

# TOPIC A

## Use View Commands

You can use a variety of views to focus on specific aspects of your project.

### Default Views

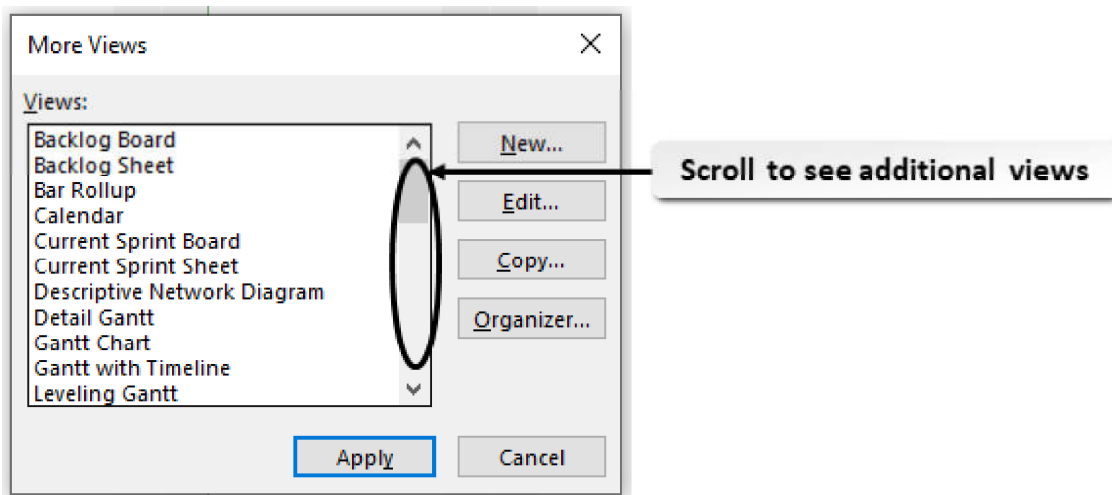
**Views** in Microsoft Project provide a visual representation of project data that is useful in tracking your project. Views typically contain a combination of two or more tables and charts. For example, you can have a view that helps you track the progress, or a view that shows you how your team resources are being used. Here is a table of the most commonly used views and what they show.

<b>View</b>	<b>Description</b>	<b>Use To</b>
<b>Calendar</b>	Shows the project schedule in calendar format. You can view tasks by month, week, or by a custom time period.	See which tasks are scheduled for a particular day or week.
<b>Gantt Chart</b>	Shows project tasks in two ways: as a list, and as bars plotted against the project timeline. This is the default view.	See a list of tasks and a graphical depiction of when they are scheduled to occur.
<b>Network Diagram</b>	Shows the dependencies between tasks.	See a graphical depiction of how tasks are sequenced.
<b>Task Board</b>	(Only available to Project Online subscribers.) Shows an <i>agile</i> project, and a <i>waterfall</i> project in a more agile way, similar to the <i>Kanban</i> for <i>Scrum</i> methodology.	Move tasks through a workflow in a drag-and-drop manner.
<b>Task Form</b>	Shows information about each task, one task per screen.	Work on one task at a time without using the <b>Task Information</b> dialog box.
<b>Task Sheet</b>	Shows all of the project tasks as a list; similar to the Gantt chart without depicting the tasks as bars plotted against the project timeline.	See a list of tasks.
<b>Task Usage</b>	Shows a table of all of the tasks, which resources are assigned to each task, and how many hours each resource is scheduled to take per unit of time.	See the number of hours a task or its assigned resources will use in total or for a unit of time.
<b>Timeline</b>	Shows only those tasks you wish to see plotted against the project timeline. This is the same view that is shown by default in the pane above the main view.	See key tasks in a time plot.
<b>Tracking Gantt</b>	Shows baseline and scheduled Gantt bars for each task.	Compare the baseline schedule with the actual schedule.
<b>Resource Form</b>	Shows information about each resource, one resource per screen.	Work on one resource at a time without using the <b>Resource Information</b> dialog box.

