export.
   The Save As dialog opens.
3. Choose the name and location to which you want to save the exported .ics file.
4. Click Save to close the Save As dialog and export your open schedule data to an iCalendar file.

See also:
» Working with iCalendar files
» Export iCalendar Options

29.7 Export iCalendar Options

Export iCalendar Options

You can set the following properties for the generated iCalendar (.ics) file:

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- Destination
  Click the "Browse" button to open a file selection dialog and choose the destination file you want.

- Unique Calendar Identifier
  Depending on the calendar software you use, this will set the calendar by its UUID rather than the name.

- Calendar Name
  The display name of the calendar.

- Calendar Description
  The description Property of the calendar.

- Calendar Category
  The category Property of the calendar. If this is not set, the calendar name is used.

See also:
» Working with iCalendar files

29.8 Using the Schedule Publish Log

Using the Schedule Publish Log

Every time you publish a schedule as an iCalendar, the transaction is noted in the Schedule Publish Log. Data in the log is static, but you can clear data and save the log as a text file.

To clear the Schedule Publish Log:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, then click Publish and choose Publish Log from the submenu.
   The Schedule Publish Log opens.
2. Click Clear Log to erase the logged transactions.
3. Click Close to close the Schedule Publish Log.

To save the Schedule Publish Log:
1. Start Backstage with the File tab at the top left of the FastTrack Schedule window to open the Application menu, then click Publish and choose Publish Log from the submenu.
   The Schedule Publish Log opens.
2. Click Save Log to save the logged transactions as a text file.
   The Save As dialog opens.
3. From the Save as type pull-down list, choose the file type in which you would like to save the log data.
4. Navigate to the location to which you would like to save the file.
5. Click Save to save the log data.
6. Click Close to close the Schedule Publish Log.

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See also:

» Working with iCalendar files

30 Reference Information

30.1 Keyboard Shortcuts

Keyboard Shortcuts

This notation:	Means:
Ctrl	The key labeled Control or Ctrl.
Alt	The key labeled Alternate or Alt.
Shift	The key labeled Shift.
Ctrl+B	Hold down the Control key and at the same time press the key labeled B.
Ctrl+Alt+P	Hold down the Control key and at the same time press the Alt key and the key labeled P.

To do/launch this:	Shortcut:
Activity Information	Ctrl + T
Actual Size (Reset Zoom Level)	Ctrl + Shift + 0 (Zero on Numbers Row)
Bold Text	Ctrl + B
Calendar View	Ctrl + 2
Carriage Return	Alt + Enter
Close	Ctrl + W
Copy	Ctrl + C
Current Date	Ctrl + 7

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To do/launch this:	Shortcut:
Current Time	Ctrl + 8
Cut	Ctrl + X
Exit the program	Ctrl + Q
Find/Replace	Ctrl + F
Format Font	Ctrl + Shift + T
Format Selected	Ctrl + Shift + M
Format View	Ctrl + Shift + F
Get Portfolio Updates	Ctrl + E
Go To Bar	Ctrl + D
Go To Row	Ctrl + G
Go To Today	Ctrl + Shift + Y
Help	Ctrl + ? or F1
Indent	Ctrl + J
Italic Text	Ctrl + I
Launch File/URL	Ctrl + L
Link Selected Bars	Ctrl + Shift + L
New	Ctrl + N
New With Getting Started	Ctrl + Shift + N
Nudge Down	Down Arrow
Nudge Left	Left Arrow
Nudge Right	Right Arrow
Nudge Up	Up Arrow
Open ExpressDate Calendar	Ctrl + 9
Open ExpressTime Clock	Ctrl + 0 (zero)

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To do/launch this:	Shortcut:
Open	Ctrl + O
Open Template	Ctrl + Shift + O
Outdent	Ctrl + Shift + J
Page Options	Ctrl + Alt + P
Paste	Ctrl + V
Print	Ctrl + P
Print Preview	Ctrl + 4
Print Setup	Ctrl + Shift + P
Project Information	Ctrl + Shift + D
Redo	Ctrl + Y
Resource Information	Ctrl + R
Resource View	Ctrl + 3
Save	Ctrl + S
Save As	Ctrl + Shift + S
Save As Template	Ctrl + Alt + S
Schedule View	Ctrl + 1
Select All	Ctrl + A
Underline Text	Ctrl + U
Undo	Ctrl + Z
Unlink Selected Bars	Ctrl + Shift + U
Zoom In	Ctrl + + (Plus on Numbers Row)
Zoom Out	Ctrl + - (Dash on Numbers Row)

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30.2 Additional Help Resources

30.2.1 AEC Software support services

AEC Software support services

If you have a question about the operation of the application, first look in the Online Help System resources, outlined in the Online help section. If you cannot find the answer to your question, contact AEC Software Technical Support. Technical Support is typically available Monday through Friday, between 8:00 AM and 5:00 PM Eastern Standard Time, USA.

You can contact AEC Software Technical Support in a variety of ways:
- Phone: (703) 450-2318
- Fax: (703) 450-9786
- Email: support@aecsoftware.com
- WWW: http://www.aecsoftware.com/support

For sales information, (703) 450-1980.

When you call AEC Software Technical Support, your computer and FastTrack Schedule should be running and you should be in front of your computer.

Please be prepared to provide the following information:

· Your serial number. (This number is found on the CD sleeve, the back cover of the manual, or the registration card.)
- The product version number.
- The type of hardware and the operating system on which you are running the application.
- The exact nature of your problem and what you were doing when it occurred.
- The exact message in any alerts or dialog boxes that appear on your screen in response to your problem.
- Any and all steps you have taken to solve the problem.

30.2.2 Online Help

Online help

Help is only a click away when you use FastTrack Schedule's Online Help System. FastTrack Schedule's Online Help is a comprehensive and context-sensitive help system that provides keyword searches, topic searches, and tutorials. FastTrack Schedule Online Help is available whenever FastTrack Schedule is running. It contains the most up-to-date help information available for FastTrack Schedule.

To access the online help topics when FastTrack Schedule is running, click the Help icon . On the Application tab, in the Help group, you can access: a list of keyboard shortcuts, example files and tutorials.

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You must have a web browser (such as Microsoft Internet Explorer™ or Mozilla Firefox™) installed on your computer to run FastTrack Schedule's Online Help System. You do not, however, have to be connected to the Internet.

Additional Help Options

· FastTrack Schedule Help button. This button, located in many of the dialogs, is context-sensitive and opens the FastTrack Schedule Online Help System directly to the topic page describing the related procedure.

