PROJECT VIEWS

The main way of displaying your data with Microsoft Project is with *views* and there are really many more options and variations and flavours here than you may first perceive.

Views allow you to juxtapose tasks and resources. For example, you can choose a view that shows tasks, or one that shows resources, another that shows tasks and the resource required for each task, or another that shows resources and the tasks that each is working on.

In this session you will:

- ✓ gain an understanding of project views
- ✓ learn how to work with the standard built-in views in *Microsoft Project*
- ✓ learn how to split the views on the screen
- ✓ learn how to create a custom view
- ✓ learn how to create a custom split view
- ✓ learn how to display custom views
- ✓ learn how to display views on the view menus
- ✓ learn how to save the current settings as a new view
- ✓ learn how to delete unwanted views from a project
- ✓ learn how to keep views local.

UNDERSTANDING PROJECT VIEWS

Whenever you are working in Microsoft Project you are *viewing* your project data. There are different types of *views* – for example you may be viewing *tasks* or *resources*, you may have a full screen view or a split screen view. Options for changing views can be found on the *Task* tab, the *Resource* tab, as well as the totally dedicated *View* tab on the *Ribbon*.

Built-In Project Views

Microsoft Project contains 27 different built-in views for you in its default mode. Seven of these views are available from the *Task Views* and *Resource Views* groupings on the *View* tab, while the full 27 are available from the *More Views* dialog box. Here's a list of the 27 views – the ones marked with a (*Task*) or (*Resource*) are accessible directly from the *View* tab of the *Ribbon*.

Bar Rollup	Multiple Baselines Gantt	Task Details Form
Calendar (*T*)	Network Diagram (*T*)	Task Entry
Descriptive Network Diagram	Relationship Diagram	Task Form
Detail Gantt	Resource Allocation	Task Name Form
Gantt Chart (*T*)	Resource Form	Task Sheet
Gantt with Timeline	Resource Graph	Task Usage (*T*)
Levelling Gantt	Resource Name Form	Team Planner (*R*)
Milestone Date Rollup	Resource Sheet (*R*)	Timeline
Milestone Rollup	Resource Usage (*R*)	Tracking Gantt

Components of a View

Views are presented either in a *tabular* format (similar to a spreadsheet screen) or in a *form* style. These are the macro or big-ticket items that views are comprised of.

There are also micro items that determine how or what data is displayed in the sheets or forms. These are *tables*, *filters*, *groups* and *layouts* (in the case of forms).

Split or Combination Views

Microsoft Project actually allows you to display a full-screen view or a split-screen view. If you are interested only in tasks or resources you would most likely use a full-screen view. However, if you want to work with both tasks and resources at the same time a split-screen view is very useful.

A split-screen view divides the screen horizontally and is easily created using the options in the *Split View* group on the *View* tab. Here you can nominate which view you'd like for the top split (also known as the *primary* view) and which for the bottom (known as the *details* view). When the screen is split a dividing bar that separates the top from the bottom can be dragged up or down to make either view larger or smaller than the other.

Custom Views

There's a lot you can change when viewing your project. Should you find that you hit upon the perfect view, with either a full-screen or split-screen layout, with tables and filters that hit just the right buttons, then you can opt to *save* this view as a *custom view*. The *custom view* will be added to the *More Views* dialog box and can always be accessed again from there saving you the hassle of remembering which macro and micro elements you've used.

Project Templates

Like most other software applications a project file is based upon a *template*. Unless you specify otherwise your project will be created using the *Global* template. Any custom views that you create will be placed in this template so that the custom view can be used with other project files that you develop.

WORKING WITH STANDARD VIEWS

The standard views that are built into Microsoft Project are really quite extensive and allow you to view the tasks and resources that make up your project in many different ways. Most are single screen while some are split screen. These views can be accessed from the *Task*, *Resource*, or *View* tabs on the *Ribbon*. With most of them you'll need to open the *More Views* dialog box.

Try This Yourself:

Before starting this exercise you MUST open the file J415 Views_1.mpp...

