

TOPIC C

Create Custom Views

Even though Project 2016 provides you with 27 built-in views, you may need to build your own to show the information you want about your project. In this topic, you will create custom views.

New Views

Project provides several views, but you can also create your own custom views, which you can quickly access from the **View** bar or a view button. For example, when looking at tasks in **Network Diagram** view, you might want to see resource names and the percent complete in the nodes; these two data points are not part of the default **Network Diagram** view, but you can add them to a custom view. You can also create combination views for when you want to see information from two views simultaneously. You can begin to create a new view by selecting **New** in the **More Views** dialog box.

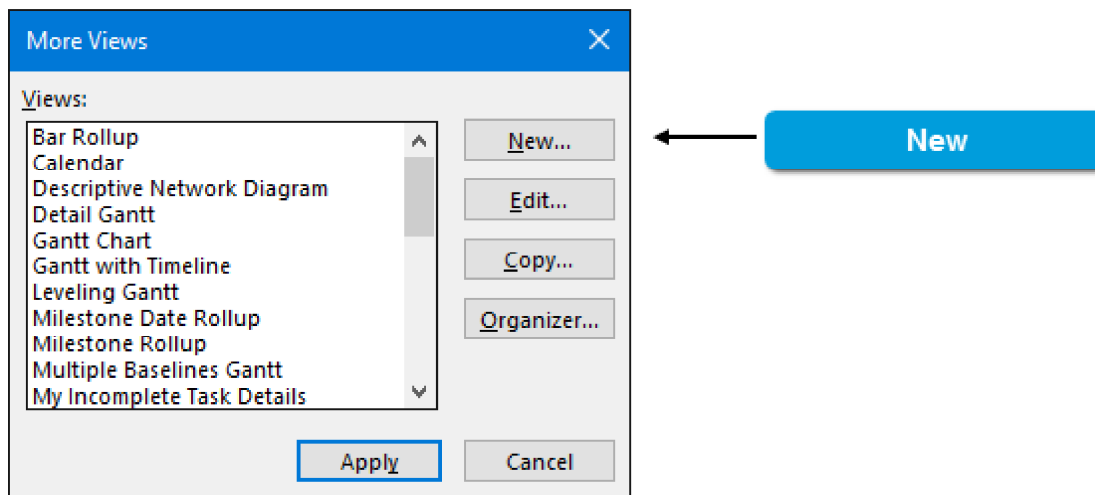


Figure 2-14: Use the **New** button in the **More Views** dialog box to create a new view.

The Define New View Dialog Box

The **Define New View** dialog box will be displayed. You have the option of creating a **Single view** or a **Combination view**.

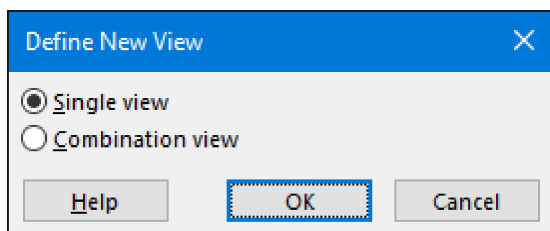


Figure 2-15: **Define New View** dialog box.

Select **Single view** if you only want to see project information in a single pane. Select **Combination view** if you want to see overall project information in one pane and details about selected items in another pane.

Single View

If you select **Single view**, a **View Definition** dialog box will be displayed.

Figure 2–16: View Definition dialog box for a new single view.

Use the **View Definition** dialog box to configure the view:

- Specify a **Name** for the new view.
- Select a **Screen** (a previously existing view) upon which the new view will be based.
- Select a **Table** that will be applied to the new view.
- Select a **Group** that will be applied to the new view.
- Select a **Filter** that will be applied to the new view.
- Choose whether to add highlighting for the filter in the new view.
- Choose whether to show the new view in the menu.



Note: The **Screen** you choose as the basis for your new view may constrain your choices in the **Table**, **Group**, and **Filter** fields. You may need to make a selection in each field to close the dialog box, or you may not be able to make selections in some fields.

Combination View

While managing and tracking a project, you might want to view different aspects of it at the same time. For example, you might want to view the **Gantt** view and the **Task Details** form simultaneously. You can do this by creating a combination view. A combination view is a custom split-pane view. If you select **Combination view**, a different **View Definition** dialog box will be displayed.

