

Customizing Views in Microsoft Project

In this article, we will explore Views in **MS PROJECT 2010 PROFESSIONAL**! First I will create an example. I have a Project with four Tasks:

	Task Mode	Task Name	Duration	Start	Finish	Predecessors	Resource Names
0		My Sample Project	10 days	30.1.2012	10.2.2012		
1		Task 1	1 day	30.1.2012	30.1.2012		Resource 1
2		Task 2	2 days	31.1.2012	1.2.2012	1	Resource 2
3		Task 3	3 days	2.2.2012	6.2.2012	2	Resource 3
4		Task 4	4 days	7.2.2012	10.2.2012	3	Resource 4

and four Resources:

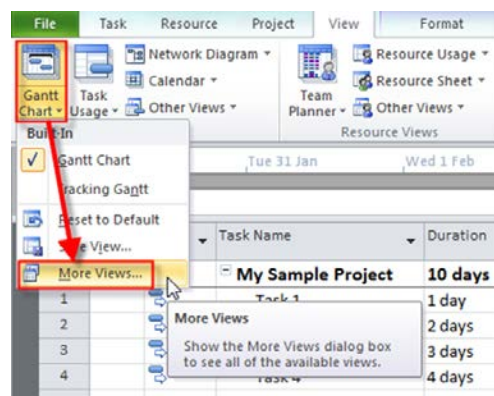
	Resource Name	Type	Material	Initials	Group	Max.	Std. Rate	Ovt. Rate	Cost/Use	Accrue At
1	Resource 1	Work		R		100%	\$100,00/hr	\$150,00/hr	\$0,00	Prorated
2	Resource 2	Work		R		100%	\$120,00/hr	\$180,00/hr	\$0,00	Prorated
3	Resource 3	Work		R		100%	\$140,00/hr	\$210,00/hr	\$0,00	Prorated
4	Resource 4	Work		R		100%	\$160,00/hr	\$240,00/hr	\$0,00	Prorated

and those Resources are assigned to Tasks:

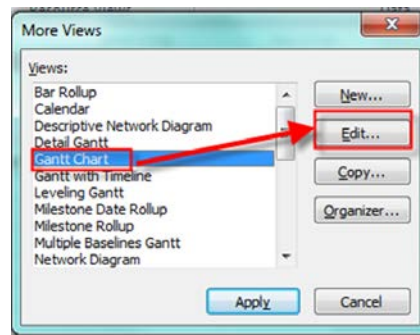


OK! This is a Gantt Chart. In the standard Gantt Chart you can see data like in the picture above. But why? Where are those fields come from?

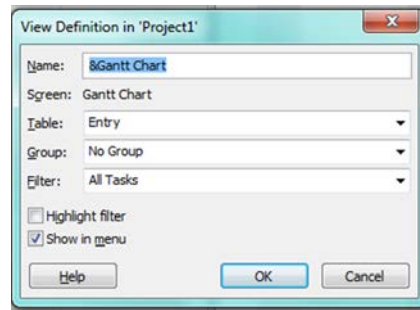
You can edit this View to get an answer to this question:



and then:

