Create basic view activities

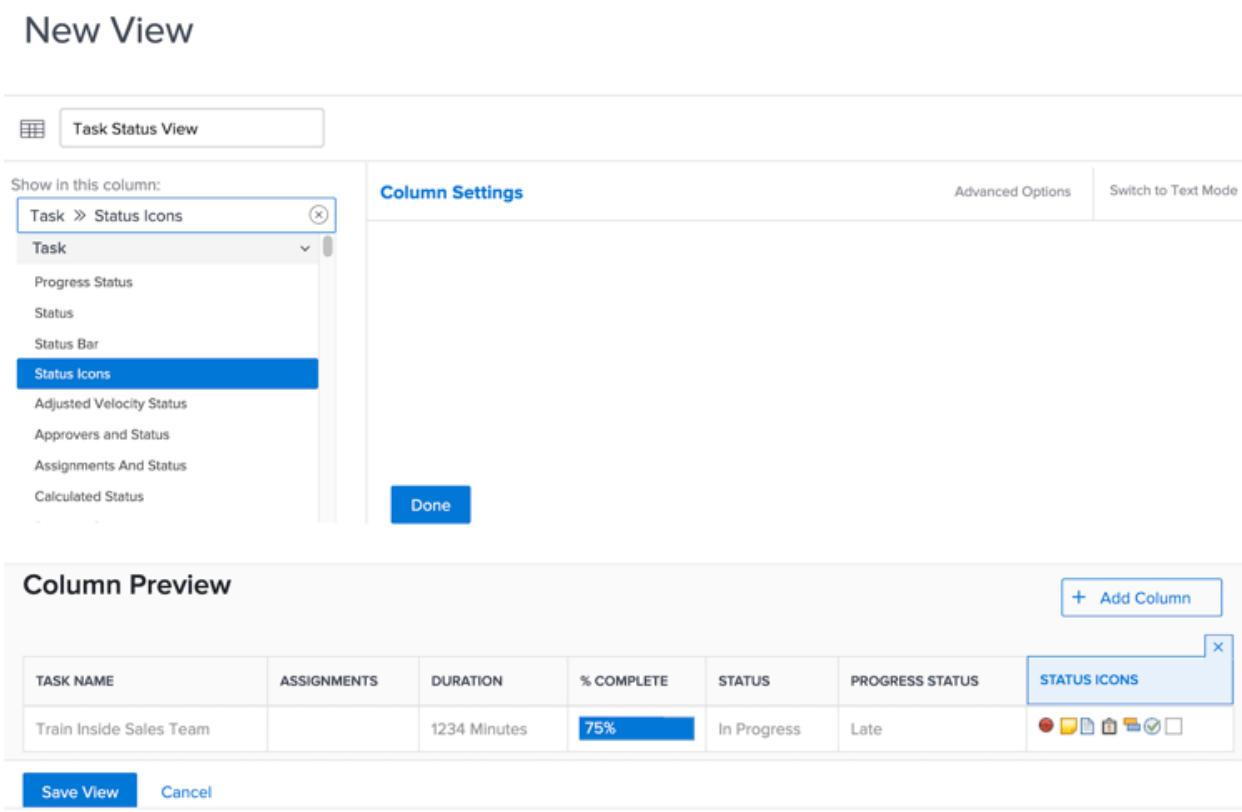
Activity 1: Create a task status view

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



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.