View	Description	Use To
<b>Resource Graph</b>	Shows what percentage of each resource is being used per unit of time shown in the timeline, one resource per screen. Overallocated resources appear in red.	See when each resource is allocated and overallocated.
<b>Resource Sheet</b>	Shows all of the project resources as a list. You are already familiar with this view.	See a list of all project resources and detailed information about each one.
<b>Resource Usage</b>	Shows a table of all the resources, which tasks each resource is assigned to, and how many hours each task is scheduled to take per unit of time.	See a list of all resources and the tasks to which each resource is assigned.
<b>Team Planner</b>	(Not available in Microsoft Project Standard.) Shows in a graph all the resources and the tasks to which each resource is assigned per unit of time shown in the timeline. Overallocated resources appear in red. You should already be familiar with this view.	See a graphical depiction of each resource, the tasks to which each is assigned, and when each resource will work on its assigned tasks.

## The More Views Dialog Box

In addition to the 14 most common views, there are 22 others from which you can choose. You can access the **More Views** dialog box by right-clicking to the left of the task numbers and selecting **More Views**, or by selecting any of the **Other Views** commands. Scrolling through the list will show all of the other views.



*Figure 2-1: The More Views dialog box shows all of the views in Project.*

Here is a table of those views and what they show.

<b>View</b>	<b>Description</b>	<b>Use To</b>
<b>Backlog Board</b>	Shows next-up and in-progress tasks for an agile project, and a waterfall project in a more agile way, similar to the Kanban for Scrum methodology.	View tasks which have not been completed.
<b>Backlog Sheet</b>	Similar to a <b>Backlog Board</b> , but shows tasks in a list.	View tasks which have not been completed.
<b>Bar Rollup</b>	Shows only summary tasks.	See a high-level summary of a complex project plan.
<b>Current Sprint Board</b>	Shows current <i>sprints</i> in a board view.	See information about current sprints.
<b>Current Sprint Sheet</b>	Shows current sprints in a table.	See information about current sprints.
<b>Descriptive Network Diagram</b>	Shows more information for each node than in the regular network diagram.	Review or prepare to print a detailed network diagram.
<b>Detail Gantt</b>	Shows more information about each task bar than in the regular Gantt chart, including the critical path.	Review or prepare to print a detailed Gantt chart.
<b>Gantt with Timeline</b>	Shows the <b>Timeline</b> view in the upper pane and the <b>Gantt Chart</b> view in the lower pane.	Compare the high-level timeline and the Gantt chart.
<b>Leveling Gantt</b>	Shows schedule delays caused by resource leveling.	Identify changes made by automatic leveling of resources.
<b>Milestone Date Rollup</b>	Shows all tasks concisely labeled with milestone marks and dates on summary Gantt bars.	View only milestones when preparing a status update.
<b>Milestone Rollup</b>	Shows all tasks concisely labeled with milestone marks on summary Gantt bars.	See a high-level summary with milestones.
<b>Multiple Baselines Gantt</b>	Shows a Gantt chart with baselines for all tasks displayed against the timeline.	Visually compare schedules between multiple baselines.
<b>Relationship Diagram</b>	Shows each task, one task per screen, along with its predecessors and successors and the types of dependencies it has with its predecessors and successors.	Review the relationships in detail for individual tasks.
<b>Resource Allocation</b>	A split view that shows the <b>Resource Usage</b> view in the top pane. When a task is selected, a Gantt chart of just that task is shown in the bottom pane.	Review how resources are allocated to individual tasks.
<b>Resource Name Form</b>	Similar to the <b>Resource Form</b> view, but shows less detail about the resource.	Prepare a report of project resources.
<b>Sprint Board</b>	Shows all sprints in an agile project in a board view.	View all sprints.
<b>Sprint Planning Board</b>	Shows all sprints during the Sprint Planning stage of an agile project.	View sprints in the Sprint Planning stage.

<b>View</b>	<b>Description</b>	<b>Use To</b>
<b>Sprint Planning Sheet</b>	Similar to a <b>Sprint Planning Board</b> , but shows tasks in a list.	View sprints in the Sprint Planning stage.
<b>Task Board Sheet</b>	Similar to a <b>Task Board</b> , but shows tasks in a list.	Move tasks through a workflow in a drag-and-drop manner.
<b>Task Detail Form</b>	Similar to the <b>Task Form</b> view, but shows more detail about the task.	Review or prepare to print details about project tasks.
<b>Task Entry</b>	A split view that shows the <b>Gantt Chart</b> view in the top pane and the <b>Task Form</b> view in the bottom pane. When you select a task in the upper pane, its information is shown in the bottom pane.	Modify details on tasks.
<b>Task Name Form</b>	Similar to the <b>Task Form</b> view, but shows less detail about the task.	Prepare a report of project tasks.