· Tool Tips . When you hover your cursor over a button, tool, or dialog option for a few moments, a Tool Tip appears describing the item's basic features or purpose.

Extended Tool Tips and Help Tags. To display extended information about a dialog option, click the Help button with the question mark icon in the top right corner of the dialog and click a dialog option. Extended Tool Tips are available for many dialog options.

Tutorials. FastTrack Schedule provides online tutorials with instructions that you can follow on your computer or print out. Each tutorial has a practice FastTrack Schedule file to use as you work through the tutorial. Look in the Help group on the Application tab for tutorial resources.

Frequently Asked Questions. The AEC Software website now hosts a searchable, frequently-updated database of common questions received from customers about the latest version of FastTrack Schedule.
Support Knowledge Base. The AEC Software website also hosts an extensive, searchable database of commonly asked questions from recent FastTrack Schedule versions. Search by keyword, article number, or title.

30.3 Function Reference

30.3.1 Function Reference

Functions Reference

Select a category of functions from those listed below:

- Number Functions
- Text Functions
- Statistical Functions
- Logical Functions
- Date and Time Functions

- Alphabetical Listing

See also:

- Entering a calculation
- Overview of calculation columns

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» Calculation setup

30.3.2 Number Functions

Number Functions Reference

» Abs
» Cos
» Div
» Even
» Exp
» Fact
FV (Future Value)
» Ln Function
» Log
» Mod
» NullNum
» Odd
Pmt (Payment)
» Power
PV (Present Value)
» Round
» Sin
» Sqrt
» Tan
» Trunc

See also:
» Text Functions
» Statistical Functions
» Logical Functions
» Date and Time Functions

(Alphabetical Listing)

30.3.3 Text Functions

Text Functions Reference

» DateToText
» Find Function

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- FindPos
- Left
- LeftWords
- Mid
- MidWords
- NumChars
- NumToText
- NumWords
- Proper
- Replace
- Right
- RightWords
- TextToDate
- TextToNum
- TextToTime
- TimeToText
- ToLower
- ToUpper
- Trim

See also:
- Number Functions
- Statistical Functions
- Logical Functions
- Date and Time Functions

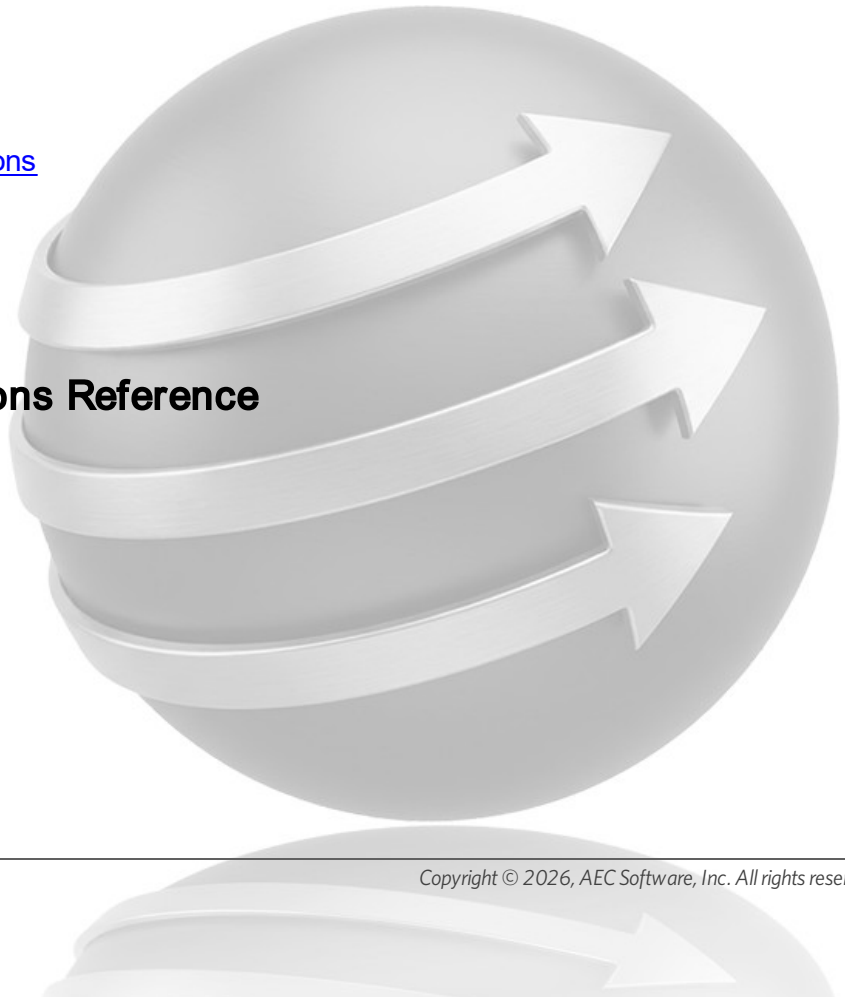
(Alphabetical Listing)

30.3.4 Statistical Functions

Statistical Functions Reference

- Ave
- AveDev
- Max Function
- StdDev

See also:
- Number Functions
- Text Functions



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- Logical Functions
- Date and Time Functions

(Alphabetical Listing)

30.3.5 Logical Functions

Logical Functions Reference

- If Function
- IsEven
- IsInt
- IsNull
- IsOdd
- TextIsDate
- TextIsNum
- TextIsTime

See also:

- Number Functions
- Text Functions
- Statistical Functions
- Date and Time Functions

(Alphabetical Listing)

