TOPIC D

Format and Share the Timeline View

Project includes a very useful tool—the **Timeline** view—that allows you to see your project's "big picture" and easily share it with your stakeholders. The **Timeline** view allows you to take a snapshot of key tasks and milestones, which you can then paste into other Microsoft® Office programs.

The Timeline View

You may already be familiar with the **Timeline** view as a component of the Project interface. By default, whenever you create a new Project file, the **Timeline** view will be visible as a secondary, horizontal pane below the ribbon. You can make the **Timeline** smaller or larger by sliding the divider bar at the bottom of the **Timeline** pane up or down. You can even completely hide the **Timeline** by sliding the divider bar all the way up.

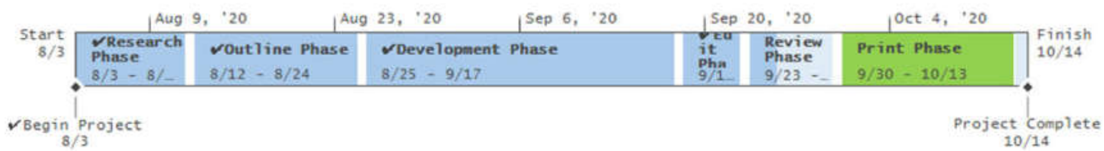

Figure 2-24: You can control which tasks appear in the Timeline view.

	Note: If the Timeline is hidden, you can unhide it by selecting the **View** tab and checking the **Timeline** check box.

You can control which tasks are displayed on the **Timeline** by checking and unchecking the **Display on Timeline** field in the **Task Information** dialog box. Generally speaking, you should show high-level summary tasks on the **Timeline**. However, there may be circumstances when you want to show important, lower-level tasks.

	Note: Project supports multiple timelines so that you can format them for different purposes, such as a milestone and summary view.

The Timeline Tools Format Contextual Tab

Whenever you select a pane containing the **Timeline** view, Project will display the **Timeline Tools Format** contextual tab on the ribbon. These controls enable you to change how the **Timeline** displays.

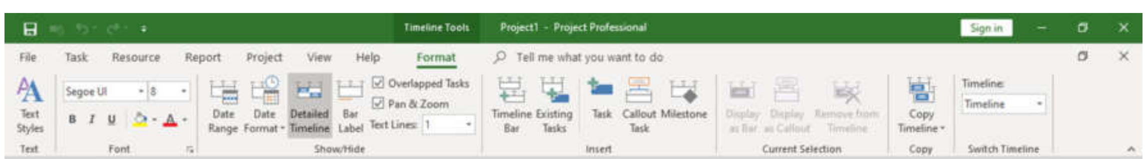

Figure 2-25: Modify the Timeline view with the commands on the Timeline Tools Format contextual tab.

Here is a table of the commands on this tab and what they do.

Command	*Description*
Text Styles	Changes the font, size, color, and other attributes of all text on the **Timeline**.
Font Command Group	Changes the font, size, color, and other attributes of selected text on the **Timeline**.
Date Range	Shows only a specific range of dates.
Date Format	Changes how dates are displayed and which dates are displayed on the **Timeline**.
Detailed Timeline	Changes how much detail is displayed on the **Timeline**. This command is only active when the **Timeline** is visible as a secondary pane below the ribbon. If the command is toggled off, most of the text will be hidden on the **Timeline** and the **Timeline** height will be shorter. If the command is toggled on, more text will be shown on the **Timeline** and the **Timeline** height will be taller.
Bar Label	Shows the name of each **Timeline** bar.
Overlapped Tasks	Changes how tasks that overlap chronologically are displayed on the **Timeline**. If this field is checked, overlapping tasks are displayed on different rows. If this field is unchecked, overlapping tasks are displayed on the same row.
Pan & Zoom	Changes whether **Pan & Zoom** is active. If this field is checked, you can pan and zoom to navigate the **Timeline** view.
Text Lines	Changes the height of task bars in the **Timeline**. The minimum is 1 (shortest) and the maximum is 10 (tallest).
Timeline Bar	Adds another **Timeline** bar.
Existing Tasks	Changes which tasks are displayed on the **Timeline**. If you select this button, Project will open the **Add Tasks to Timeline** dialog box, which shows all the project tasks in a dynamic outline. You can check tasks you want to be visible on the **Timeline** and uncheck those you do not want to be visible on the **Timeline**.
Task	Adds a new task to the **Timeline** as a bar chart. (This new task is also added to the project's task list.) If you select this button, Project 2016 will open the **Task Information** dialog box.
Callout Task	Adds a new task to the **Timeline** as a callout. (This new task is also added to the project's task list.) This command is only active when the **Timeline** is visible as the primary pane. If you select this button, Project 2016 will open the **Task Information** dialog box.
Milestone	Adds a new milestone task to the **Timeline**. (This new milestone is also added to the project's task list.) This command is only active when the **Timeline** is visible as the primary pane. If you select this button, Project 2016 will open the **Task Information** dialog box.
Display as Bar	Changes whether a selected task on the **Timeline** is displayed as a bar. You must select a task before this command is active. If the selected task is not displayed as a bar, it will be displayed as a callout.
Display as Callout	Changes whether a selected task on the **Timeline** is displayed as a callout. You must select a task before this command is active. If the selected task is not displayed as a callout, it will be displayed as a bar.
Remove from Timeline	Removes the selected task from the **Timeline**. You must select a task before this command is active. Removing a task from the **Timeline** does not delete the task from the project.
Copy Timeline	Provides various options for you to copy the **Timeline**.