## Views Available Only to Project Online Subscribers

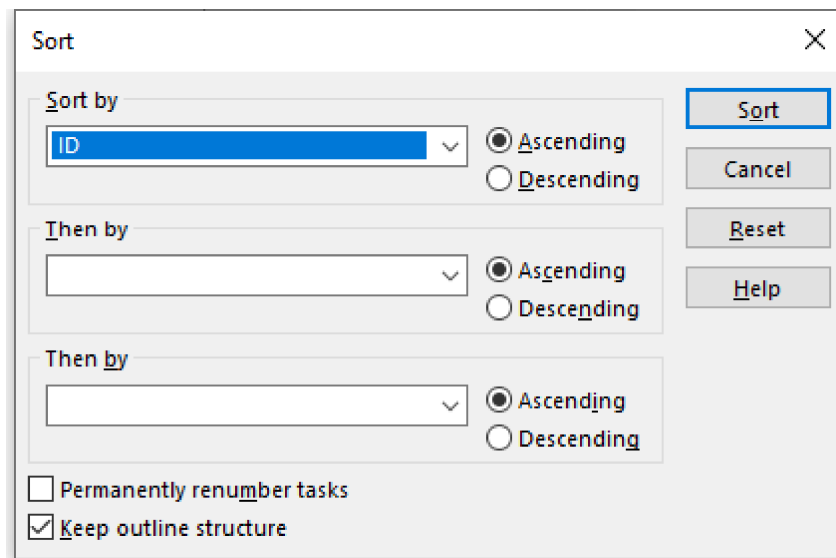
The following views are used to manage agile projects, and are available only to Project Online subscribers:

- Backlog Board
- Backlog Sheet
- Current Sprint Board
- Current Sprint Sheet
- Sprint Board
- Sprint Planning Board
- Sprint Planning Sheet
- Task Board Sheet

## The Sort Command

You can use the **Sort** command to arrange the tasks or resources in a different order than they currently appear. When you select this command, a drop-down menu will be displayed. You can choose one of the predefined sort criteria (by **Start Date**, **Finish Date**, **Cost**, **Priority**, or **ID**), or you can specify your own sort criteria.

If you choose to specify your own sort criteria, the **Sort** dialog box will be displayed. You can use the dialog box to specify up to three fields for sorting data. You can specify whether each field should be sorted in ascending or descending order. You can also specify whether you want tasks permanently renumbered and whether you want to keep the outline structure.



**Figure 2–2:** The Sort dialog box enables you to customize how a table is sorted.

Selecting **Sort** sets the sort parameters you changed and closes the dialog box. **Cancel** closes the dialog box without setting the sort parameters you changed. **Reset** returns the sort parameters to their default state.

	<p><b>Note:</b> You can also sort views by selecting the drop-down arrow adjacent to a column header in the view. You can choose to sort the column in ascending or descending order.</p>
	<p><b>Note:</b> To learn more about customizing views, check out the Spotlight on <b>Customizing Views</b> presentation from the <b>Spotlight</b> tile on the CHOICE Course screen.</p>

## The Outline Command

You can use the **Outline** command to specify how much detail about the project is shown. This is helpful when your project has summary tasks and subtasks (perhaps several levels for complex projects). When you select this command, Project displays a drop-down menu:

- Selecting the **Show Subtasks** option displays all the subtasks under the currently selected task.
- Selecting the **Hide Subtasks** option hides all the subtasks under the currently selected task.
- Selecting the **All Subtasks** option displays all of the subtasks in the entire project.
- Selecting the **Level 1** through **Level 9** options displays tasks at the selected level of indentation.

