



Module 01 – ProjectPro Basic
Chapter 05
APOS SETUP & STRUCTURE

| Date | Version | ProjectPro Version | Author |
|------------------|----------------|---------------------------|-----------------|
| October 13, 2023 | 1.0 | Modified Version | Functional Team |

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APOS DEFINITION

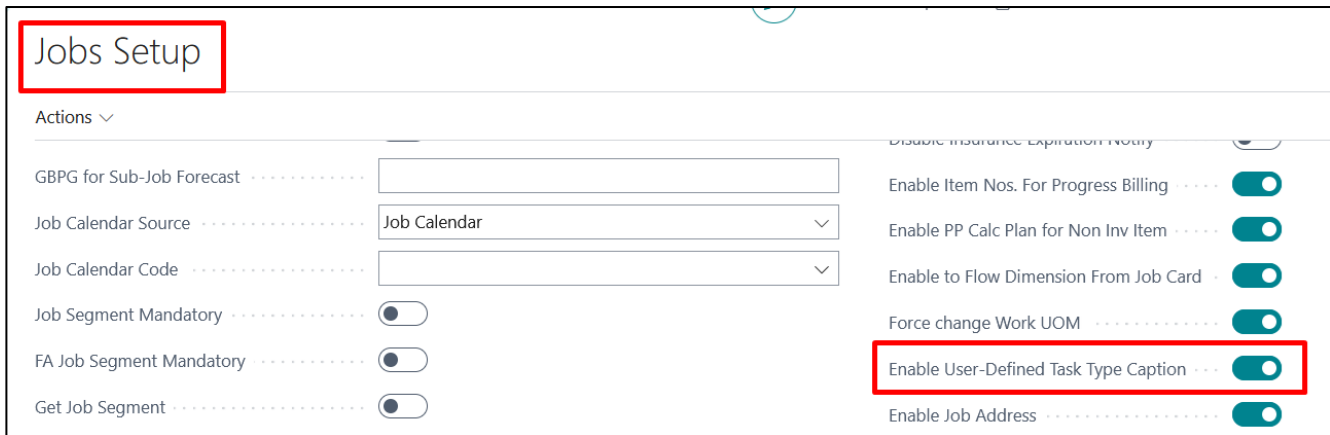
APOS stands for **Activity → Process → Operations → Sections**, which means we can categorize the Tasks in a Job by these four levels to create any Job Task No. in the Job Task Lines. Once the Task Code is selected as an Activity Code, you can select the Process Code which is required to accomplish the Activity, you can further choose the Operations Code which are required to accomplish the Process, and once the Operations has been selected you can further choose the Sections Code for the Operation selected.

APOS are basically the different levels for the Task Selected in Terms of Activity, Process, Operations & Sections.

APOS SETUPS

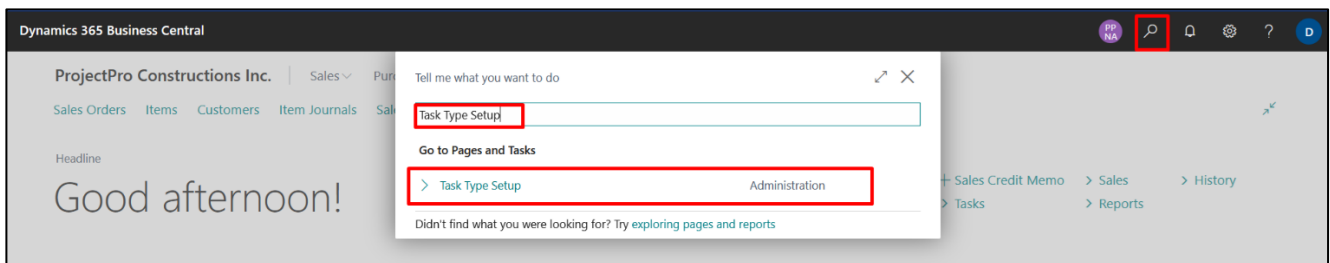
1. Jobs Setup

The user can change the naming convention for the Task Types, i.e., Activities, Process, Operation and Section. For this, you can go to Jobs Setup and check the Boolean for “Enable User-Defined Task Type Caption” under General fast tab.



2. Task Type Setup

If the Jobs Setup defined above is enabled, you need to update the “Task Type Setup” for the naming convention you want to use for the Tasks.



Once we click on the result “Task Type Setup” page will open, where we can customize the APOS as per our requirements.