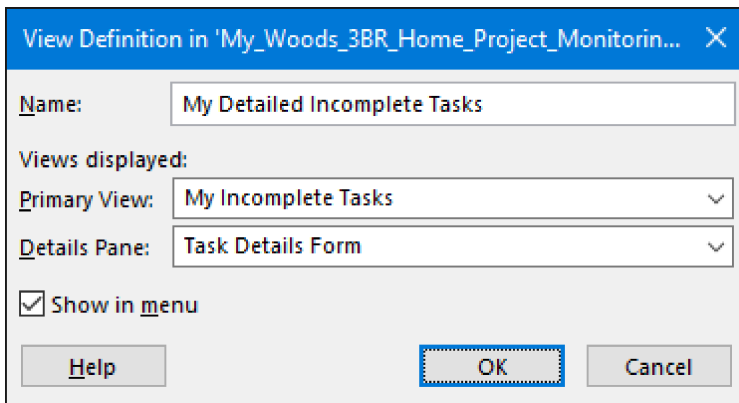


Figure 2-17: Create a new combination view to add the details pane to a view.

In this **View Definition** dialog box, you have different options to configure the view:

- Specify a **Name** for the new view.
- Select a **Primary View** to include in the main pane of the new view.
- Select a second view to include in the **Details Pane** of the new view.
- Choose whether to show the new view in the menu.

The Edit Button

In many cases, you may find that editing a built-in view is more efficient than creating a new view. You can edit a built-in view (or a custom view) by selecting **Edit** in the **More Views** dialog box.

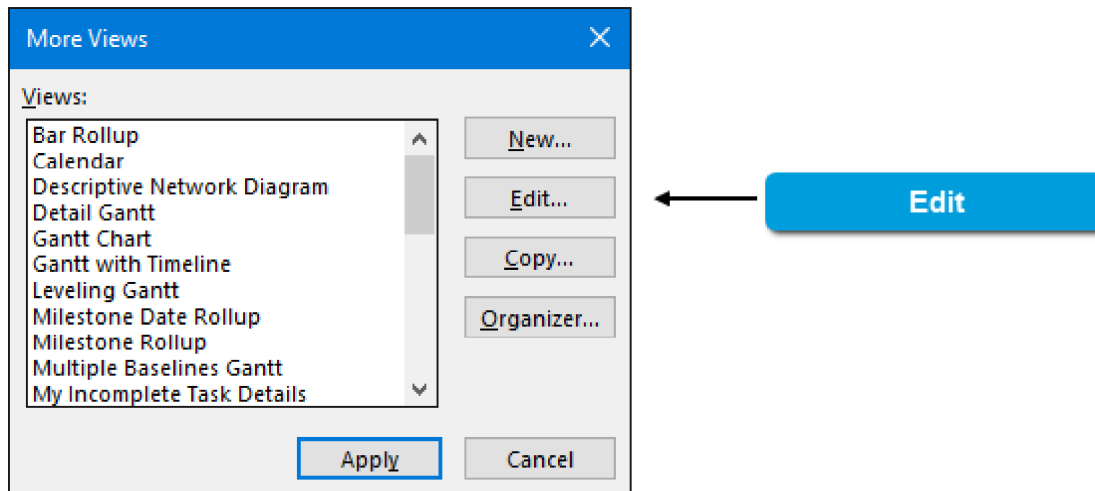


Figure 2-18: Edit button in the More Views dialog box.

Selecting **Edit** will open a **View Definition** dialog box similar to one for new views.

The Copy Button

If you want to edit a built-in view, it's a good idea to make a copy of it first so that the original view is unchanged. You can copy a built-in view (or a new view) by selecting **Copy** in the **More Views** dialog box.