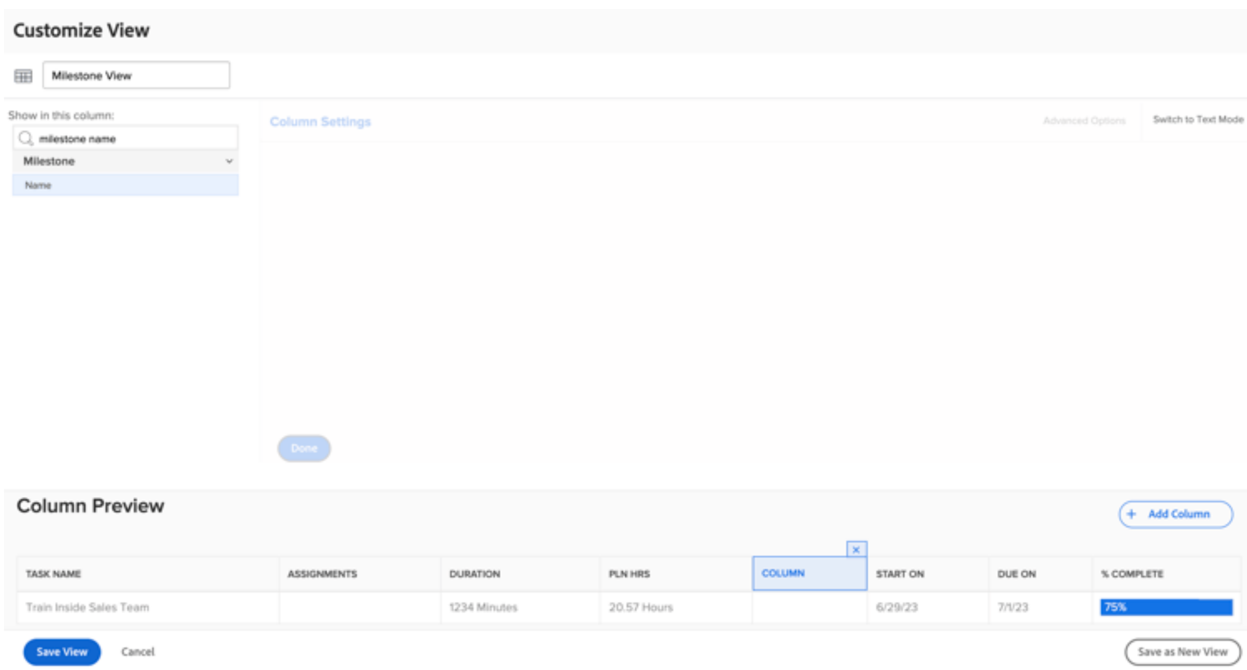
Activity 2: Create a milestone view

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

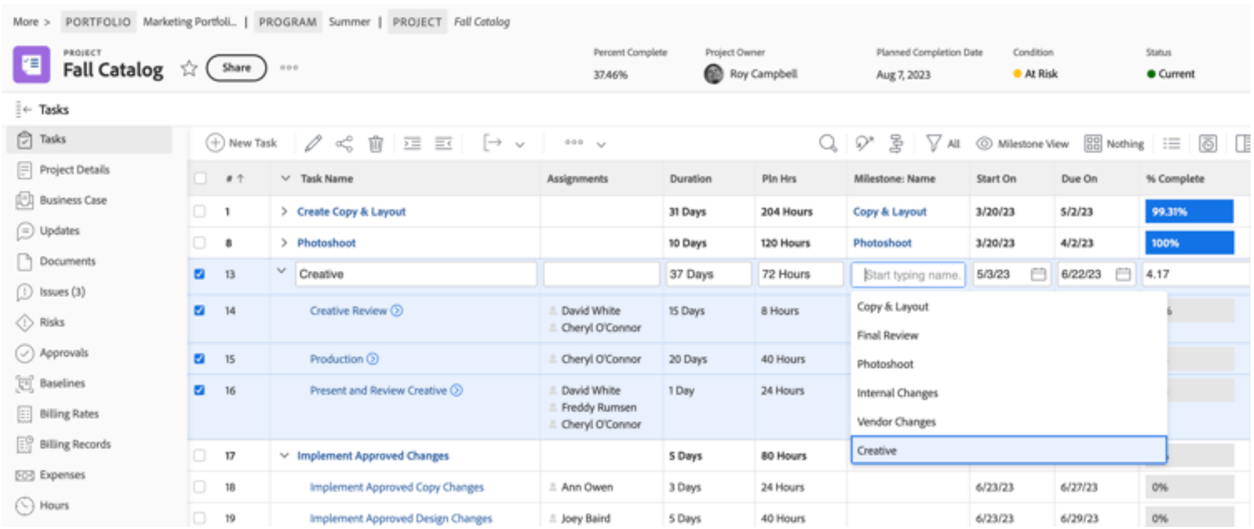
Answer 2



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.

4. 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.