ProjectPro Basic – APOS Setup & Structure

Task Type Setup

General

Activity Code Activity Operation Code Operation
 Process Code Process Section Code Section

User Task Setup

User Task Alert No. of Days

To customize the “APOS” click on the drill down option of the “Activity Code” and select the “NEW” Option.

Task Type Setup

General

Activity Code Activity Operation Code Operation
 Process Code Process Section Code Section

User Task Setup

User Task Alert No. of Days

| Code ↑ | Description |
|---------------|---------------------------|
| → Activity | Activity Description |
| Activity Code | Activity Code Description |

+ New
Select from full list

After clicking on “New”, you will be able to create the “New Activity Code” and to apply that we need to click on “OK”.

Select - APOS Caption Master

🔍 ✓ + New 🗑 Edit List ...

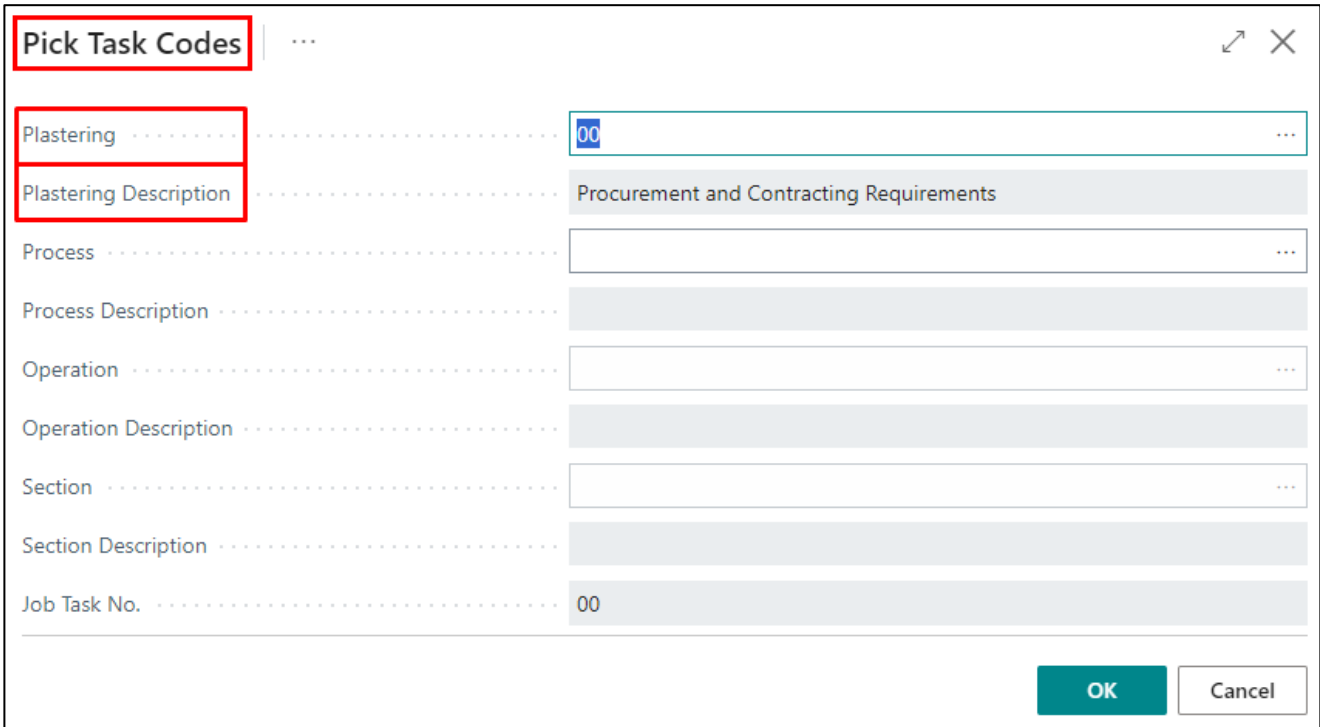
| Code ↑ | Description |
|--------------|------------------------|
| → Plastering | Plastering Description |
| Activity | Activity Description |

OK
Cancel

Once clicked on “OK” the newly created Activity Code will be selected as the default, which can be seen everywhere in the system, for example, while creating the New Task Line to select the Task in Activity Code.