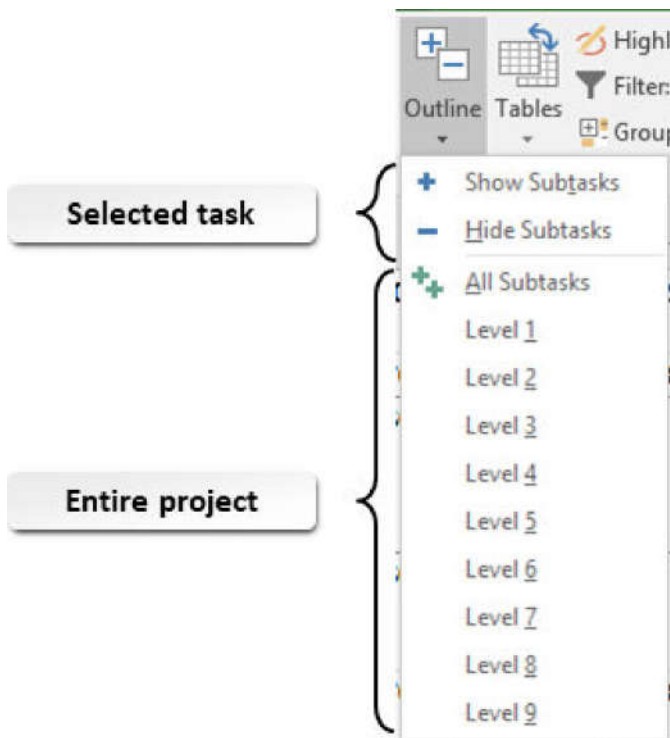


Figure 2-3: Use the Outline button to hide or show levels of tasks.

## The Tables Command

You can use the **Tables** command to display different sets of fields in the current view. When you select this command, Project displays a drop-down menu of available tables.

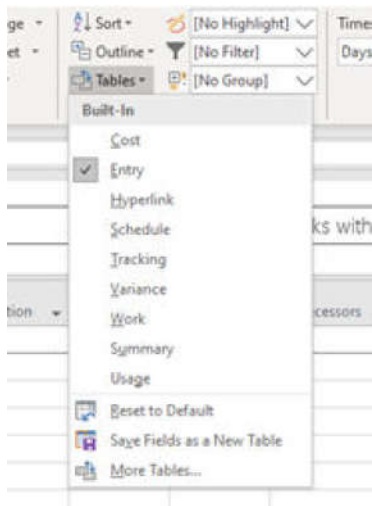


Figure 2-4: The Tables command enables you to switch tables in a view.

The **Entry** table is the default configuration for many views. There are several other built-in tables you can choose from this menu, or you can see additional tables by selecting the **More Tables** option. The following table explains the use of each of the other primary built-in tables.

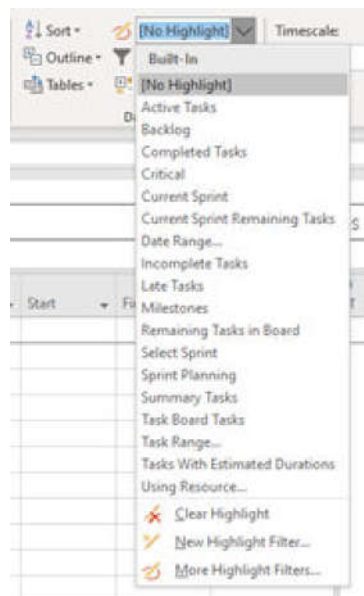
<b>Table</b>	<b>Use to View</b>
<b>Cost</b>	Cost information about project tasks—including baseline, actual, and variance.
<b>Hyperlink</b>	Links to additional task information on a computer, network, or web page.
<b>Schedule</b>	Schedule information about project tasks—including start dates, finish dates, free slack, and total slack.
<b>Tracking</b>	Actual task information rather than planned task information.
<b>Variance</b>	The difference between baseline and actual dates.
<b>Work</b>	The difference between baseline and actual work, as well as work remaining.
<b>Summary</b>	Basic project information—including task duration, start and finish dates, percent completed, cost, and work.
<b>Usage</b>	Task work, duration, and start and finish dates.

Tables are not just for viewing project information. You can also use tables to edit existing information or add new information.

You can customize the selected table for your needs (for example, by adding and hiding columns). You can also use the **Tables** menu to reset a customized table to its default configuration or save it as a new table.

## The Highlight Command

You can use the **Highlight** command to focus on items in the current view that meet specific criteria. When you select this command, Project displays a drop-down menu of highlight criteria.