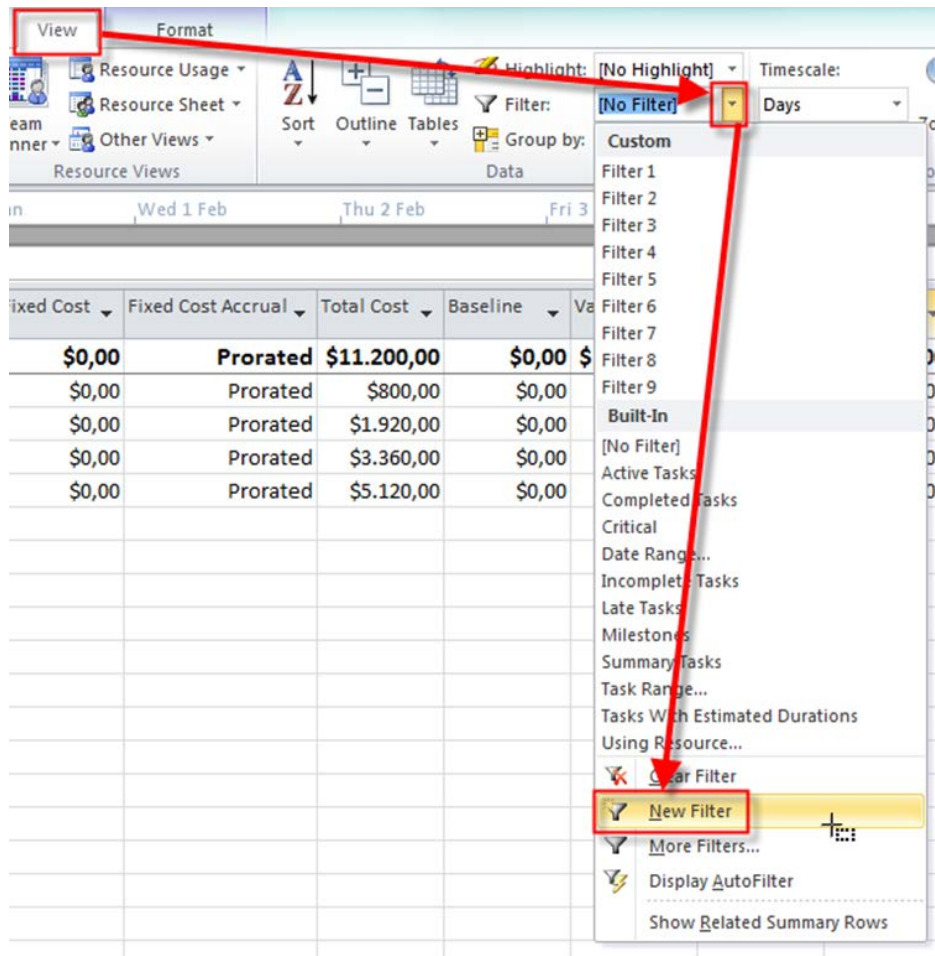


and I will get:

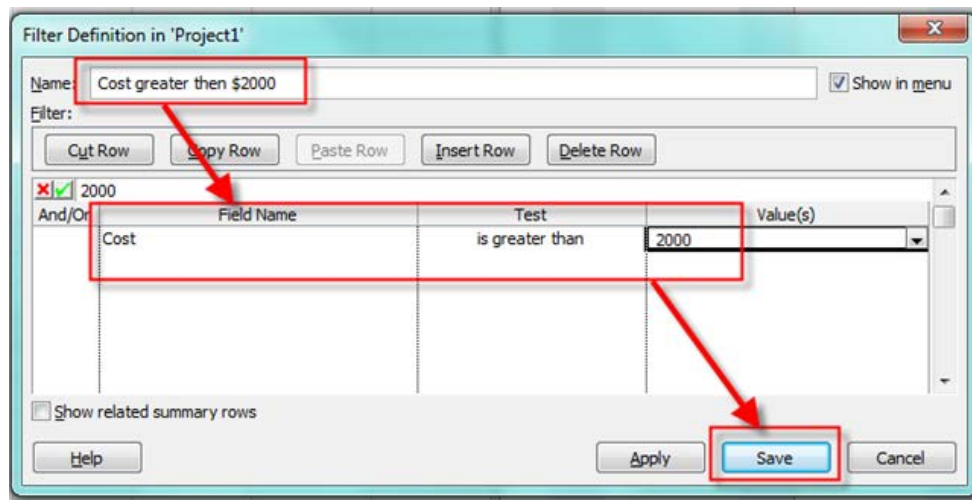


- *Name*: The name of the View
- *Table*: The Table showed in the View
- *Group*: How the data is grouped
- *Filter*: Which Filter is applied