1 Click on the *View* tab on the *Ribbon* and click on *Calendar* in the *Task Views* group

2 Click on the next month ▶ and previous month ◀ buttons several times to scroll through the months

3 Click on *Resource Sheet* in *Resource Views* to see the resources used in the project

4 Click on *Other Views* and click on *More Views* to see the *More Views* dialog box

Notice that the current view is selected in the list…

5 Scroll to and click on *Task Sheet* then click on **[Apply]**

6 Click on *Gantt Chart* in *Task Views* to return to this, the most commonly used view
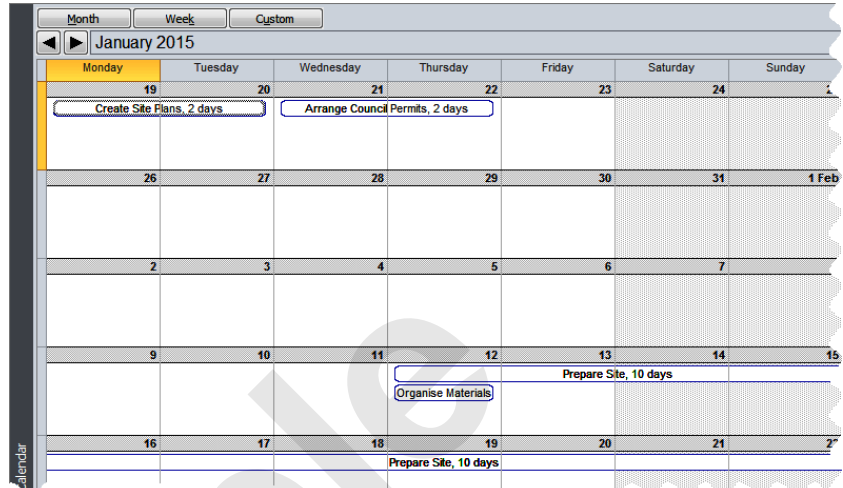
1 *Calendar view shows the tasks of your project as bars overlaid on a calendar.*
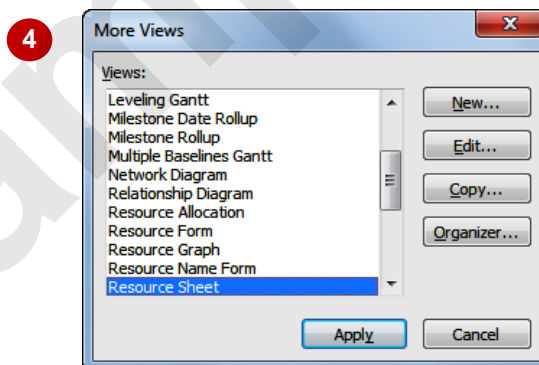
For Your Reference…

To display the standard, built-in views:

1. Click on the *View* tab on the *Ribbon*
2. Click on *Other Views* and click on *More Views*
3. Scroll to and click on the desired view then click on **[Apply]**

Handy to Know…

- We'd strongly suggest that you make the time and give all 27 views in the *More Views* dialog box a good workout. You'll be surprised by the breadth and scope of the view options here.

CREATING SPLIT VIEWS

In Microsoft Project you can *split* your screen so that it shows two views concurrently. When you have two views the screen is split into an upper pane and a lower pane. A dark vertical bar, known as the *selection bar*, appears at the left of the pane that is currently the active pane – the active pane is the one that is changed when you use any of the commands on the *Ribbon*.

Try This Yourself:

Same File — *Continue using the previous file with this exercise, or open the file J415 Views_1.mpp...*

1 Ensure that the *Gantt Chart* view is currently active

2 Click on the *View* tab on the *Ribbon* and click in the *Details* tick box in the *Split View* group

3 Click on the drop arrow next to *Task Form* in the *Split View* group and click on *Resource Sheet* in the lower view

4 Click on *Lay Foundations* to see the resources required for this task

5 Click on *Other Views* in the *Task Views* group (on the *Ribbon*) and click on *Task Sheet* to see a task sheet view in the top pane

6 Right click on the *Resource Sheet* selection pane in the lower split and click on *Resource Usage* to see a resource usage in the lower pane