30.3.6 Date and Time Functions

Date and Time Functions Reference

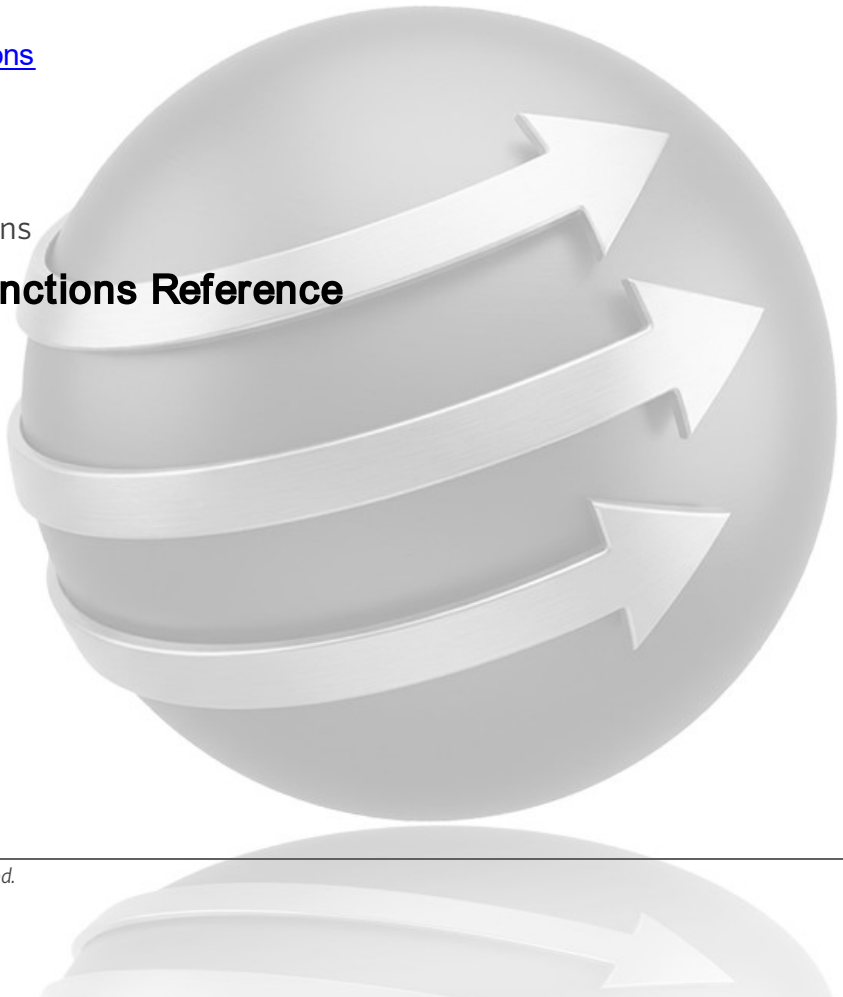
- Date
- Day Function
- DayOfWeek
- DayOfWeekName
- Duration

Duration (with times)

- Dateline Date
- Dateline Time
- Finish Date

Finish Date (with times)

- Month



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- MonthName
- Time Function
- Work Calendar Base Day Duration
- Work Calendar Day Duration
- Work Calendar Typical Day Duration
- Year

See also:
- Number Functions
- Text Functions
- Statistical Functions
- Logical Functions

(Alphabetical Listing)

30.4 Operator Reference

30.4.1 Operator Reference

Operators

Symbols that determine which operation to perform on the calculation elements:

+, -, *, =, <>, <, >, <=, >=, and, or, not

Each operator has a precedence, which determines the order in which expressions are evaluated in a calculation that contains more than one operator. FastTrack Schedule evaluates operators from left to right and performs multiplication and division before addition and subtraction. You can change the precedence by enclosing the expression you want calculated first in parentheses.

- Mathematical
- Text
- Comparison
- Logical

30.5 Comparison Operators

30.5.1 Comparison Operators

Comparison Operators

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Comparison operators compare two expressions and return either true or false (sometimes called a Boolean expression). Arithmetically, a result of true equals 1 and a result of false equals 0.

Symbol	Name	Example	Definition
=	Equal to	38 = 38 returns true	True when both items are equal
<>	Not equal to	38 <> 39 returns true	True when both items are not equal
>	Greater than	19 > 1 returns true	True when the value on the left is greater than the value on the right
<	Less than	5 < 6 returns true	True when the value on the left is less than the value on the right
>=	Greater than or equal to	19 > 1 returns true	True when the value on the left is greater than the value on the right
<=	Less than or equal to	5 < 6 returns true	True when the value on the left is less than the value on the right

IMPORTANT: When using comparison operators with functions and columns which evaluate to a date or time, remember that all arguments surrounding the operator must be of the same type: date or time. For instance, the following calculation:
If(([Start Date] < Jun 18, 2002) , "Late", "Early")
is not valid because "Jun 18, 2002" is not interpreted as a date in this case.

For this situation, use:
If(([Start Date] < TextToDate("Jun 18, 2002")) , "Late", "Early")
which converts "Jun 18, 2002" into a date so that it may be compared to [Start Date].

Or if comparing times, use:
If(([Start Time] < TextToTime("11:30 AM")) , "Late", "Early")
which converts "11:30 AM" into a time so that it may be compared to [Start Time].

» Operator Reference

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30.6 Requirements

30.6.1 Hardware and software requirements

Hardware and software requirements

FastTrack Schedule 2026 is compatible with all computer running Microsoft Windows 10 or better computers.

The following hardware and software is required to run FastTrack Schedule 2026 on Windows Computers:

- Computer properly configured and running Windows 11 32 or 64 bit, Windows 11 for ARM, or Windows 10 32 or 64 bit.
- 1.3GHz or faster Processor
- 4 GB of RAM
- 1440x900 or higher screen resolution
- 360 MB free hard disk space

31 Glossary

31.1 Tasks

Tasks

Anything you need to schedule or track. FastTrack Schedule displays tasks in rows and lets you see their start, finish, and duration as bars in the timeline graph.

There are many common terms for task: task, project, phase, event, milestone, and deadline.

31.2 Bar

Bar

Also referred to as "Task Bar." It is drawn in the timeline graph to display a task's start, finish, and duration. FastTrack Schedule lets you design and draw bars and lets you display information about each bar in columns.

31.3 Milestone

Milestone

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The type of task which occurs in a single moment of time. For instance, a deadline is a milestone because it has just a start date and a time--it has no duration or finish.

31.4 Milestones

Milestones

A milestone is used to denote a task that occurs in a single moment of time, such as a meeting or a deadline. These types of tasks have no duration. Thus, milestones consist of just one point that has a start but not a finish.

31.5 Start

Start

The start of a task is when it begins. You can set the start of a task's Scheduled, Revised, and Actual components as the start of the schedule itself.

31.6 Finish

Finish

The date and time at which a task or schedule ends. You can set the finish of a task's Scheduled, Revised, Actual component as well as for the project itself.