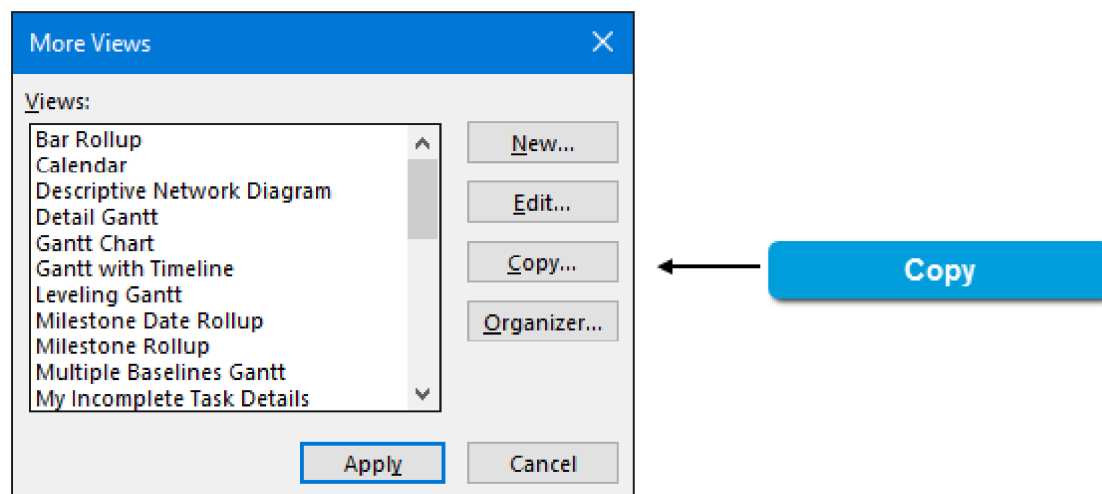



Figure 2–19: Copy button in the More Views dialog box.

Selecting **Copy** will open a **View Definition** dialog box similar to one for new views.

	<p>Note: To further explore customizing Project 2016 views, you can access the LearnTO Customize Views presentation from the LearnTO tile on the CHOICE Course screen.</p>
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The Global Template

The **Global template** is a collection of default settings, such as views, tables, macros, and custom fields, that are available to all projects on your system. These settings exist within a special project on your computer (Global.MPT) and are used in all of your projects. You can modify the settings used in the Global template to provide new and updated project standards across your projects.

The Organizer

The **Organizer** is a tool you can use to copy reports, calendars, and other elements to other projects, or to the Global template (Global.MPT). Copying an element to the Global template makes it available to all your projects. However, you may not need to use the Organizer to accomplish what you want. In fact, Project's default behavior is to automatically copy all new views and related elements you create to the Global template. If you have unchecked the setting and want to copy selected elements to the Global template, or if you want to copy an element from one project to another, you'll need to use the Organizer. The Organizer can also copy custom text styles to other projects or to the Global template.