7 Click on *Details* in the *Split View* group to remove the tick and click on *Gantt Chart* in the *Task Views* group
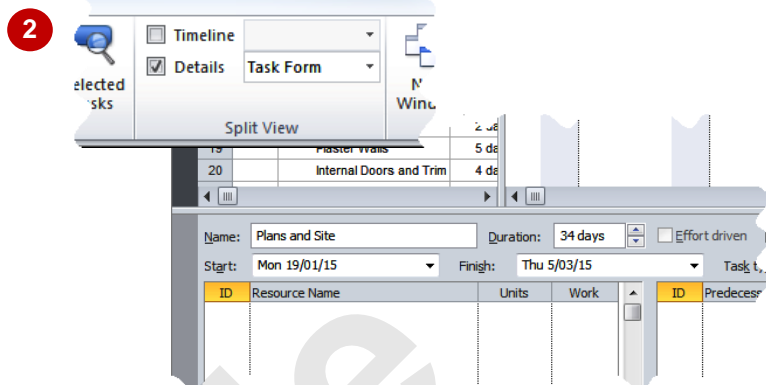
Here the Gantt Chart has remained in the top pane and a Task Form has appeared in the lower pane. The black vertical bar at the left of the Gantt Chart is the selection bar……
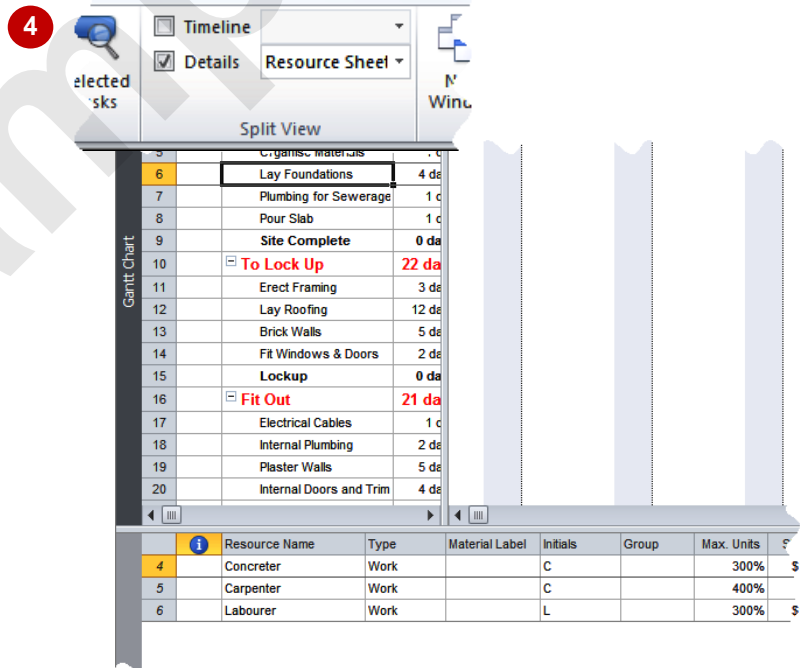
For Your Reference…

To display a split screen:

1. Click in the *Details* tick box in the *Split View* group on the *View* tab
2. Click on the drop arrow to choose the desired view for the lower pane

Handy to Know…

- In split view the options on the *Format* tab on the *Ribbon* work on the view where the selection bar is darkened. The options on the *View* tab work only on the top pane irrespective of which selection bar (i.e. upper or lower) is darkened.

CREATING A CUSTOM VIEW

A *view* is made up of a *screen layout*, a *table*, a *group*, and a *filter*. The existing views in Microsoft Project have all been created with these elements. You can create your own custom views in Microsoft Project by specifying in the *Define New View* dialog box which of these elements you'd like.
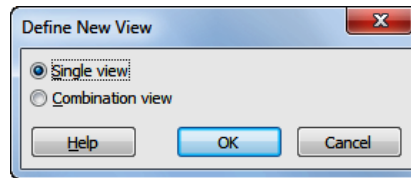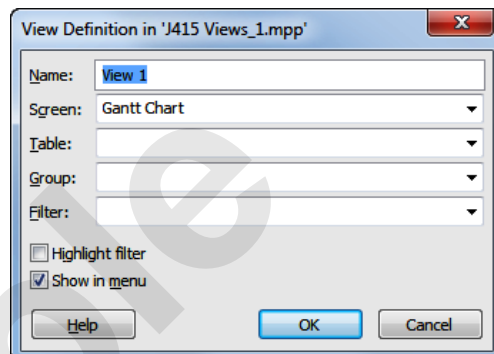

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file J415 Views_1.mpp...

1 Click on the *View* tab on the *Ribbon*, click on *Other Views* and click on *More Views* to see the *More Views* dialog box

2 Click on **[New]** to display the *Define New View* dialog box

3 Click on *Single View* and click on **[OK]** to display the *View Definition* dialog box

4 Type **Cost Gantt** in *Name* and ensure that *Gantt Chart* is selected in *Screen*

5 Click on the drop arrow for *Table* and click on *Cost*, click on the drop arrow for *Group* and click on *No Group*, and click on the drop arrow for *Filter* and click on *All Tasks*

6 Click on **[OK]** to return to the *More Views* dialog box

Notice that the custom view appears in the box…

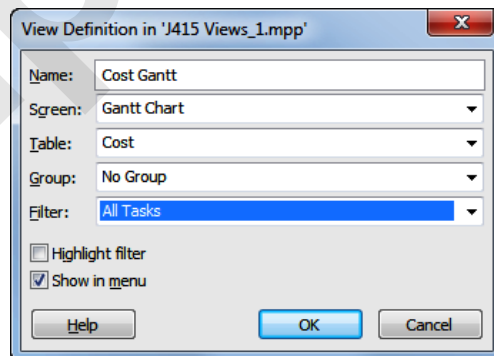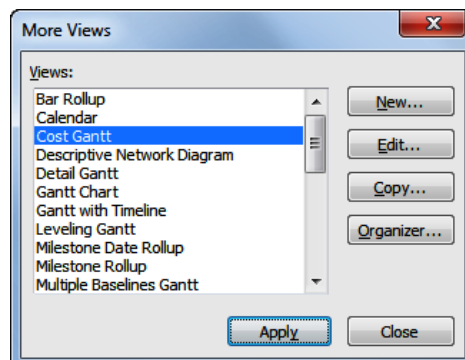**7** Ensure *Cost Gantt* is selected and click on **[Apply]** to see the new view