31.7 Duration

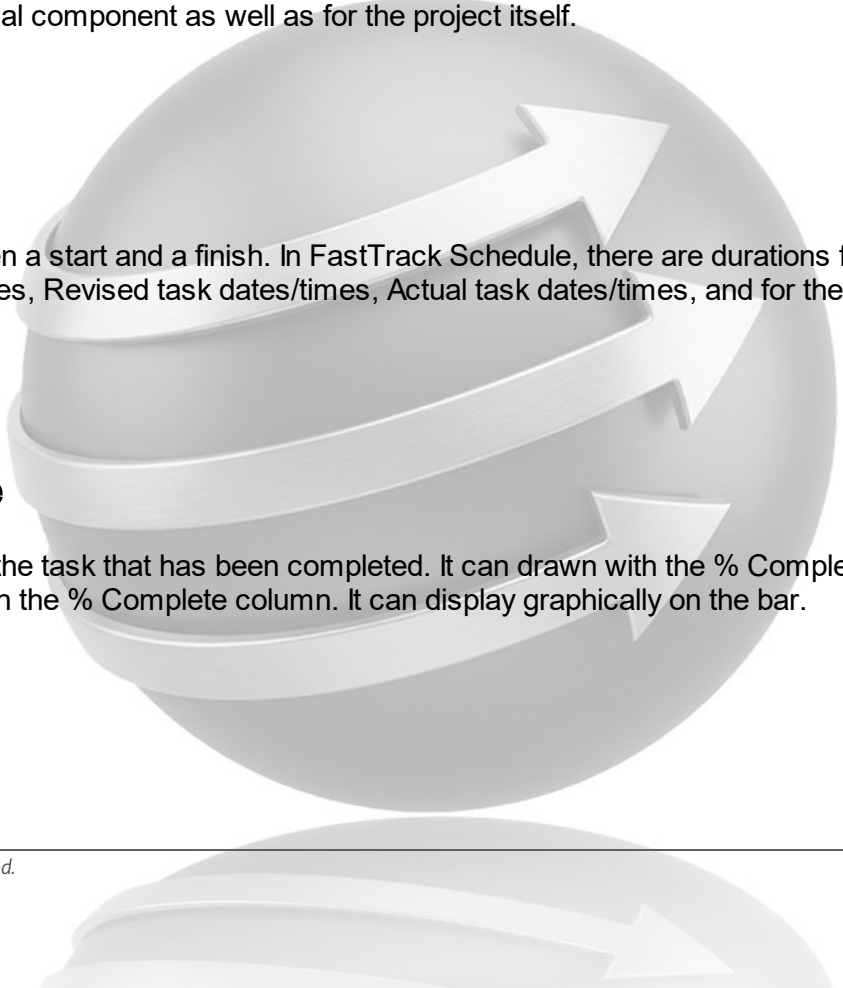
Duration

The length of time between a start and a finish. In FastTrack Schedule, there are durations for Scheduled task dates/times, Revised task dates/times, Actual task dates/times, and for the project itself.

31.8 Percent Complete

Percent Complete

The portion or amount of the task that has been completed. It can drawn with the % Complete tool or entered as a data in the % Complete column. It can display graphically on the bar.



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31.9 Scheduled Dates

Scheduled Dates

Represent when a task is planned to start and end. This is the basic component of a task bar, drawn with the Bar tool. Also called, "Baseline Dates." Part of FastTrack Schedule's Scheduled, Revised, and Actual tracking for monitoring the progress of tasks against a planned baseline.

31.10 Actual Dates

Actual Dates

The dates of a task which represent when the task actually began and finished. Interrelated with % Complete. Part of FastTrack Schedule's Scheduled, Revised, and Actual tracking for monitoring the progress of tasks against a planned baseline.

31.11 Work in Place

Work in Place

The same as the Actual component of a task or the Percent Complete.

31.12 Component

Component

Refers to task bars. Task bars have three components: Scheduled, Baseline, and Actual. Each component has a set of dates, times, and durations for which columns are defined. The display of each component is defined in the Format Bar and Milestone Style dialog.

31.13 Assignment sub-row

Assignment Sub-row

This sub-row displays all task bars to which this resource has been assigned.

You can move bars in this sub-row -- and this affects the location of the bar in the Schedule View. You can also spot allocate the resource usage from within this sub-row.

31.14 Percent Usage sub-row

Percent Usage Sub-row

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This sub-row displays the percent of the total available allocation time available for the specified resource that is being used.

The appearance of the graph can be formatted in the Format Resource Row dialog.

31.15 Full Allocation Line

Full Allocation Line

This line indicates when a resource has been allocated for the maximum amount of time possible, as defined in its work calendar.

The appearance of the line can be formatted in the Format Resource Row dialog.

31.16 Usage Graph Scale

Usage Graph Scale

A scale is available in the two Usage sub-rows of the Resource View. It helps you to gauge when a resource has reached full or over allocation.

To see the scale, the sub-row must be sized high enough to display it.

31.17 Schedule

Schedule

Contains tasks which are displayed in columns and a timeline graph that displays the tasks' bars. Each file that you create in FastTrack Schedule is a schedule.