5. Click **Save**.



Activity 3: Create a duration types and task constraints view

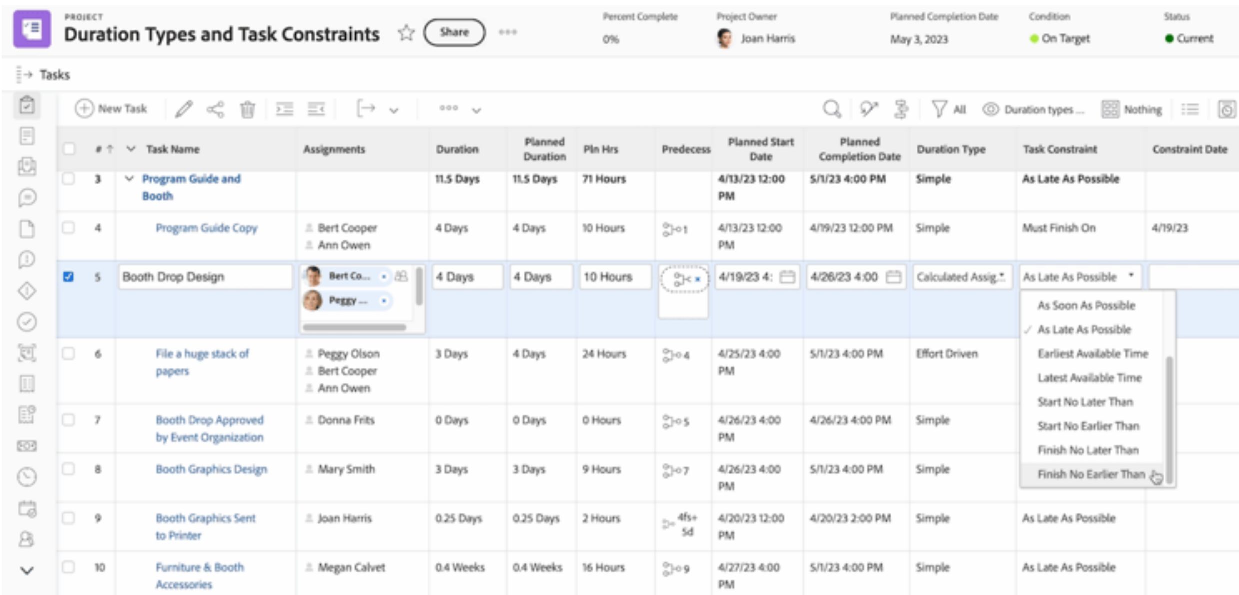
This view will allow you to examine and edit all the durations types and task constraints in your project.

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



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**.

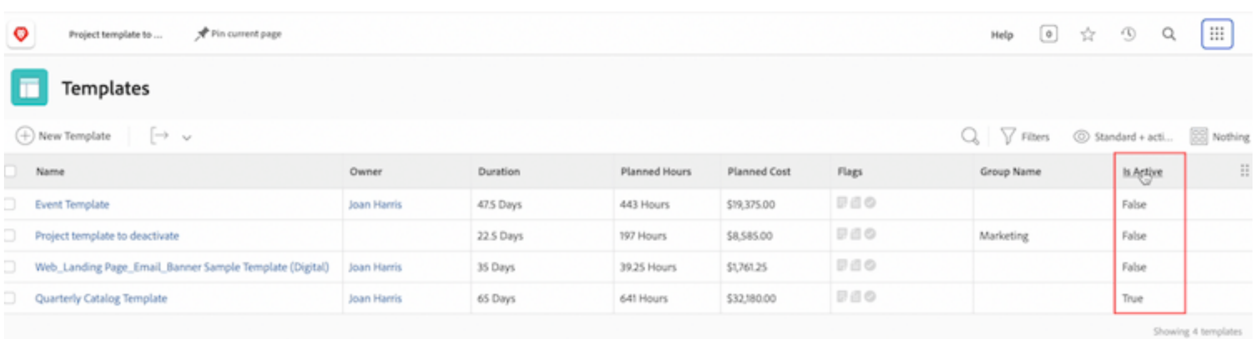
Activity 4: Create a project template active status view

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



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**.