2

Define New View

○ Single view
○ Combination view

[Help] [OK] [Cancel]

3

View Definition in 'J415 Views_1.mpp'

Name: View 1
Screen: Gantt Chart
Table:
Group:
Filter:

☐ Highlight filter
☑ Show in menu

[Help] [OK] [Cancel]

5

View Definition in 'J415 Views_1.mpp'

Name: Cost Gantt
Screen: Gantt Chart
Table: Cost
Group: No Group
Filter: All Tasks

☐ Highlight filter
☑ Show in menu

[Help] [OK] [Cancel]

6

More Views

Views:
Bar Rollup
Calendar
Cost Gantt
Descriptive Network Diagram
Detail Gantt
Gantt Chart
Gantt with Timeline
Leveling Gantt
Milestone Date Rollup
Milestone Rollup
Multiple Baselines Gantt

[New…]
[Edit…]
[Copy…]
[Organizer…]

[Apply] [Close]

For Your Reference…

To create a *custom view*:

1. Click on the *View* tab, click on *Other Views* and click on *More Views*
2. Click on **[New]**, click on *Single View* and click on **[OK]**
3. Enter the appropriate settings

Handy to Know…

- The title bar of the *View Definition* dialog box indicates in which project file the view is being created. The *Organiser* button in this dialog box allows you to shift this view to other locations.

CREATING A COMBINATION VIEW

Microsoft Project allows you to create both single-screen *custom views* and split-screen *custom views*. When you create a single-screen custom view you can specify which screen, filter, group, and table to use. When you specify a split-screen view you can only select the view screen layout to use in the upper and lower panes.
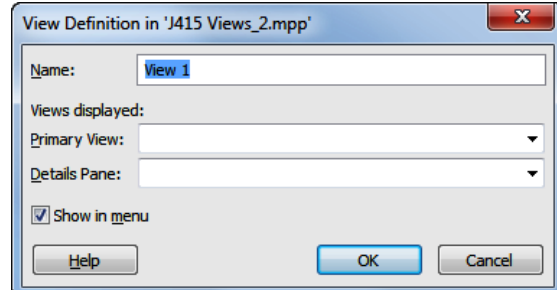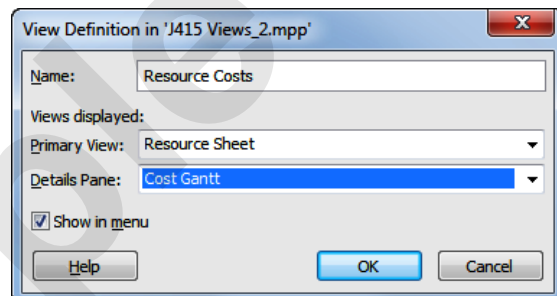
Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file J415 Views_2.mpp...

1 Click on the *View* tab on the *Ribbon*, click on *Other Views* and click on *More Views* to see the *More Views* dialog box

2 Click on **[New]** to display the *Define New View* dialog box, click on *Combination View* and click on **[OK]**

3 Type **Resource Costs** in *Name*

4 Click on the drop arrow ▼ for *Primary View* and click on *Resource Sheet*

5 Click on the drop arrow ▼ for *Details Pane* and click on *Cost Gantt*

6 Click on **[OK]** to return to the *More Views* dialog box, ensure *Resource Costs* is selected and click on **[Apply]**

7 Click on the various resources in the top pane and study their various costs in the *Details* pane at the bottom

When a resource is selected in the top pane all of the tasks and associated task costs for that resource will appear in the bottom pane…

For Your Reference…

To create a custom split view:

1. Click on the *View* tab, click on *Other Views* and click on *More Views*
2. Click on **[New]**, click on *Combination View* and click on **[OK]**
3. Enter the appropriate settings

Handy to Know…

- Once a custom combination view has been created it can also be selected from the *Details* settings in the *Split View* grouping on the *Ribbon*.