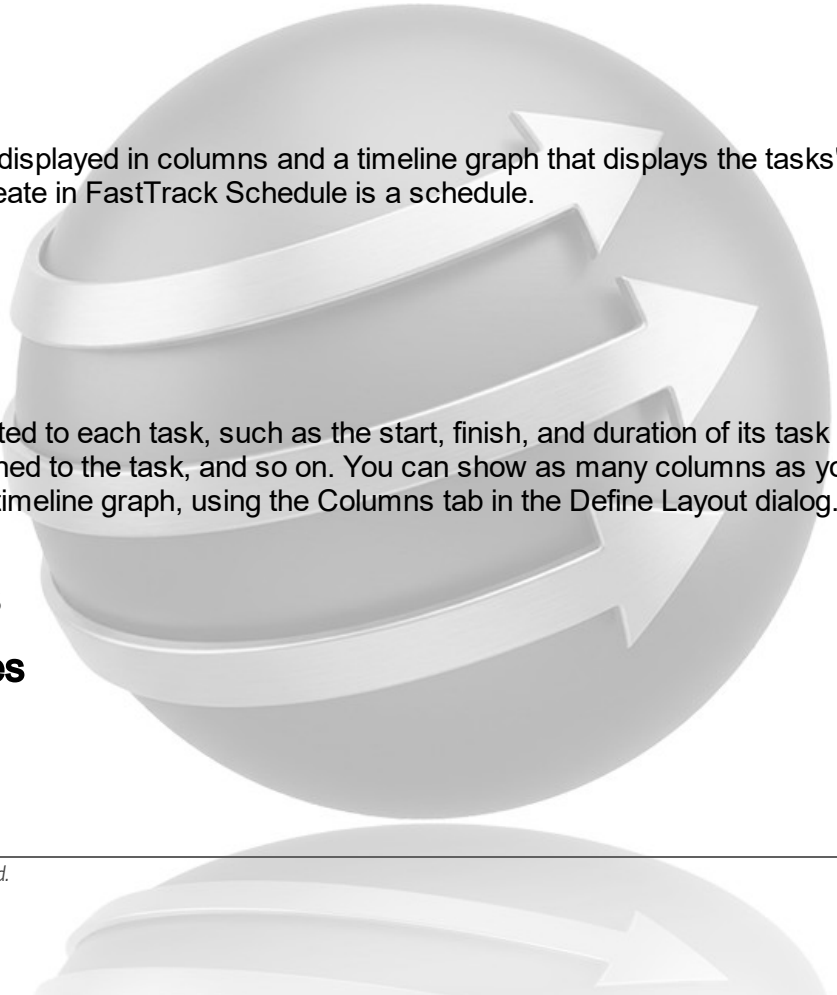
31.18 Columns

Columns

Columns display data related to each task, such as the start, finish, and duration of its task bars, the resources assigned to the task, and so on. You can show as many columns as you want on either side of the timeline graph, using the Columns tab in the Define Layout dialog.

31.19 Column Summaries

Column Summaries



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Column summaries summarize the values currently displayed in columns. They appear below the column they summarize. Six types of summaries can be performed: total, average, standard deviation, minimum, maximum, and count.

31.20 Rows

Rows

Each row contains a task or tasks and the corresponding task bar or bars. You can perform operations on rows using the Action Columns.

31.21 Timeline Graph

Timeline Graph

In the Schedule View, the timeline, or timeline graph, is the actual grid of horizontal and vertical lines on which task bars sit. In the Resource View, the timeline is the actual grid of horizontal and vertical lines on which assigned task bars and resource graphs sit. The timeline can represent any range of time you determine, in units of hours, days, weeks, months, quarters, and years.

31.22 Graph

Graph

The timeline graph of the schedule displays a graphed window of time along a continuous timeline. It contains the task bars that define the start, finish, and durations of tasks.

A summary graphs summarize the values currently displayed in columns over a particular period of time. A summary graph appears as a row under the timeline graph, making it easy to match the summary data to the corresponding time period. Six types of summary graphs can be created: Total, Average, Standard Deviation, Minimum, Maximum, and Count (as well as cumulative totals and counts). There are three types of graphs: numeric, line graph, and histogram. These can be displayed in hundreds of different styles.

31.23 Gantt Chart

Gantt Chart

A type of scheduling tool named for Henry Gantt. It displays the starts, finishes, and duration of tasks as task bars placed along a timeline graph. The Schedule View of FastTrack Schedule is a Gantt chart.

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31.24 Chart

Chart

Another word for the Timeline Graph which displays the task bars in a schedule.

Also, FastTrack Schedule makes it simple for you to print a wall chart, or large display version of your schedule, using standard paper.

31.25 Timescale Areas

Timescale Areas

Appear at the top and bottom of the schedule to label the units in the timeline graph. They contain one or more timescale rows that can be formatted to display units such as hours, days, weeks, months, quarters, fiscal quarters, years, or fiscal years.

31.26 Timescale Rows

Timescale Rows

The timescale rows act as labels for the timeline graph columns. Timescale rows can appear above and below the timeline graph. The width of the base timescale row also determines the width of the timeline graph columns.

31.27 Datelines

Datelines

Datelines allow you to display the current schedule date and time or custom defined dates and times as a vertical line drawn in the timeline graph. The options to show, hide, change the appearance of, and set the schedule date and time are available by choosing the Datelines tab of the Format Schedule View dialog.

31.28 Early Start or Finish

Early Start or Finish

Refers to a task bar that has a Revised date that is earlier than the Scheduled date. For instance, using the Revised tool, you could drag a task's Revised start date to an earlier date.

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31.29 Timeline Units

Timeline Units

Units of time displayed in the schedule. For instance, a schedule with timeline units of weeks has one timeline graph column for each week in the timeline graph. The base timescale row is the timescale row that contains the labels for the timeline units. For instance, in the case above, the base timescale row is the one that contains the week labels.

31.30 Summary Graphs

Summary Graphs

Summary graphs summarize the values currently displayed in columns over a particular period of time. A summary graph appears as a row under the timeline graph, making it easy to match the summary data to the corresponding time period. Six types of summary graphs can be created: Total, Average, Standard Deviation, Minimum, Maximum, and Count (as well as cumulative totals and counts). There are three types of graphs: numeric, line graph, and histogram. These can be displayed in hundreds of different styles.

31.31 Summary Bars

Summary Bars

Display the aggregate start, finish, and duration information for all of a task's collapsed sub-tasks.

31.32 Bar Labels

Bar Labels

Showing data on a bar and milestone style lets you add date, time, duration, % Complete, and other bar information as a label on a bar and milestone style.

Bar labels created in the Format Bar and Milestone Style dialog do not display in the Calendar View. Use the Format Calendar View dialog to create bar labels in the Calendar View.

31.33 Project Hierarchies

Project Hierarchies

Refers to the grouping or break-down of tasks into different levels. In FastTrack Schedule, project hierarchies are created by outlining tasks and their sub-tasks in the Activity Name column or by creating a Work Breakdown Structure (WBS).

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31.34 Outline

Outline

Lets you create a hierarchy of tasks. A task outline consists of higher-level tasks that contain sub-tasks within them.

31.35 Expanded

Expanded

Refers to tasks whose outline levels are not collapsed. All of their sub-tasks are visible.

31.36 Collapsed

Collapsed

Refers to tasks whose outline levels have been "rolled-up." Their sub-tasks are no longer visible.

31.37 Bar Tracking Window

Bar Tracking Window

The bar tracking window displays the date and time information about the drawn or dragged task bar. Use the Tracking tab of the Document Options dialog to customize this option.

31.38 Dependent Tasks

Dependent Tasks

Tasks which have been linked together. When one task is dependent upon another, changes to one task may affect the other.

31.39 Links

Links

Linking two task bars creates a dependency whereby, if the dates of one task change, all dependent tasks' dates change accordingly. FastTrack Schedule supports FS (Finish to Start), FF (Finish to Finish), SF (Start to Finish) and SS (Start to Start) links.

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31.40 Linking

Linking

Creates a dependency between task bars. When changes are made to one linked task, all other linked tasks may also change.