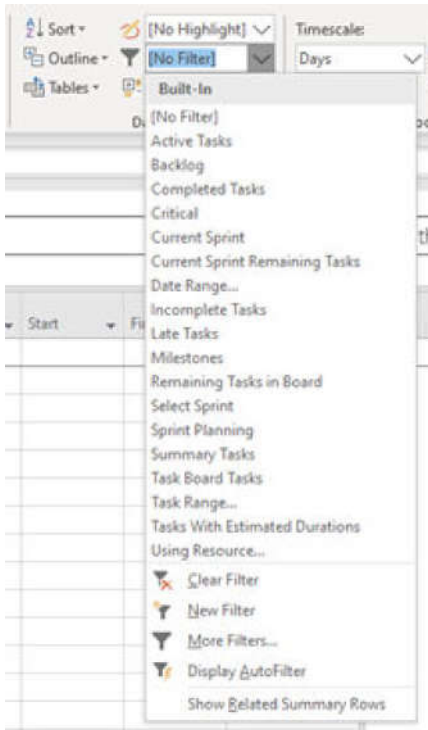


**Figure 2–5:** Highlighting fields based on criteria enables you to quickly identify areas of concern.

There are several built-in highlight criteria you can choose from this menu, or you can choose other criteria by selecting the **More Highlight Filters** option. Selecting the **Clear Highlight** option will remove highlighting from the current view. If you select the **New Highlight Filter** option, you can create a custom highlight filter.

## The Filter Command

You can use the **Filter** command to show only items in the current view that meet specific criteria. When you select this command, Project displays a drop-down of filter criteria.



**Figure 2-6:** Filtering enables you to customize which items are shown in a view.

There are several built-in filter criteria you can choose from this menu, or you can choose other criteria by selecting the **More Filters** option. Selecting the **[No Filter]** option will remove filtering from the current view. If you select the **New Filter** option, you can create a custom filter. Selecting the **Display AutoFilter** option toggles off and on the ability to apply sorting, filtering, and grouping by selecting the drop-down arrow adjacent to a column header in the view. Selecting the **Show Related Summary Rows** option toggles off and on the display of summary tasks containing subtasks that meet the filtering criteria.



**Note:** If **Display AutoFilter** is toggled on, you can also filter views by selecting the drop-down arrow adjacent to a column header in the view.

## Custom Filters

A custom filter is one that is not in Project's list of built-in filters. You can create a custom filter by selecting **New Filter** in the **Filter** command, then defining the filter with an appropriate **Name**. The **Field Name** area is used to select which field to filter on, the **Test** area defines what the filter is to do, and the **Value(s)** area contains the criterion. You can add more fields beneath the first one, to filter on multiple criteria. After you save the filter, it will appear in the **Custom** area at the top of the **Filter** command.



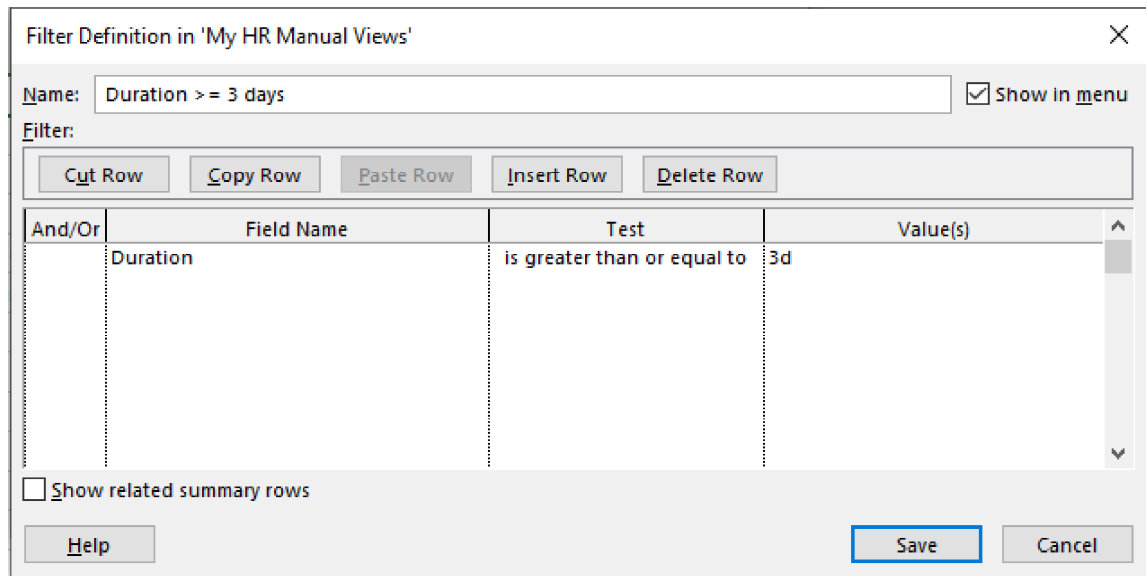


Figure 2-7: The Custom Filter dialog box lets you create a custom filter.