USING CUSTOM VIEWS

Once custom views have been created they are ready for use. When a custom view is created, the ***Show in menu*** setting in the ***View Definition*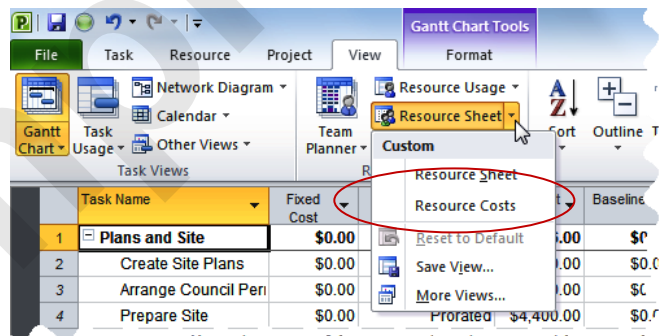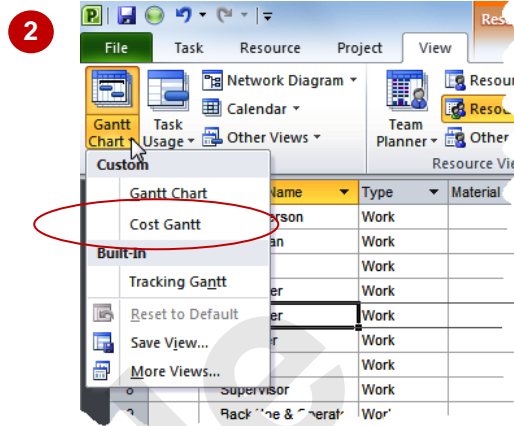** dialog box is automatically on, which means that the view should appear in either the ***Resource*** or the ***Task*** menus. If you can't find the custom view on the menu it will always appear in the ***More Views*** dialog box.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file J415 Views_3.mpp...

1. Click on the ***View*** tab on the ***Ribbon*** and click on ***Details*** in ***Split View*** until it appears without a tick – this will ensure that we have a single screen view

2. Click on the drop arrow for ***Gantt Chart*** in the ***Task Views*** group to display a menu of views

3. Click on ***Cost Gantt*** to see the custom ***Cost Gantt*** view

4. Click on the drop arrow next to ***Resource Sheet*** in the ***Resource Views*** group to display a menu of resource views

5. Click on ***Resource Costs*** to display the custom split-screen view

6. Click on ***Details*** in ***Split View*** until it appears un-ticked

7. Click on ***Other Views*** in the ***Task Views*** group and click on ***More Views***

8. Scroll up to and click on ***Cost Gantt*** and click on **[Apply]**

For Your Reference…

To display a custom view:

1. Click on an appropriate resource or task view on the ***View*** tab that will display a menu of views
2. Click on the desired custom view

Handy to Know…

- If the custom views have not appeared in the menus (as shown above) then the ***Show in menu*** setting must have been unticked when the custom view was being defined.

- Remember, if you can't find a view on the menu it will always be in the ***More Views*** dialog box.

USING CUSTOM VIEWS

Once custom views have been created they are ready for use. When a custom view is created, the ***Show in menu*** setting in the ***View Definition*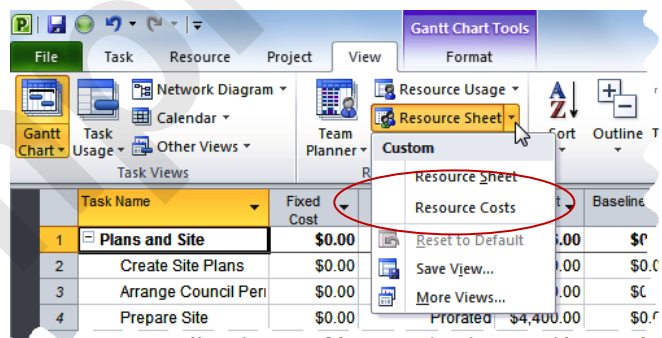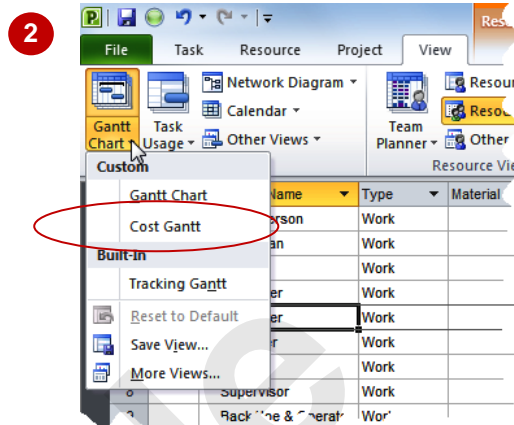** dialog box is automatically on, which means that the view should appear in either the ***Resource*** or the ***Task*** menus. If you can't find the custom view on the menu it will always appear in the ***More Views*** dialog box.