31.41 Chaining

Chaining

The process of adjusting task dates so that there are no overlaps or lead/lag time between the tasks' starts and finishes. Chaining creates a tight schedule by setting tasks' start dates to the previous bar's finish dates.

31.42 Slipping

Slipping

Refers to the act of making a date later. While you can slip the Scheduled component of a task, the term slipping usually denotes a change in the Revised dates. Revised dates can be set using the Revised tool.

31.43 Slack

Slack

Describes the amount of time before which the finish of one task affects the start of another task.

31.44 Context-Clicking

Context-Clicking

Throughout the help documentation you will see references to right-clicking on items. Right-clicking refers to clicking with your right mouse button. If your mouse does not have a right mouse button, hold down the Control key while clicking your mouse.

You right-click to access context, or shortcut, menus that pertain directly to the object on which you click.

It is a good idea to try right-clicking on every object in every view in the program to see which have a shortcut menu. Once you have discovered how to access shortcut menus, try to use them as much as possible as you work with FastTrack Schedule.

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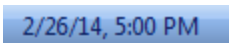
31.45 Cursor Tracking Area



The Cursor Tracking Area displays the time and/or date over which the cursor is positioned in the timeline or calendar. Use the Tracking tab of the Document Options dialog to customize this option.

31.46 Row Number Action Column

Row Number Action Column

This Action Column displays the row numbers of rows. Clicking a row number selects the row and allows you to move it.

To display the Row Number action column, on the View tab, in the Show/Hide group, click Action Columns, and choose Row Number/Select Row from the drop-down list.

You can print row numbers by choosing Print Row Numbers in the Page Options dialog.

31.47 Expand/Collapse Action Column

Expand/Collapse Action Column

This Action Column contains a triangular handle for tasks which have sub-tasks indented beneath them. To collapse an outline level, click the down-facing triangular handle to turn to the right. To expand an outline level, click the right-facing triangular handle to turn it downwards.

To display the Expand/Collapse action column, on the View tab, in the Show/Hide group, click Action Columns, and choose Outline from the drop-down list.

31.48 Out of Range Days

Out of Range Days

In the Format Calendar View dialog, you can choose whether or not to shade Out-of-Range days. You can also format the color and pattern of the shading.

31.49 Calendar Title

Calendar Title

The title is, by default, the current calendar range. You can choose to show or hide the title in the Format Calendar View dialog.

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You can use headers and footers to create custom titles that will display when the calendar is printed.

31.50 Text Boxes

Text Boxes

Text boxes are graphic items that contain small chunks of text. They can be added to the Schedule View or Print Preview windows. You can use text boxes to describe items in your schedule, to present notes that stand out, or to create headers and footers for your schedule.

31.51 Pictures

Pictures

Pictures are graphic items that contain images (e.g. clip art) that you paste into the Schedule View or Print Preview windows and in the Resource View within image columns.

31.52 Legends

Legends

Legends are graphic items that describe what the bar and milestone styles on the schedule represent. They contain an image of a bar and milestone style and a label that captures the meaning of a bar and milestone style. They can be added to the Schedule View or Print Preview windows.

31.53 Pointers

Pointers

Pointers are lines that branch out from items, such as text boxes and pictures, and extend to any point on the timeline graph to which you want the item to refer. Frequently, items are situated on the timeline in such a way that it is not clear with what they are to be associated. Pointers act as a graphic representation of the relatedness of an item to some part of the schedule, such as a bar or a point in time. Pointers are only available in the Schedule View.

31.54 Bar and Milestone Styles group

Bar and Milestone Styles Group

The cells of the Bar and Milestone Styles drop-down list contain the bar and milestone styles defined for the schedule. You can use the Bar and Milestone Styles Toolbar to design a new

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bar and milestone style, edit an existing bar and milestone style, or change the bar and milestone style applied to a task.

31.55 Arrow tool

Arrow tool. The general-purpose tool that selects, resizes, and moves items in all Views. When you want to drag a task bar, this is the tool you need to have selected.

31.56 Bar tool

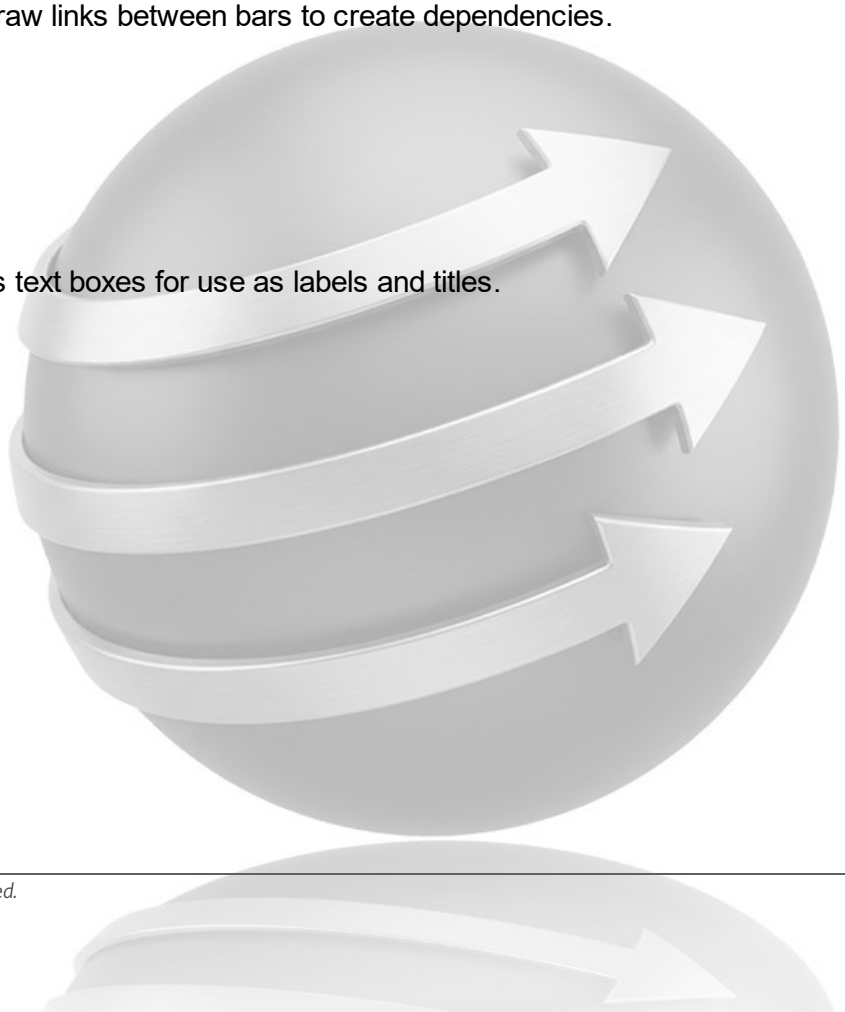
Bar tool. Draws task bars in the timeline graph.