Only those rows that contain the sought-after information will appear. To remove the filter, select [No Filter] from the Filter command.

## Interactive Filters

An interactive filter is one that asks you what you want to filter on. You create the filter similar to the way you create a custom filter, except that the Test area has **contains** from the list of choices, and the Value(s) area has a question in quotation marks.

For example, if you want to see only those task names that contain a particular word, you would enter *Task name* in the Field name area, *contains* in the Test area, and *"What do you want to filter on?"* with a second question mark outside of the quotation marks in the Value(s) area. After you save the filter, it will appear in the Custom area at the top of the Filter command.

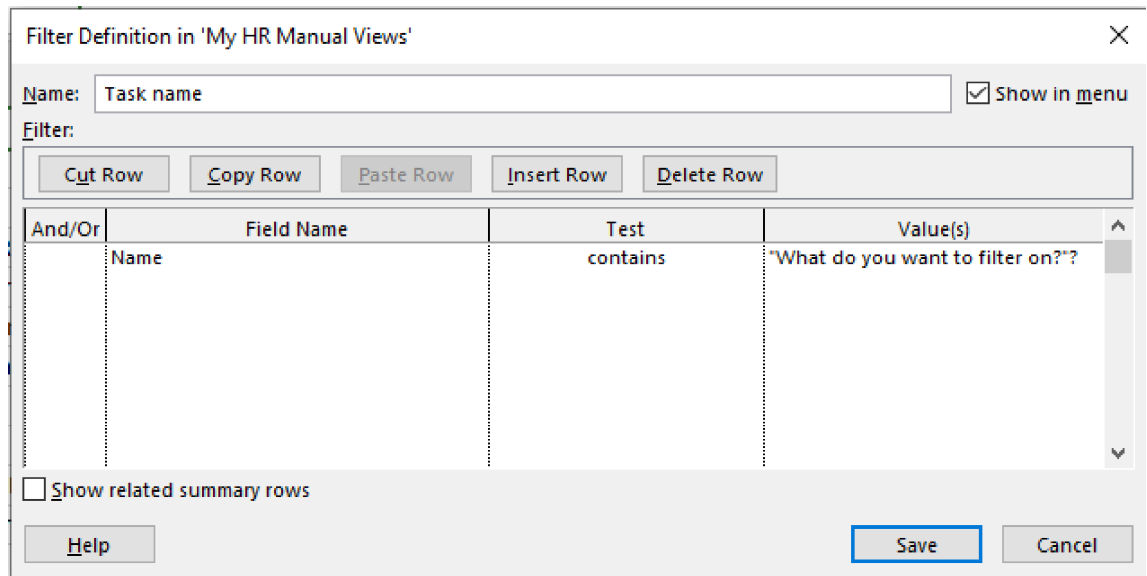
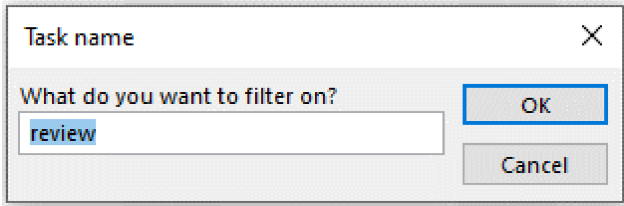


Figure 2-8: An interactive filter asks you a question about what you want to filter on.

To use the filter, you select the name of the filter from the top of the **Filter** command, and enter the information you want to filter on in the **Search** box. For example if you want to see only the tasks that contain **review** in the name, you would enter that in the **Search** box and select **OK**.