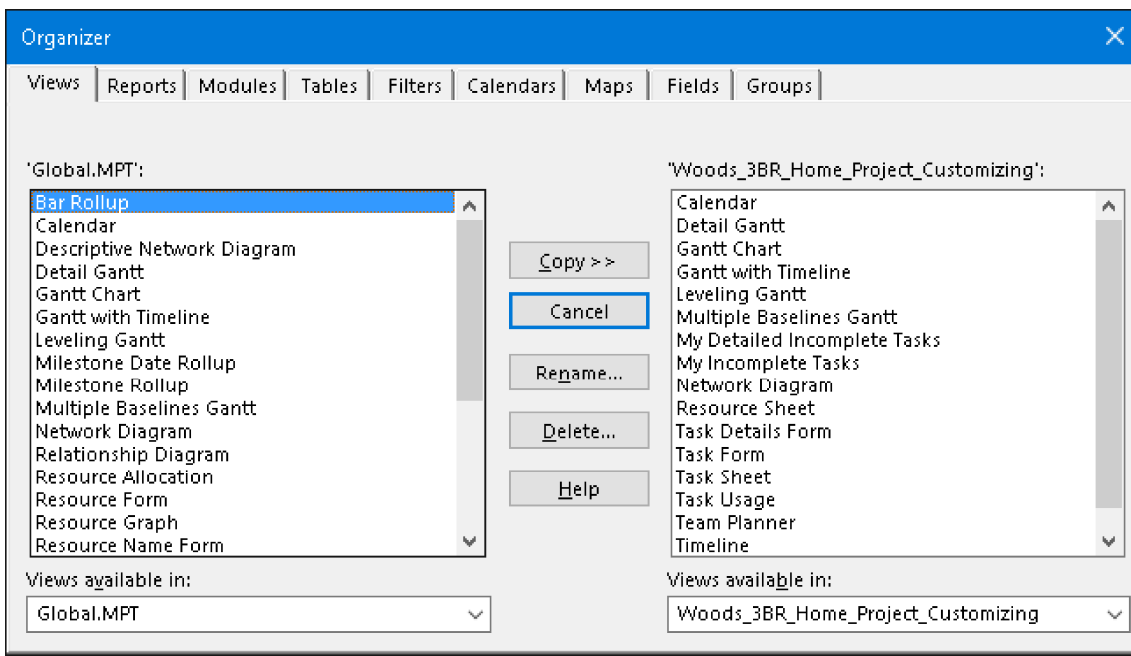


Figure 2–20: Use the Organizer to copy custom elements to the Global template or between project files.



Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Create a Custom View.

ACTIVITY 2–3

Creating Custom Views

Before You Begin

The file **C:\091063Data\Monitoring Project Progress\My_Woods_3BR_Home_Project_Monitoring.mpp** is open.

Scenario

It is now six months into implementation of the construction project. Overall, the project is on schedule and within budget. About a third of the tasks have been completed. You would like to see a list of pending tasks without the completed tasks. You would also like to see the same view with the details for a single selected task so that you can quickly make updates if needed. You decide to create a new single view and a new combination view.

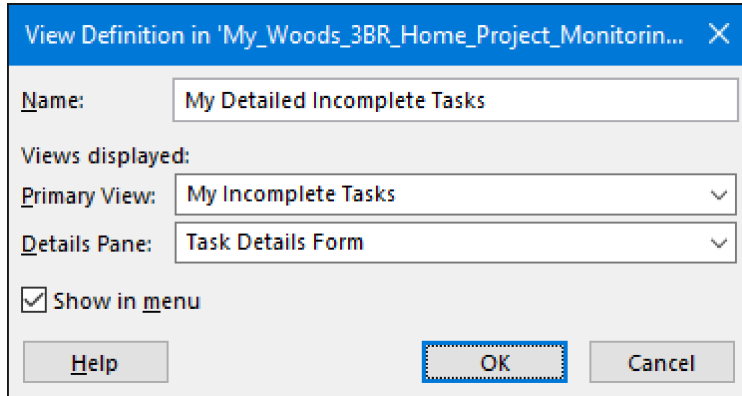
1. Create a new single view.

- Scroll down to the bottom of the **View Bar**.
- Select the **More Views** button.
- In the **More Views** dialog box, select **New**.
- In the **Define New View** dialog box, select **Single view** and select **OK**.
- In the **View Definition** dialog box, in the **Name** field, type **My Incomplete Tasks**.
- In the **Screen** field, verify that **Gantt Chart** is selected from the drop-down list.
- In the **Table** field, from the drop-down list, select **Entry**.
- In the **Group** field, from the drop-down list, select **No Group**.
- In the **Filter** field, from the drop-down list, select **Incomplete Tasks**.
- Verify that the **Highlight filter** check box is unchecked.
- Verify that the **Show in menu** check box is checked.

- Select **OK** to close the **View Definition** dialog box.
- Select **Apply** to close the **More Views** dialog box.
Notice that your new view is displayed, showing only uncompleted tasks.

2. Create a new combination view.

- a) Scroll down to the bottom of the **View Bar**.
- b) Select the **More Views** button.
- c) In the **More Views** dialog box, select **New**.
- d) In the **Define New View** dialog box, select **Combination view** and select **OK**.
- e) In the **View Definition** dialog box, in the **Name** field, type *My Detailed Incomplete Tasks*
- f) In the **Primary View** field, from the drop-down list, select **My Incomplete Tasks**.
- g) In the **Details Pane** field, from the drop-down list, select **Task Details Form**.
- h) Verify that the **Show in menu** check box is checked.



- i) Select **OK** to close the **View Definition** dialog box.
- j) Ensure that the **My Detailed Incomplete Tasks** view is selected, and then select **Apply** to apply the view and close the **More Views** dialog box.
- k) Notice that your new view is displayed, showing only incomplete tasks. Also notice that, when you select a task in the top pane, its details appear in the bottom pane.

3. Save the file.