Command	*Description*
Switch Timeline	Switches to another **Timeline** view.

The Copy Timeline Command

Whenever you select the **Copy Timeline** command on the **Timeline Tools Format** contextual tab, Project gives you three options for copying the **Timeline**.

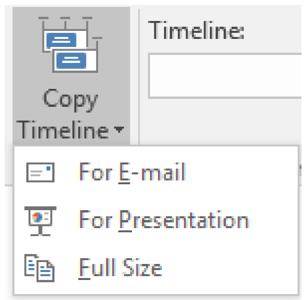

Figure 2–26: Copy Timeline options.

Here is a table of the options and how to use them.

Option	*Use*
For E-mail	Copies the **Timeline** to the Windows® clipboard so that you can paste it into the body of an Outlook® email message. The pasted image will be relatively small in both visual and data size. The pasted image may not look exactly like the copied **Timeline**.
For Presentation	Copies the **Timeline** to the Windows clipboard so that you can paste it into a PowerPoint® slide. The pasted image will be larger in both visual and data size. Again, the pasted image may not look exactly like the copied **Timeline**.
Full Size	Copies the **Timeline** to the Windows clipboard at its current zoom level—be it large, medium, or small. You can paste it into any Office document. You may find this option especially useful for Word, Publisher®, or Visio® documents you plan to print. The visual and data size of the pasted image depends on the zoom level of the copied **Timeline**. The pasted image will look exactly like the copied **Timeline**.

Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Format and Share the Timeline View.

ACTIVITY 2-4

Formatting and Sharing the Timeline View

Before You Begin

The **My HR Manual Views.mpp** project plan file is open.

Scenario

The monthly HR Manual project team meeting will take place next Monday. During the meeting, you plan to give a presentation on the status of the project. For the presentation, you want to put the project timeline into a PowerPoint slide.

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1. Display the **Timeline** view if it is not visible at the top of the Gantt chart.
   a) Select **View→Timeline Check Box** and check the box.
   b) Verify that the **Timeline** without any tasks on it is shown.

2. Add tasks to the **Timeline**.
   a) Right-click Task 2 **Research Phase** and select **Add to Timeline** from the menu.
   b) Ctrl-click all of the other top-level summary tasks and select **Add to Timeline** from the menu.
   c) Right-click Task 8 **Publication Phase** and select **Add to Timeline** from the menu.

3. Display a task as a callout on the **Timeline.**
   a) Right-click Task 3.1 **Create Outline**, and select **Add to Timeline** from the menu.
   b) On the **Timeline**, select **Create Outline**.
   c) On the **Timeline Tools Format** contextual tab, select **Current Selection→Display as Callout**.
   d) Reposition the callout by selecting its border, and dragging it slightly to the left.

4. Add the milestones to the **Timeline**.
   a) Ctrl-click Task 1 **Begin Project** and Task 9 **Project Complete**.
   b) Right-click Task 9 **Project Complete** and select **Add to Timeline** from the menu.

5. Format the **Timeline** font.
   a) In the upper pane, select the **Timeline** view pane.
   b) On the **Timeline Tools Format** contextual tab, select the **Text Styles** button.
   c) In the **Text Styles** dialog box, change the font for all the **Timeline** text from **Segoe UI** to **Lucida Console**.
   d) Change the font size for all the **Timeline** text from **8** to **9**. Select **OK** to close the dialog box.
   The font type and size has changed in the entire **Timeline** view pane.
   e) Select the **Text Lines** field. Change the number from **1** to *2*
   The task rows are taller.
   f) In the **Timeline** view pane, select the **Print Phase** bar. In the **Font** group, select the **Background Color** button and choose a bright color for the task.
   The bar changes to the selected color.

6. Format the **Timeline** date.
   a) On the **Timeline Tools Format** tab, select the **Date Format** button. From the drop-down menu, change the **Format** from **Default** to **1/28**.
   b) Verify that the month and day (but not the year) for each task are displayed on the **Timeline**.

7. Copy the **Timeline** from Project and paste it into PowerPoint.
   a) Select the **Copy Timeline** button. From the drop-down, select the **For Presentation** option.
   b) From the Windows 10 **Start** menu, open Microsoft PowerPoint.
   c) Select **Blank Presentation**.
   d) On the first slide, select **Click to add title** and type ***Human Resources Manual***
   e) Also on the first slide, select **Click to add subtitle** and add ***Monthly Project Team Meeting***
   f) On the ribbon, on the **Home** tab, select the **New Slide** button.
   g) On the new slide, select **Click to add title** and type ***Timeline***
   h) Also on the new slide, select the **Click to add text** content box. Select the body area of the slide, then select the arrow under the **Paste** button on the ribbon, and from the drop-down, select the **Picture** option.
   An image of the **Timeline** has been added to the slide.

8. Save the PowerPoint presentation.
   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 Presentation*** and then select **Save**.

9. Exit PowerPoint.

10. Save and close the project file.

Summary

In this lesson, you used the various views and tables available in Project, and explored how to customize those views for your needs.

What types of custom fields might you use in your next project?

Which views are most helpful for monitoring project progress?

Note: Check your CHOICE Course screen for opportunities to interact with your classmates, peers, and the larger CHOICE online community about the topics covered in this course or other topics you are interested in. From the Course screen you can also access available resources for a more continuous learning experience.