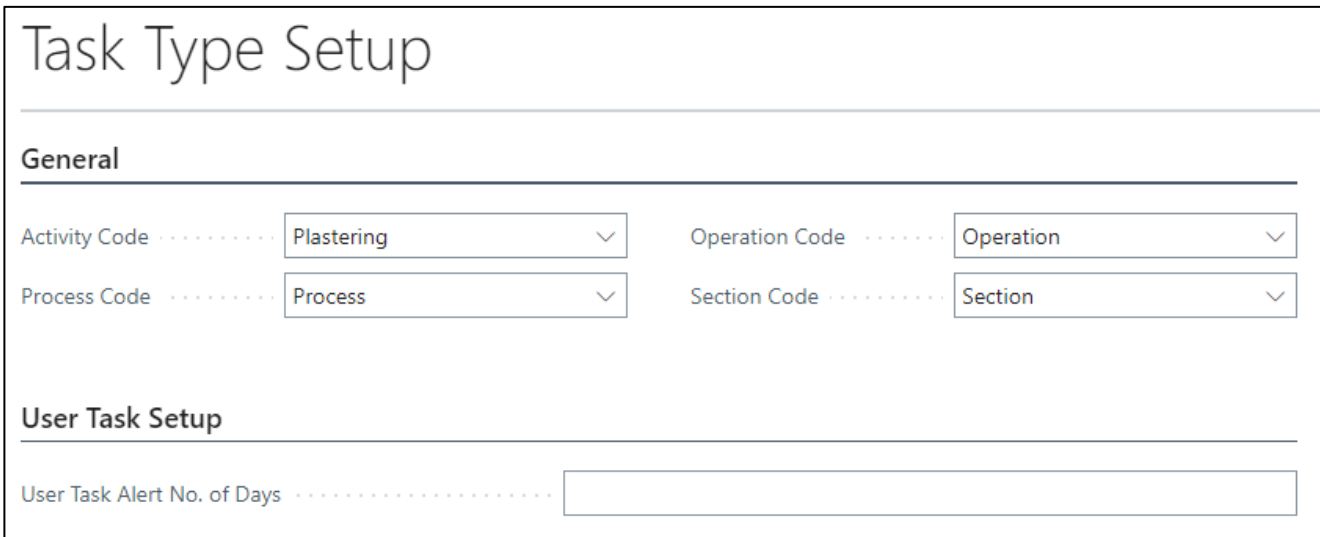
To do that, open a Job and click on Process → Job Task Lines. Select a Job Task No. by clicking on the three dots

– “(...)” to notice the Activity Code and Description is replaced by the customized name as “Plastering”.



In the above screenshot “Pick Task Codes” has been highlighted because the caption of that was “Pick APOS Codes” earlier which has now been changed to “Pick Task Codes”.

To change the Process, Operation, Section codes, follow the same process as defined above while creating the new Activity Code Name.



APOS STRUCTURE – JOB ACTIVITIES

The default set of APOS can be set on the Job Activities page. The codes and structure defined here can be used throughout the company for all jobs. To do that search for the page with the same name and below page will open.

| Type ↑ | Code ↑ | Description | Default onto each Job | Job Task Type | Totalling | Default Task for Job Type | New Page | No. of Blank Lines | Indentation | Default Project Burden Percent | Default Service Burden Percent | Blocked |
|--------|--------|-----------------------------------|-------------------------------------|---------------|-----------|---------------------------|--------------------------|--------------------|-------------|--------------------------------|--------------------------------|--------------------------|
| Cost | 00 | Procurement and Contracting R... | <input type="checkbox"/> | Begin-Total | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 000 | Procurement and Contracting R... | <input checked="" type="checkbox"/> | Begin-Total | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 001 | General Requirements | <input checked="" type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 002 | Existing Conditions | <input checked="" type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 003 | Concrete | <input checked="" type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 004 | Masonry | <input checked="" type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 005 | Metals | <input checked="" type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 006 | Wood, Plastics, and Composites | <input checked="" type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 007 | Thermal and Moisture Protectio... | <input checked="" type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 008 | Openings | <input checked="" type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 009 | Finishes | <input checked="" type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 01 | General Requirements | <input type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 02 | Existing Conditions | <input type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 03 | Concrete | <input type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 8.00 | 12.00 | <input type="checkbox"/> |
| Cost | 04 | Masonry | <input type="checkbox"/> | Posting | posting | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 05 | Metals | <input type="checkbox"/> | Posting | posting | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |

The first page that appears is where you define the Activity Codes. You can set the task to default on each job either by just the code or by the Job Type. Apart from that you can set the default Burden Percentages as well.

Also, if any of the code is not required anymore, then you can block them by checking on “Blocked” Boolean against the required unused code.