31.57 Link tool

Link Bars tool. Lets you draw links between bars to create dependencies.

31.58 Text tool

Text tool. Draws and edits text boxes for use as labels and titles.



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Index

- A -

Accessing Application Options 49
Accessing Document Options 56
Action Columns 18
Actual Dates 292
Adding pictures 266
Adding pointers to items 264
Adding Print Headers and Footers 189
Adding text boxes 262
Adding Titles and Pictures to Print Preview 191
AEC Software support services 283
Aligning Items to Grids 242
Applying a Filter 211
Applying a Layout 184
Applying a Range 45
Applying a Report 187
Applying a Sort 216
Arrow Tool 301
Assigning Resources to Task Bars 171
Assignment Sub-row 292
Auto-Fitting Column Width 110
Auto-Fitting Row Height 86

- B -

Bar 290
Bar and Milestone Styles Group 300
Bar Labels 296
Bar Tool 301
Bar Tracking Window 297
Breaking Printed Pages at Rows 194
Bringing Items to Front 259

- C -

Calculating Task Bar Durations in Work Units 155
Calendar Title 299
Capturing Task Bar and Milestone Dates into Baseline 131
Chaining 298
Changing a Bar or Milestone to a Different Style 116
Changing Font Attributes of Column Headings 105
Changing the Column Name 97
Changing the Font Attributes of Cells 106
Changing the Font Attributes of Rows 82
Changing the Font Attributes of Summary Graph Rows 234
Changing the font attributes of text boxes 263
Changing the Font Attributes of Timescale Rows 227
Changing the Height of Summary Graph Rows 235
Changing the Height of Timescale Rows 228
Changing the Resource Duration Units 66
Changing the Schedule Duration Units 65
Changing the Timeline Range 64
Changing the Timeline Units 65
Changing the Width of Columns 110
Changing the Width of Timescale & Timeline Columns 228
Chart 295
Checking for Spelling Errors 35
Choosing Data to Summarize in Summary Graph Rows 231
Choosing Page Options 196
Choosing Summary Operations for Summary Graph Rows 232
Choosing Units for Summary Graph Rows 231
Collapsed 297
Collapsing Tasks and Resource Sub-Rows 75
Column Summaries 293
Columns 293
Combining Files Into a Portfolio 219
Comparison Operators 288
Component 292
Context-Clicking 298
Converting Mac Schedule Files to Windows Schedule Files 25
Converting Schedule Files Built with a Previous Version 26
Creating a Column/Value Filter 205
Creating a Date/Time Filter 206
Creating a New Bar and Milestone Style 118
Creating and Editing Resource Work Calendars 169

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Creating Custom Task Bar Point Styles 122
Creating or Editing Filters 201
Creating Resources 168
Critical Path and Task Bar Priority 142
Cursor Tracking Area 299

- D -

Date and Time Functions Reference 287
Datelines 295
Defining a Calculation Column 245
Defining a Layout 181
Defining a New FastSteps Sequence 273
Defining a Range 44
Defining a Report 185
Defining Alignment Grids 237
Defining and Editing a Work Calendar 152
Defining Column Summaries 99
Defining Default Values 97
Defining Find and Replace Text 37
Defining Font Attributes of a Selected Item 35
Defining Picture Alignment 240
Defining Sort Criteria 213
Defining Task Bar Alignment 125, 238
Defining Task Bar and Milestone Actual Dates and % Complete 128
Defining Task Bar and Milestone Baseline Dates 127
Defining Task Bar and Milestone Scheduled Dates 126
Defining Text Box Alignment 239
Defining Types of Task Bars Links 136
Defining Value Lists 100
Deleting a Bar or Milestone 116
Deleting a FastSteps Sequence 274
Deleting a Filter 209
Deleting a Layout 183
Deleting a Range 46
Deleting a Report 186
Deleting a Sort 215
Deleting Summary Graph Rows 230
Dependent Tasks 297
Displaying a Work Calendar 154
Displaying Columns 93
Displaying Outline Levels 74
Displaying Task Bar and Milestone Scheduled, Baseline, and Actual Bar Parts 129
Dragging and Dropping Schedule Files 28
Dragging Linked Task Bars 140
Dragging Task Bars and Milestones 114
Dragging Task Bars Using the Work Calendar 156
Drawing Task Bars and Milestones 113
Duplicating a FastSteps Sequence 275
Duplicating a Filter 210
Duplicating a Layout 183
Duplicating a Range 47
Duplicating a Report 186
Duplicating a Sort 215
Duration 291

- E -

Early Start or Finish 295
Editing a Range 45
Editing an Existing Bar and Milestone Style 119
Editing an Existing FastSteps Sequence 274
Editing Schedule File Properties 41
Editing text boxes 262
Effort Driven and Fixed Duration Scheduling 43
Entering a Calculation 245
Entering and Editing Hyperlinks 102
Entering Task and Resource Names 73
Expand/Collapse Action Column 299
Expanded 297
Expanding Tasks and Resource Sub-Rows 76
Export iCalendar Options 278
Exporting Data 250
Exporting Data as a Microsoft Project XML File 255
Exporting Data as a Picture 255
Exporting Data as an iCalendar File 278
Exporting Data as HTML 253
Exporting the Page as a Picture 198

- F -

Finish 291
Fitting the Document to a Number of Pages 192
Format the Appearance of Task Bars Links 138
Formatting a Bar and Milestone Style 117

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Formatting Datelines 70
Formatting Font Styles by Outline Level 107
Formatting Graph Data in the Resource View 178
Formatting Items 260, 267
Formatting legends 270
Formatting pointers 265
Formatting Row Text in the Resource View 175
Formatting Rows by Outline Level 81
Formatting Rows in the Resource View 83, 176
Formatting Rows in the Schedule View 79
Formatting Summary Bars 85
Formatting Summary Graph Rows 230
Formatting Text in the Calendar View 160
Formatting the Appearance of Gridlines in the Calendar View 162
Formatting the Calendar View 157
Formatting the Display of a Critical Path 143
Formatting the Display of Bar Labels in the Calendar View 161
Formatting the Display of Bars in the Calendar View 159
Formatting the Display of Column Data 104
Formatting the Display of Summary Graph Rows 233
Formatting the Display of the Calendar in the Calendar View 158
Formatting the Text of Bar Labels in the Calendar View 161
Formatting the Timeline's Gridlines 67
Formatting Timescale Row Gridlines 226
Formatting Timescale Row Units 225
Formatting timescale rows 223
Full Allocation Line 293
Functions Reference 284