Try This Yourself:

Open File   *Before starting this exercise you MUST open the file J415 Views_3.mpp...*

1. Click on the ***View*** tab on the ***Ribbon*** and click on ***Details*** in ***Split View*** until it appears without a tick – this will ensure that we have a single screen view

2. Click on the drop arrow for ***Gantt Chart*** in the ***Task Views*** group to display a menu of views

3. Click on ***Cost Gantt*** to see the custom ***Cost Gantt*** view

4. Click on the drop arrow next to ***Resource Sheet*** in the ***Resource Views*** group to display a menu of resource views

5. Click on ***Resource Costs*** to display the custom split-screen view

6. Click on ***Details*** in ***Split View*** until it appears un-ticked

7. Click on ***Other Views*** in the ***Task Views*** group and click on ***More Views***

8. Scroll up to and click on ***Cost Gantt*** and click on **[Apply]**

For Your Reference…

To display a custom view:

1. Click on an appropriate resource or task view on the ***View*** tab that will display a menu of views
2. Click on the desired custom view

Handy to Know…

- If the custom views have not appeared in the menus (as shown above) then the ***Show in menu*** setting must have been unticked when the custom view was being defined.

- Remember, if you can't find a view on the menu it will always be in the ***More Views*** dialog box.

CUSTOMISING THE VIEW MENUS

The **View Definition** dialog box is used to create custom views. But it can also be used to make changes to existing views in a project. One of the settings on the dialog box, **Show in menu**, determines whether the view is displayed in a menu list on the **Ribbon**. You can use this setting to perform a rudimentary customisation of the menus so that they show only the views you want.
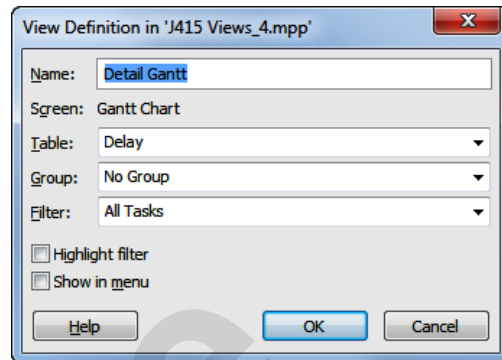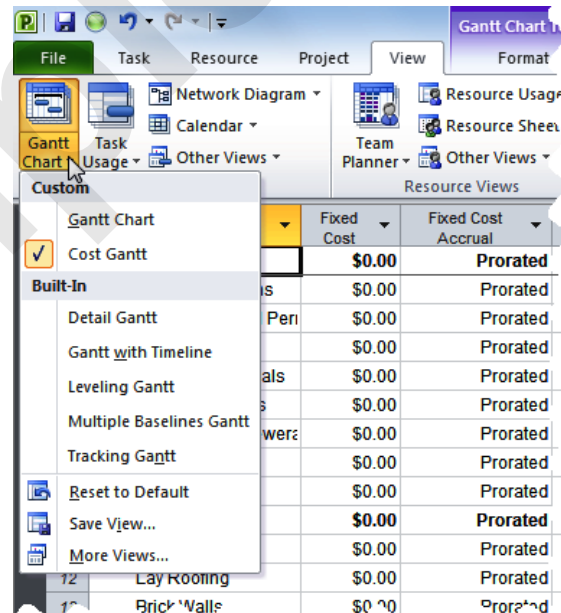
Try This Yourself:

Open File

Before starting this exercise you MUST open the file J415 Views_4.mpp...

1 Click on the **View** tab on the **Ribbon** and click on the **Gantt Chart** drop arrow in the **Task Views** group

2 Click on **More Views** to display the **More Views** dialog box

3 Click on **Detail Gantt** and click on **[Edit]** to display the **View Definition** dialog box

4 Click on **Show in menu** until it appears ticked and click on **[OK]**

5 Repeat steps **3** and **4** for the **Gantt with Timeline**, **Levelling Gantt**, and **Multiple Baseliness Gantt Views**

6 Click on **[Close]** to close the **More Views** dialog box

7 Click on the **Gantt Chart** drop arrow to see these views now appear on the menu

8 Click on **Gantt Chart**

3

View Definition in 'J415 Views_4.mpp'

Name: Detail Gantt
Screen: Gantt Chart
Table: Delay
Group: No Group
Filter: All Tasks

☐ Highlight filter
☐ Show in menu

Help   OK   Cancel

7

For Your Reference…

To put views on a menu:

1. Click on the view in the **More Views** dialog box and click on **[Edit]**
2. Tick the **Show in menu** setting to see the view on the menu
3. Click on **[OK]**

Handy to Know…

- Views can be removed from the menu again simply by unticking the **Show in menu** setting in the **View Definition** dialog box.

- Views where the primary screen is based on tasks will appear on **Task** menus, while ones with resource primary screens will appear in **Resource** menus.