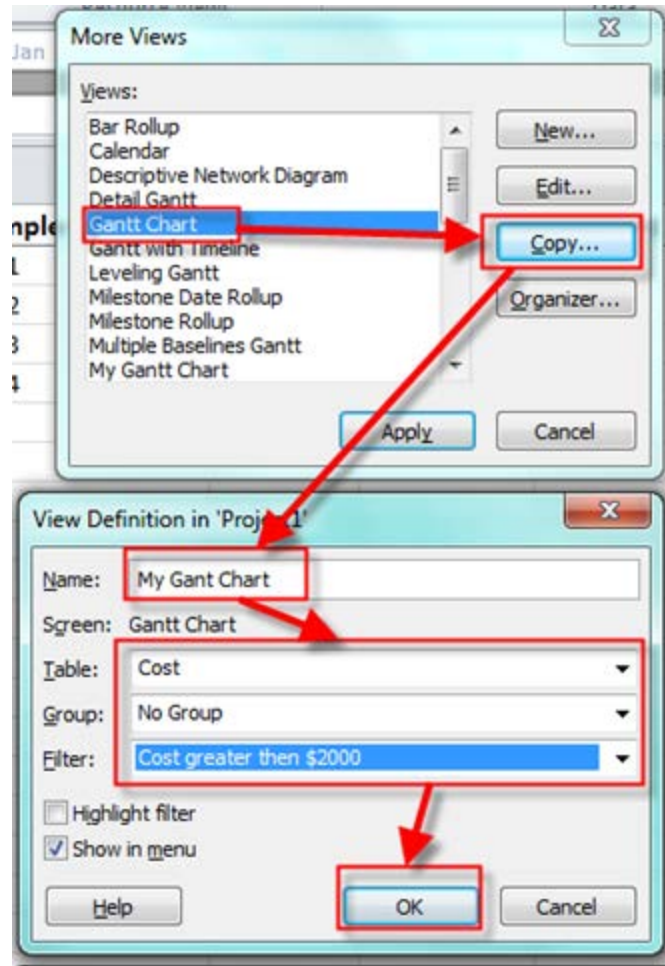
Now I will make brand new view from the Gantt Chart. First I will create new Filter:



and then:



Now I will make the new view:



And I will get:

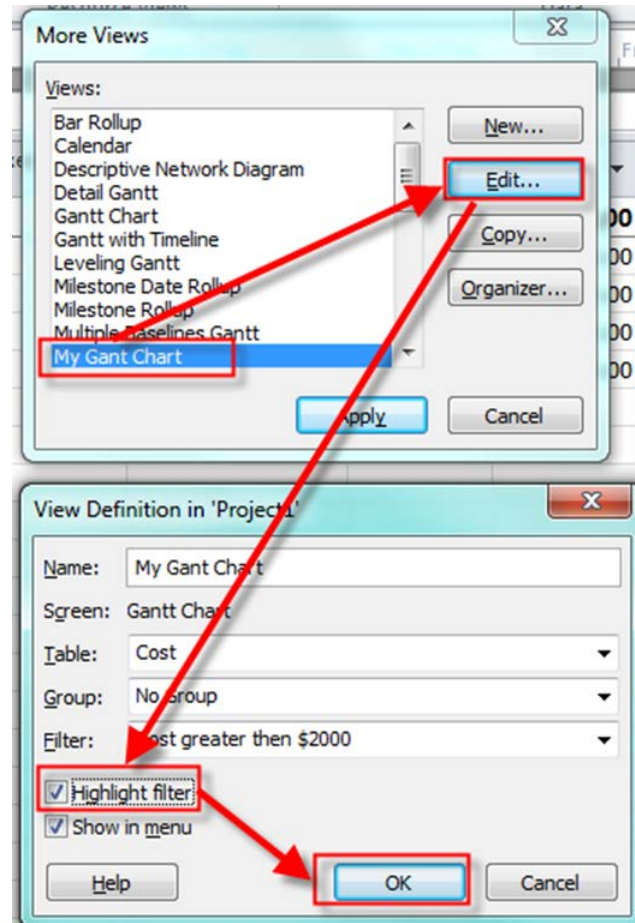
	Task Name	Fixed Cost	Fixed Cost Accrual	Total Cost	Baseline	Variance	Actual
0	My Sample Project	\$0,00	Prorated	\$11.200,00	\$0,00	\$11.200,00	
3	Task 3	\$0,00	Prorated	\$3.360,00	\$0,00	\$3.360,00	
4	Task 4	\$0,00	Prorated	\$5.120,00	\$0,00	\$5.120,00	

Only *Task 3*, and *Task 4* are displayed because they have *Cost* greater than \$2,000.