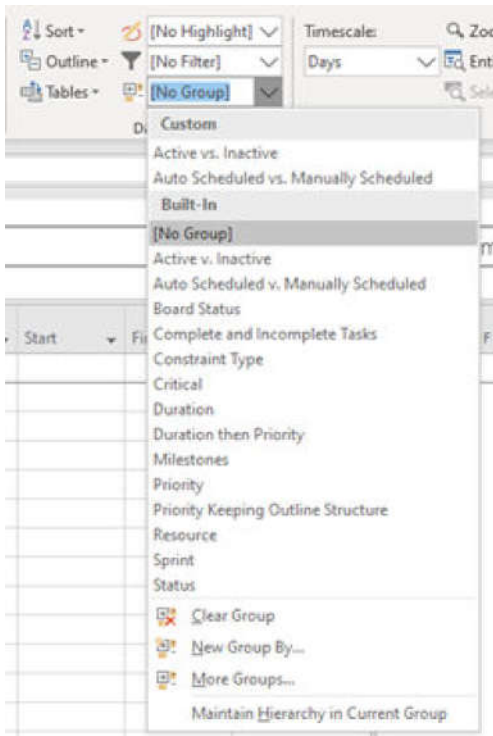


**Figure 2-9:** Enter the word to filter on in the search box.

Only those rows that contain the sought-after information will appear. To remove the filter, select **[No Filter]** from the **Filter** command.

## The Group Command

You can use the **Group** command to group like items together in the current view based on criteria. When you select this command, Project displays a drop-down list of criteria.



**Figure 2-10:** Group criteria give you different ways to summarize like items.

There are several built-in group criteria you can choose from this menu, or you can choose other criteria by selecting **More Groups**. Selecting **Clear Group** removes grouping from the current view. If you select **New Group By**, you can create a custom grouping.

## The Project Statistics Dialog Box

The **Project Statistics** dialog box presents several important statistics on the current state of a project. It is organized around dates, duration, work, and cost. It also shows the project's

completion status with reference to duration and work. It is found by selecting the **Statistics** button in the **Project Information** dialog box, on the **Project** tab on the ribbon.

	Start	Finish
Current	Mon 8/3/20	Wed 10/14/20
Baseline	Mon 8/3/20	Tue 10/6/20
Actual	Mon 8/3/20	NA
Variance	0d	6d

	Duration	Work	Cost
Current	51.33d	756h	\$47,372.81
Baseline	45.33d	752h	\$47,091.23
Actual	36.22d	512h	\$30,378.46
Remaining	15.11d	244h	\$16,994.35

Percent complete:  
 Duration: 71%      Work: 68%

Close

*Figure 2–11: Use Project Statistics to see relevant statistics about your project.*

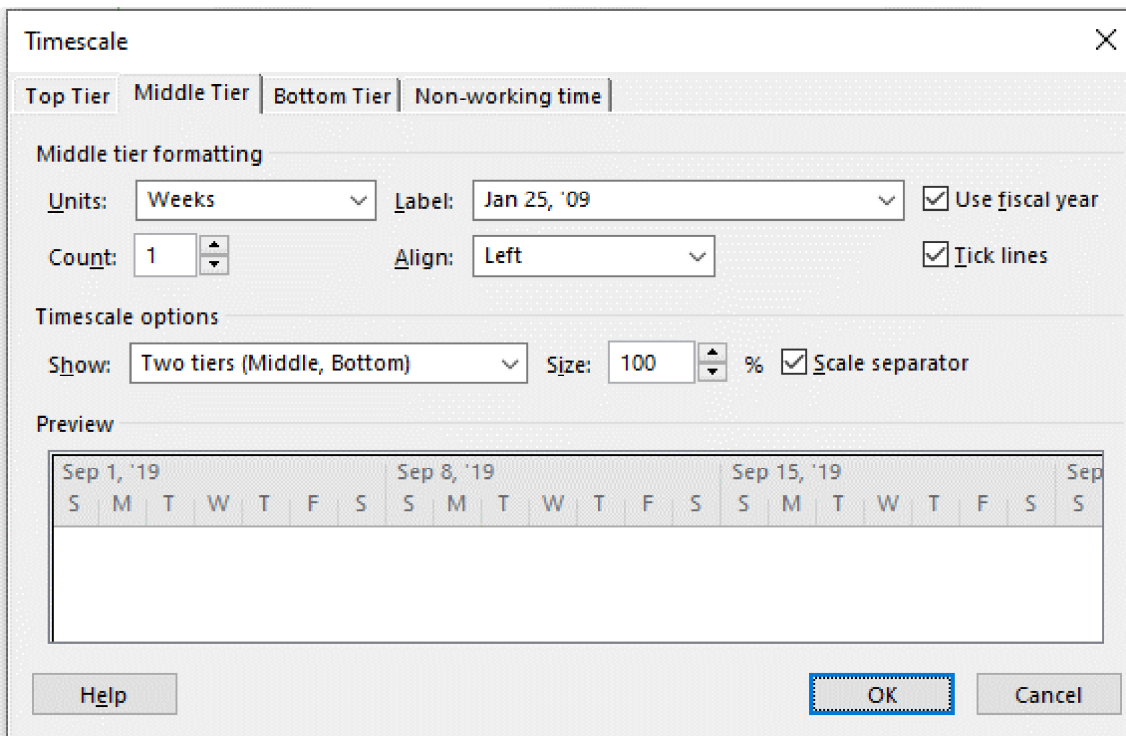
## Add Project Statistics to the Quick Access Toolbar