SAVING AN EXISTING VIEW

Custom views can be created by manipulating settings in the *View Definition* dialog box. However, the downside of this is that you can't see what these changes are doing until you actually apply the custom view. Microsoft Project allows you to *save* all of the settings currently on your screen into a *custom view* – this process effectively allows you to prototype a view.
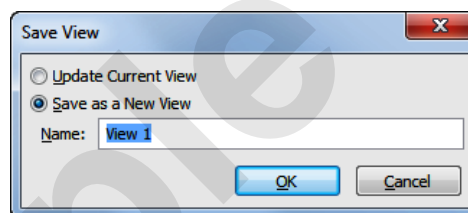
Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file J415 Views_5.mpp...

1 Click on the *View* tab on the *Ribbon*, click on the *Gantt* chart drop arrow in the *Task Views* group and click on *Gantt Chart*

2 Click on the *Tables* drop arrow in the *Data* group and click on *Work* to use the *Work* table in the view

3 Drag the table divider across until the first three columns are clearly visible

4 Click on the *Gantt Chart* drop arrow and click on *Save View* to display the *Save View* dialog box

5 Ensure *Save as a New View* is selected, type **Gantt with Work** and click on **[OK]**

6 Click on the *Gantt Chart* drop arrow and notice that the new view appears

7 Click on *Gantt Chart*, click on the *Tables* drop arrow and click on *Entry* to restore the original table to this view
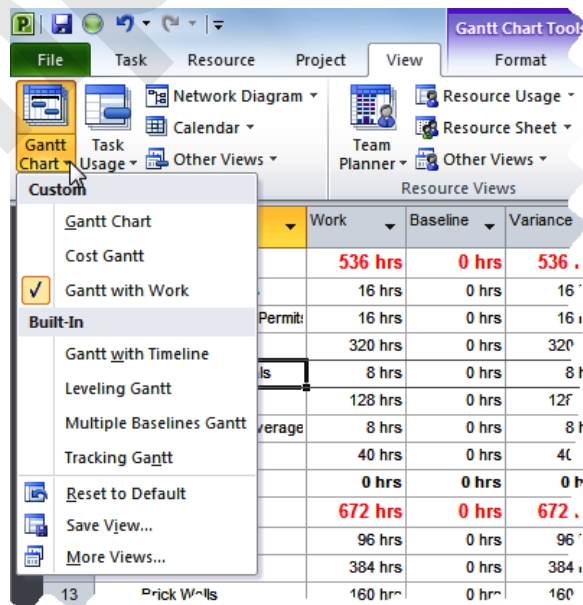
For Your Reference…

To save an existing view:

1. Define the screen elements in the way you wish
2. Click on the *Gantt Chart* drop arrow and click on *Save View*
3. Type a name for the view and click on **[OK]**

Handy to Know…

- In the screen show above, the new view appears ticked in the menu – this indicates that it is the currently active view.

DELETING UNWANTED VIEWS

Custom views can be created for permanent or temporary use. The problem is that once you get the hang of custom views there is a good chance you'll readily and quickly create them for all forms of usage. There comes a time however when a bit of management and maintenance is required. You can delete unwanted views in Microsoft Project through the special *Organiser* facility.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file J415 Views_6.mpp...

1 Click on the *View* tab on the *Ribbon*, click on *Other Views* in *Task Views* and click on *More Views*

**2** Click on **[Organiser]** to display the *Organiser* dialog box

3 Click on *Cost Gantt* on the right and click on **[Delete]** to receive a warning message

4 Click on **[Yes]**

Notice that the view still appears in the Global template even though it has been deleted from the project file on the right...
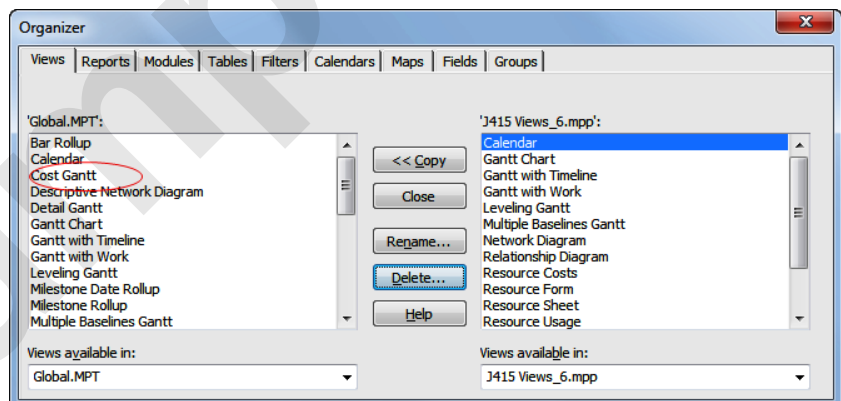
5 Click on *Cost Gantt* on the left, click on **[Delete]** and click on **[Yes]**

