

Create basic view activities

Activity 1: Create a task status view

As a project manager, team lead, or resource manager, you want to keep track of how task work is progressing. With this view, you get several status indicators of a task all in one row of the list or report.

Create a task view named “Task Status View” with the following columns:

- Task Name
- Assignments
- Duration
- Percent Complete
- Status
- Progress Status
- Status Icons

Answer 1

New View

Task Status View

Show in this column:

Task > Status Icons

Task

Progress Status

Status

Status Bar

Status Icons

Adjusted Velocity Status

Approvers and Status

Assignments And Status

Calculated Status

Done

Column Settings

Advanced Options

Switch to Text Mode

Column Preview

+ Add Column

TASK NAME	ASSIGNMENTS	DURATION	% COMPLETE	STATUS	PROGRESS STATUS	STATUS ICONS
Train Inside Sales Team		1234 Minutes	75%	In Progress	Late	

Save View Cancel

1. In a task list report, go to the **View** drop-down menu and select **New View**.
2. Name your view “Task Status View.”
3. Remove these columns: Pln Hrs, Predecessors, Start On, and Due On.
4. Click **Add Column**.
5. In the Show in this column field, type “status” then select “Status” under the Task field source.
6. Click **Add Column** again.
7. In the Show in this column field, type “status” then select “Progress Status” under the Task field source.
8. Click **Add Column** again.
9. In the Show in this column field, type “status” then select “Status Icons” under the Task field source.
10. Click **Save**.

Hover over each of the icons in the Status Icons column to see what they represent. If they are grayed out, it means the task has no notes, documents, approval processes, etc. If an icon appears in color, there is at least one of that item associated with the task. You can click on the note or document icons to go to that item.

Activity 2: Create a milestone view

If you use milestones, this view is the easiest way to see milestones by name and add or edit them using in-line edit.

Create a task view named “Milestone View” with the following columns:

- Task Name
- Assignments
- Duration
- Pln Hrs
- Milestone: Name
- Start On
- Due On
- Percent Complete

Answer 2

The screenshot shows the 'Customize View' interface. At the top, the view is named 'Milestone View'. Below this, there is a search box for 'Show in this column:' with the text 'milestone name' entered. A dropdown menu is open, showing 'Milestone' and 'Name' as options. To the right of the search box is a 'Column Settings' section. At the bottom of the 'Customize View' section is a 'Done' button.

Below the 'Customize View' section is the 'Column Preview' section. It shows a table with the following columns: TASK NAME, ASSIGNMENTS, DURATION, PLN HRS, COLUMN, START ON, DUE ON, and % COMPLETE. The 'COLUMN' column is highlighted. Below the table are buttons for 'Save View', 'Cancel', and 'Save as New View'.

TASK NAME	ASSIGNMENTS	DURATION	PLN HRS	COLUMN	START ON	DUE ON	% COMPLETE
Train Inside Sales Team		1234 Minutes	20.57 Hours		6/29/23	7/1/23	75%

1. In a project task list, go to the **View** drop-down menu and select **New View**.
2. Name your view “Milestone View.”
3. Click on the Predecessors column to select it.

- In the Show in this column field, click on the X icon in the Task >> Predecessors field, then type “milestone name” and click on “Name” in the list.
- Click **Save**.

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Percent Complete 37.46% Project Owner Roy Campbell Planned Completion Date Aug 7, 2023 Condition At Risk Status Current

Tasks

# ↑	Task Name	Assignments	Duration	Pln Hrs	Milestone: Name	Start On	Due On	% Complete
1	> Create Copy & Layout		31 Days	204 Hours	Copy & Layout	3/20/23	5/2/23	99.31%
8	> Photoshoot		10 Days	120 Hours	Photoshoot	3/20/23	4/2/23	100%
13	▼ Creative		37 Days	72 Hours	Start typing name	5/3/23	6/22/23	4.17
14	Creative Review	David White Cheryl O'Connor	15 Days	8 Hours	Copy & Layout			
15	Production	Cheryl O'Connor	20 Days	40 Hours	Final Review			
16	Present and Review Creative	David White Freddy Rumsen Cheryl O'Connor	1 Day	24 Hours	Photoshoot			
17	▼ Implement Approved Changes		5 Days	80 Hours	Internal Changes			
18	Implement Approved Copy Changes	Ann Owen	3 Days	24 Hours	Vendor Changes	6/23/23	6/27/23	0%
19	Implement Approved Design Changes	Joey Baird	5 Days	40 Hours	Creative	6/23/23	6/29/23	0%

Activity 3: Create a duration types and task constraints view

This view will allow you to examine and edit all the durations types and task constraints in your project.