You can add the **Project Statistics** dialog box to the **Quick Access Toolbar**. To do this, select the **Customize Quick Access Toolbar** drop-down arrow, then select **More Commands**. In the left pane, select **All Commands**, then scroll to and select **Project Statistics**. Select the **Add** button, and the tool will be added to the **Quick Access Toolbar**. Then select **OK**.

## The Timescale Dialog Box

The **Timescale** dialog box enables you to customize your project view by formatting the timescale to suit your preferences. When you customize the timescale, you change the increments of time that are displayed. The timescale can represent time from minutes to years. There are three tiers in the timescale: **Top Tier**, **Middle Tier**, and **Bottom Tier**. By default, the timescale displays two tiers, but you can choose to display **One tier (Middle)**, **Two tiers (Middle, Bottom)**, or **Three tiers (Top, Middle, Bottom)**.

By default, only the middle and bottom tiers are active, with the middle tier showing the date at the start of each week, and the bottom tier showing the days of the week. You can change these increments by using the **Timescale** dialog box. You can also change the labels and the alignment for the timescale.



**Figure 2-12:** The Timescale dialog box enables you to format the time periods for time-based views.



Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Use Different Views.

# ACTIVITY 2-1

## Using View Commands

### Data File

C:\091099Data\Viewing Project Progress\HR Manual Views.mpp

### Before You Begin

Microsoft Project is installed on your computer.

### Scenario


You have now been executing the project for several weeks and recording task progress. As a project manager, you would like to filter the tasks to show only those that are on the critical path. You would also like to group the tasks by resource so that you can easily identify which tasks a resource is working on when you communicate with them to gather status. You decide to use the view commands to make these changes.

1. Open the **HR Manual Views.mpp** project plan file.
  - a) Select **File**→**Open**, then select **Browse**.
  - b) Navigate to the **C:\091099Data\Viewing Project Progress** folder containing your class files.
  - c) Select **HR Manual Views.mpp** and select **Open**.
2. Review the statistics for the project.
  - a) On the **Project** tab, select **Project Information**→**Statistics**.
  - b) Note that the project is scheduled to finish six days late. Work is approximately on target (756 hours compared to the baseline of 752 hours), and the projected cost is about \$280 over the baseline.


	Start	Finish	
Current	Mon 8/3/20	Wed 10/14/20	
Baseline	Mon 8/3/20	Tue 10/6/20	
Actual	Mon 8/3/20	NA	
Variance	0d	6d	
	Duration	Work	Cost
Current	51.33d	756h	\$47,372.81
Baseline	45.33d	752h	\$47,091.23
Actual	36.22d	512h	\$30,378.46
Remaining	15.11d	244h	\$16,994.35
Percent complete:			
Duration: 71%		Work: 68%	

- c) Select **Close**.
3. Make sure you are viewing the Gantt chart.

#### 4. Use the **Filter** command to see only the tasks on the critical path.

- a) Select **View→Filter**. 
- b) From the filter drop-down list, select the **Critical** option.  
Notice that only some of the tasks are shown; these are the ones on the critical path. You may need to scroll the **Timeline** portion of the view to the right to see the Gantt bars for these tasks.
- c) To clear the filter, select the drop-down arrow in the filter button and from the drop-down list, select **Clear Filter**.

#### 5. Use the **Group** command to group tasks by resource name.

- a) Select **View→Group**. 
- b) From the **Group** drop-down list, select **Resource**.  
Notice that the tasks in the Gantt chart are now grouped by the resources assigned to the tasks.
- c) On the **Quick Access Toolbar**, select the **Undo** button to return the Gantt chart to its previous (ungrouped) state.

#### 6. Save your changes as *My HR Manual Views.mpp*

- a) Select **File→Save As**, then select **Browse**.
  - b) Navigate to **C:\091099Data\Viewing Project Progress**.
  - c) In the **File name** field, enter *My HR Manual Views* and then select **Save**. Leave the file open.
-