6 Click on **[Close]** to close the *Organiser*, then **[Close]** to close the *More Views* dialog box

7 Click on the *Gantt Chart* drop arrow and notice that the *Cost Gantt* has gone
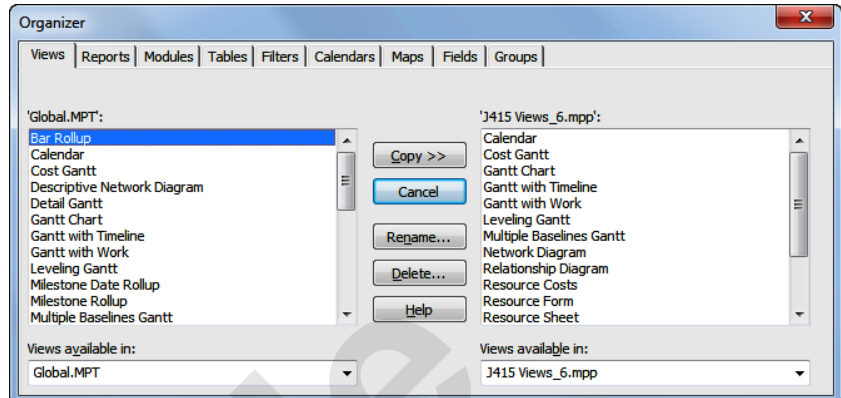
2 *This dialog box shows the views in the Global template on the left and in the current project on the right...*

For Your Reference…

To delete a view:
1. Click on the *View* tab, click on *Other Views*, click on *More Views*, then click on **[Organiser]**
2. Click on the name of the view and click on **[Delete]**

Handy to Know…

- When you create a custom view it is automatically added by Microsoft Project to the *global template* so that it can immediately be used by other projects you create. You must remember to delete it from the current project as well as the global template if you no longer need that view.

KEEPING NEW VIEWS LOCAL

Microsoft Project *automatically* saves new views, tables, filters, and groups to the *global template* so that they are available to other projects you create. If you are working with other people however, this process can cause grief as each one of you applies your own custom features to Microsoft Project. The automatic saving to the global template can be switched off.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file J415 Views_6.mpp...

1 Click on the *File* tab on the *Ribbon* and click on *Options* to display the *Project Options* dialog box

2 Click on the *Advanced* tab at the left

3 Click on *Automatically add new views, tables, filters, and groups to the global* until it appears without a tick

4 Click on **[OK]**

3
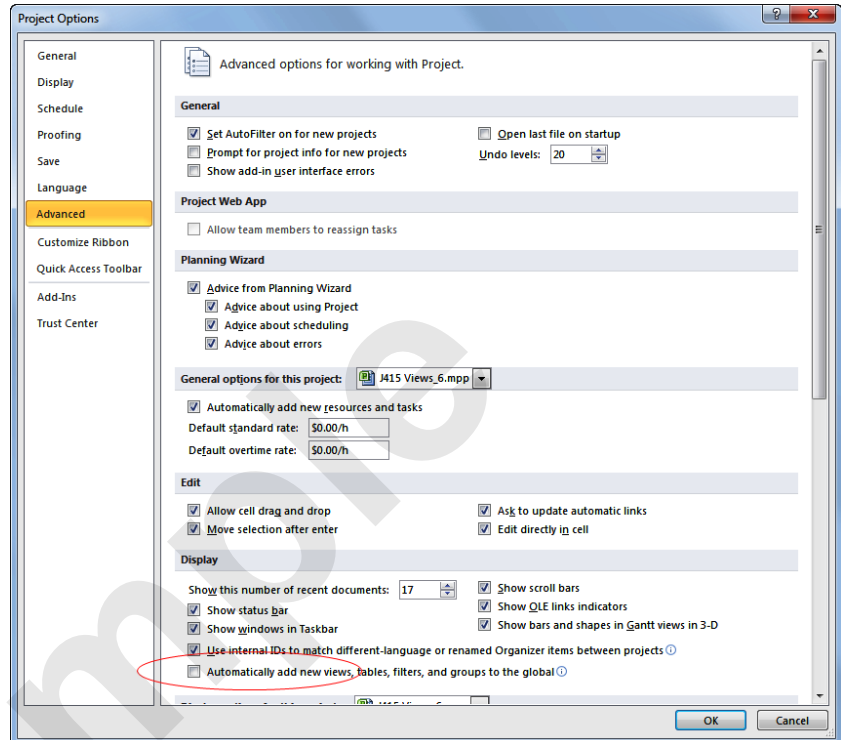
For Your Reference…

To keep views local:

1. Click on the *File* tab on the *Ribbon* and click on *Options*
2. Click on the *Advanced* tab
3. Un-tick *Automatically add new views, tables, filters, and groups to the global*

Handy to Know…

- If you are sharing your copy of Microsoft Project with other users then you should keep your own views, tables, filters, etc, local. *Local* just means that they will be saved to your file rather than to the global template.