- G -

Gantt Chart 294
Going to Row Number 87
Going to Task Bar 117
Going to Today 34
Graph 294

- H -

Hardware and software requirements 290
Hiding Columns 94

- I -

Import iCalendar Options 278
Importing Data 247
Importing iCalendar Files 277
Inserting a Picture 250
Inserting legends 270
Inserting New Summary Graph Rows 229
Inserting New Timescale Rows 225
Inserting Page #, Date, Time, and File Name (AutoText) 190
Inserting Rows 73
Introduction To The Calendar View 16
Introduction To The Resource View 17
Introduction To The Schedule View 16

- K -

Keyboard Shortcuts 280

- L -

Labeling Summary Graph Rows 234
Launching a File or URL Address 104
Legends 300
Link Tool 301
Linking 298
Linking Task Bars 137
Links 297
Locking and Unlocking Columns 96
Logical Functions Reference 287

- M -

Making a Wall Chart 193
Managing Task Bars Links 134
Milestone 290
Milestones 291
Moving Columns 95
Moving legends 271

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Moving pictures 269
Moving Rows 77
Moving Summary Graph Rows 235
Moving text boxes 263
Moving Timescale Rows 227

- N -

Navigating in the Views 29
New Schedule 23
Number Functions Reference 285

- O -

Online help 283
Opening A Schedule 23
Opening the Information Form 145
Operator Reference 288
Out of Range Days 299
Outline 297
Outlining Tasks 74
Overview of Using Calculations 243

- P -

Percent Complete 291
Percent Usage Sub-row 292
Pictures 300
Pointers 300
Portfolio Management and Work Calendars 220
Printing Schedules 195
Printing the Calendar View 164
Progress Tracking Example 132
Project Hierarchies 296
Project Wizard 23
Publishing Schedules as iCalendar Files 276

- R -

Resizing legends 272
Resizing pictures 269
Resizing Rows 76
Resizing text boxes 263
Resizing Timeline Columns 67
Resource Assignment Overtime 180
Resource Assignment Spot Allocation 179
Resource Assignments 179
Restoring Hidden Rows 213
Restoring Sorted Rows 217
Row Number Action Column 299
Rows 294
Running an Existing FastSteps Sequence 275

- S -

Saving a Schedule 24
Schedule 293
Schedule View Column Guide 88
Scheduled Dates 292
Selecting Rows 72
Sending Items to Back 259
Setting a Schedule File Password 39
Setting AutoArchive Options 55
Setting Currency Options 61
Setting Date Options 50
Setting Document Specific AutoArchive Options 63
Setting Editing Options 54
Setting Filter Options 202
Setting General Application Options 50
Setting General Document Options 59
Setting Number Options 53
Setting Privacy Options 64
Setting Project Options 57
Setting QuickLook Options 62
Setting Save Options 55
Setting Task Bar and Milestone Dates from Baseline 132
Setting Task Bar Constraints 122
Setting the Calendar View Page Options 164
Setting Time Options 52
Setting Tracking Options 61
Setting Up the Page 198
Setting Update Options 56
Shifting Items in the Timeline 69
Showing and Hiding Action Columns 111
Showing and Hiding Column Headings and Timescales 108
Showing and Hiding Resource Sub-Rows 78
Showing and Hiding Rows 77, 212
Showing and Hiding Summary Graph Rows 229
Showing and Hiding Task Bars Links 140
Showing and Hiding the Alignment Grid 236

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Showing and Hiding the Critical Path 144
Showing, Hiding, and Mirroring Timescale Areas 224
Slack 298
Slipping 298
Snapping Items to Grids 242
Start 291
Statistical Functions Reference 286
Summary Bars 296
Summary Graphs 296

- T -

Task Bar and Milestone Scheduled, Baseline, and Actual Dates 126
Tasks 290
Text Boxes 300
Text Functions Reference 285
Text Tool 301
The All Bars Range 48
The Bar and Milestone Styles Group 20
The Master Range 47
The Timeline Range 22
The Tools Control 19
The Views Group 21
Timeline Graph 294
Timeline Units 296
Timescale Areas 295
Timescale Rows 295
Typing Dates to Draw Task Bars and Milestones 115

- U -

Understanding Lead and Lag Time of Task Bars Links 141
Understanding Task Bar Constraints 120
Understanding the Project Portfolio 218
Understanding the Resource Information Form 167
Understanding Work Contours 173
Unlinking Task Bars 137
Unpublishing an iCalendar File 277
Updating a Portfolio Master File 222
Usage Graph Scale 293
Using a Work Breakdown Structure 109
Using Action Columns 111
Using Alignment Grids 236
Using Context Menus 29
Using Print Preview 188
Using Shift Schedule 68
Using the Column Map 96
Using the ExpressDate Pop-Up Calendar 31
Using the ExpressTime Pop-Up Clock 32
Using the Project Information Form 30
Using the Schedule Publish Log 279
Using Value Lists 102
Using XML Files with FastTrack Schedule 42

- W -

What are FastSteps? 272
What are the Elements of a Calculation? 244
What is a Calculation? 243
What is a Critical Path 142
What Is a Layout? 181
What Is a Reports? 184
What Is a Task Bars Link 133
What is a Work Calendar? 151
What is FastTrack Schedule? 15
What Is the Calendar View? 156
Work in Place 292
Working in the Assignments Tab of Task Bars Tab of the Information Form 150
Working in the Columns Tab of Task Bars Tab of the Information Form 149
Working in the Links Tab of Task Bars Tab of the Information Form 150
Working in the Row Tab of the Information Form 146
Working in the Tracking Tab of Task Bars Tab of the Information Form 147
Working With a Portfolio Master File 221
Working with Columns 87
Working with Filters and Sorts 200
Working with iCalendar Files 276
Working with Print Preview 187
Working With Ranges 44
Working with Resource View Filters 208
Working with Resources 166
Working With Rows 71
Working with Schedule and Calendar View Filters 201
Working with Task Bar Labels 123
Working with Task Bars and Milestones 112

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Working with Text Boxes, Pictures, and Legends 257
Working with Timescale Rows 223

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