This first page of “Activity” further takes you to the “Process” which takes you to the “Operations” and that takes you to the fourth level called “Sections”, see below.

Note: The levels will be set as per the line selection, i.e., if you click on Process or any other level, then it will be defined for the code you have selected on the previous page. This will be followed by other levels as well.

| Type ↑ | Code ↑ | Description | Default onto each Job | Job Task Type | Totalling | Default Task for Job Type | New Page | No. of Blank Lines | Indentation | Default Project Burden Percent | Default Service Burden Percent | Blocked |
|--------|--------|----------------------------------|-------------------------------------|---------------|-----------|---------------------------|--------------------------|--------------------|-------------|--------------------------------|--------------------------------|--------------------------|
| Cost | 00 | Procurement and Contracting R... | <input type="checkbox"/> | Begin-Total | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 000 | Procurement and Contracting R... | <input checked="" type="checkbox"/> | Begin-Total | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 001 | General Requirements | <input checked="" type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |
| Cost | 002 | Existing Conditions | <input checked="" type="checkbox"/> | Posting | | | <input type="checkbox"/> | 0 | 0 | 0.00 | 0.00 | <input type="checkbox"/> |

ProjectPro Basic – APOS Setup & Structure

Cost - 00 ✓ Saved

Processes Search + New Edit List Delete **Operations**

| Activity Code ↑ | Code ↑ | Search Code | Description | Default onto each Job | Default Project Burden Percent | Default Service Burden Percent | Default Task for Job Type | Job Task Type | Totaling |
|-----------------|--------|-------------|------------------------------------|--------------------------|--------------------------------|--------------------------------|---------------------------|---------------|----------|
| 00 | 01 | | Procurement and Contracting Re... | <input type="checkbox"/> | 0.00 | 0.00 | | Posting | |
| 00 | 03 | | Initialization | <input type="checkbox"/> | 0.00 | 0.00 | | Posting | |
| 00 | 10 | | Solicitation | <input type="checkbox"/> | 0.00 | 0.00 | | Posting | |
| 00 | 11 | | Advertisements and Invitations ... | <input type="checkbox"/> | 0.00 | 0.00 | | Posting | |
| 00 | 20 | | Instructions for Procurement | <input type="checkbox"/> | 0.00 | 0.00 | | Posting | |
| 00 | 21 | | Instructions | <input type="checkbox"/> | 0.00 | 0.00 | | Posting | |
| 00 | 22 | | Supplementary Instructions | <input type="checkbox"/> | 0.00 | 0.00 | | Posting | |
| 00 | 23 | | Procurement Definitions | <input type="checkbox"/> | 0.00 | 0.00 | | Posting | |

Cost - 00 - 01 ✓ Saved

Operations Search + New Edit List Delete **Sections**

| Activity Code ↑ | Process Code ↑ | Code ↑ | Search Code | Description | Default onto each Job | Default Project Burden Percent | Default Service Burden Percent | Default Task for Job Type |
|-----------------|----------------|--------|-------------|------------------------|--------------------------|--------------------------------|--------------------------------|---------------------------|
| 00 | 01 | 01 | | Project Title Page | <input type="checkbox"/> | 0.00 | 0.00 | |
| 00 | 01 | 03 | | Project Directory | <input type="checkbox"/> | 0.00 | 0.00 | |
| 00 | 01 | 05 | | Certifications Page | <input type="checkbox"/> | 0.00 | 0.00 | |
| 00 | 01 | 07 | | Seals Page | <input type="checkbox"/> | 0.00 | 0.00 | |
| 00 | 01 | 10 | | Table of Contents | <input type="checkbox"/> | 0.00 | 0.00 | |
| 00 | 01 | 15 | | List of Drawing Sheets | <input type="checkbox"/> | 0.00 | 0.00 | |
| 00 | 01 | 20 | | List of Schedules | <input type="checkbox"/> | 0.00 | 0.00 | |

Cost - 00 - 01 - 01 ✓ Saved

Sections Search + New Edit List Delete

| Activity Code ↑ | Process Code ↑ | Operation Code ↑ | Code ↑ | Search Code | Description | Defa... onto each Job | Default Project Burden Percent | Default Service Burden Percent | Default Task for Job Type |
|-----------------|----------------|------------------|--------|-------------|-------------|--------------------------|--------------------------------|--------------------------------|---------------------------|
| 00 | 01 | 01 | | | | <input type="checkbox"/> | 0.00 | 0.00 | |