Create a task view named “Duration types and task constraints view” with the following columns:

- Task Name
- Assignments
- Duration
- Planned Duration
- Pln Hrs
- Predecessors
- Start On
- Due On
- Duration Type
- Task Constraint
- Constraint Date

Change the Field Format on the Start On and Due On columns to display both the date and the time.

Answer 3

#	Task Name	Assignments	Duration	Planned Duration	Pln Hrs	Predecessors	Planned Start Date	Planned Completion Date	Duration Type	Task Constraint	Constraint Date
3	Program Guide and Booth		11.5 Days	11.5 Days	71 Hours		4/13/23 12:00 PM	5/1/23 4:00 PM	Simple	As Late As Possible	
4	Program Guide Copy	Bert Cooper Ann Owen	4 Days	4 Days	10 Hours	3-1	4/13/23 12:00 PM	4/19/23 12:00 PM	Simple	Must Finish On	4/19/23
5	Booth Drop Design	Bert Co... Peggy...	4 Days	4 Days	10 Hours	4-1	4/19/23 4:00 PM	4/26/23 4:00 PM	Calculated Assign...	As Late As Possible	
6	File a huge stack of papers	Peggy Olson Bert Cooper Ann Owen	3 Days	4 Days	24 Hours	4-4	4/25/23 4:00 PM	5/1/23 4:00 PM	Effort Driven	As Late As Possible	
7	Booth Drop Approved by Event Organization	Donna Frits	0 Days	0 Days	0 Hours	5-5	4/26/23 4:00 PM	4/26/23 4:00 PM	Simple	As Late As Possible	
8	Booth Graphics Design	Mary Smith	3 Days	3 Days	9 Hours	7-7	4/26/23 4:00 PM	5/1/23 4:00 PM	Simple	As Late As Possible	
9	Booth Graphics Sent to Printer	Joan Harris	0.25 Days	0.25 Days	2 Hours	4fs+ Sd	4/20/23 12:00 PM	4/20/23 2:00 PM	Simple	As Late As Possible	
10	Furniture & Booth Accessories	Megan Calvet	0.4 Weeks	0.4 Weeks	16 Hours	9-9	4/27/23 4:00 PM	5/1/23 4:00 PM	Simple	As Late As Possible	

1. In a project task list, go to the **View** drop-down menu and select **New View**.
2. Name your view “Duration types and task constraints view.”
3. Remove the % Complete column.
4. Click **Add Column**.
5. In the Show in this column field, type “duration” then select “Planned Duration” under the Task field source.
6. Move this column between the Duration and the Pln Hrs columns.
7. Click **Add Column** again.
8. In the Show in this column field, type “duration type” then select “Duration Type” under the Task field source.
9. Click **Add Column** again.
10. In the Show in this column field, type “constraint” then select “Task Constraint” under the Task field source.
11. Click **Add Column** again.
12. In the Show in this column field, type “constraint” then select “Constraint Date” under the Task field source.
13. Select the Start On column, then click on Advanced Options.

14. Under the Field Format drop down select “10/17/60 3:00 AM”.
15. Select the Due On column, then click on Advanced Options.
16. Under the Field Format drop down select “10/17/60 3:00 AM”.
17. Click **Save**.

Activity 4: Create a project template active status view

Anyone who manages project templates will appreciate seeing the active status (True or False) of each template in a list. Even better - the field is in-line editable!

Create a project template view named “Standard+active status” with the following columns:

- Name
- Owner
- Duration
- Planned Hours
- Planned Cost
- Flags
- Group Name
- Is Active

Answer 4

Name	Owner	Duration	Planned Hours	Planned Cost	Flags	Group Name	Is Active
Event Template	Joan Harris	47.5 Days	443 Hours	\$19,375.00	🔖 📄 🔄		False
Project template to deactivate		22.5 Days	197 Hours	\$8,585.00	🔖 📄 🔄	Marketing	False
Web_Landing_Page_Email_Banner Sample Template (Digital)	Joan Harris	35 Days	39.25 Hours	\$1,761.25	🔖 📄 🔄		False
Quarterly Catalog Template	Joan Harris	65 Days	641 Hours	\$32,580.00	🔖 📄 🔄		True

1. In a project template list, go to the **View** drop-down menu and select **New View**.
2. Name your view “Standard+active status.”
3. Click **Add Column**.
4. In the Show in this column field, type "is " then select “Is Active” under the Template field source.
5. Click **Save View**.