If I apply a “normal” Gantt Chart with *Cost Table* I will get:

	Task Name	Fixed Cost	Fixed Cost Accrual	Total Cost	Baseline	Variance	Actual	Remaining
0	My Sample Project	\$0,00	Prorated	\$11.200,00	\$0,00	\$11.200,00	\$0,00	\$11.200,00
1	Task 1	\$0,00	Prorated	\$800,00	\$0,00	\$800,00	\$0,00	\$800,00
2	Task 2	\$0,00	Prorated	\$1.920,00	\$0,00	\$1.920,00	\$0,00	\$1.920,00
3	Task 3	\$0,00	Prorated	\$3.360,00	\$0,00	\$3.360,00	\$0,00	\$3.360,00
4	Task 4	\$0,00	Prorated	\$5.120,00	\$0,00	\$5.120,00	\$0,00	\$5.120,00

Now I will change *My Gantt Chart* in a way that I will check *Highlight Filter*:



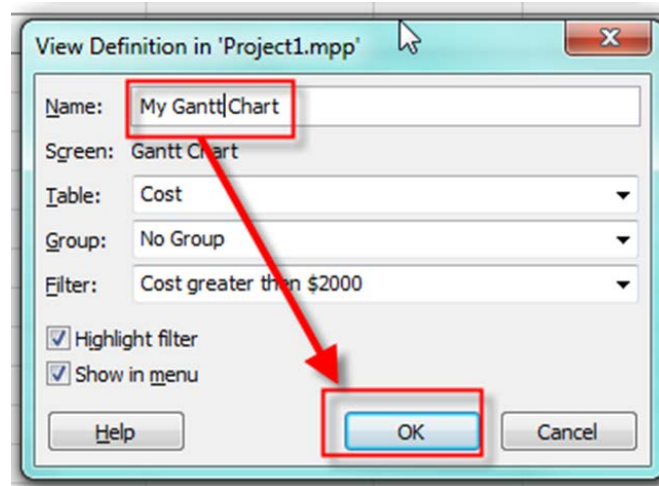
and I will get:

Task Name	Fixed Cost	Fixed Cost Accrual	Total Cost	Baseline	Variance	Actual	Remaining	
0	My Sample Project	\$0,00	Prorated	\$11.200,00	\$0,00	\$11.200,00	\$0,00	\$11.200,00
1	Task 1	\$0,00	Prorated	\$800,00	\$0,00	\$800,00	\$0,00	\$800,00
2	Task 2	\$0,00	Prorated	\$1.920,00	\$0,00	\$1.920,00	\$0,00	\$1.920,00
3	Task 3	\$0,00	Prorated	\$3.360,00	\$0,00	\$3.360,00	\$0,00	\$3.360,00
4	Task 4	\$0,00	Prorated	\$5.120,00	\$0,00	\$5.120,00	\$0,00	\$5.120,00

The image shows a Gantt chart view of the project. The tasks are represented as horizontal bars on a timeline. Task 1 (Jan 23 - Jan 29) is assigned to Resource 1. Task 2 (Jan 29 - Feb 5) is assigned to Resource 2. Task 3 (Feb 5 - Feb 11) is assigned to Resource 3. Task 4 (Feb 11 - Feb 13) is assigned to Resource 4. All task bars are highlighted in yellow, indicating they all meet the filter criteria of 'Cost greater than \$2,000'.

You can see, that I get all tasks, but those with Cost greater than \$2,000 are highlighted!

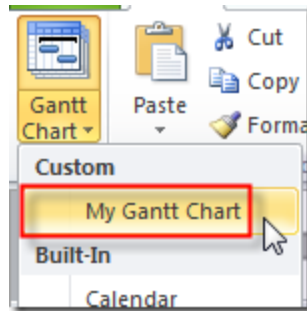
OOOPS! Guys I put *My Gant Chart* instead of *My Gantt Chart*. I will change the name very simply:



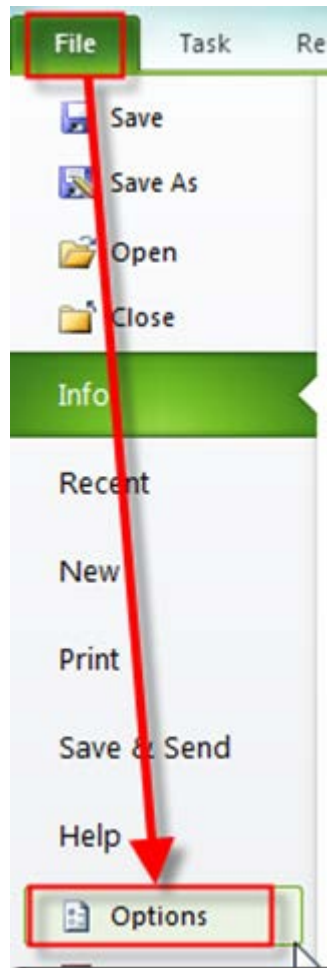
And I'll get:

[illegible]

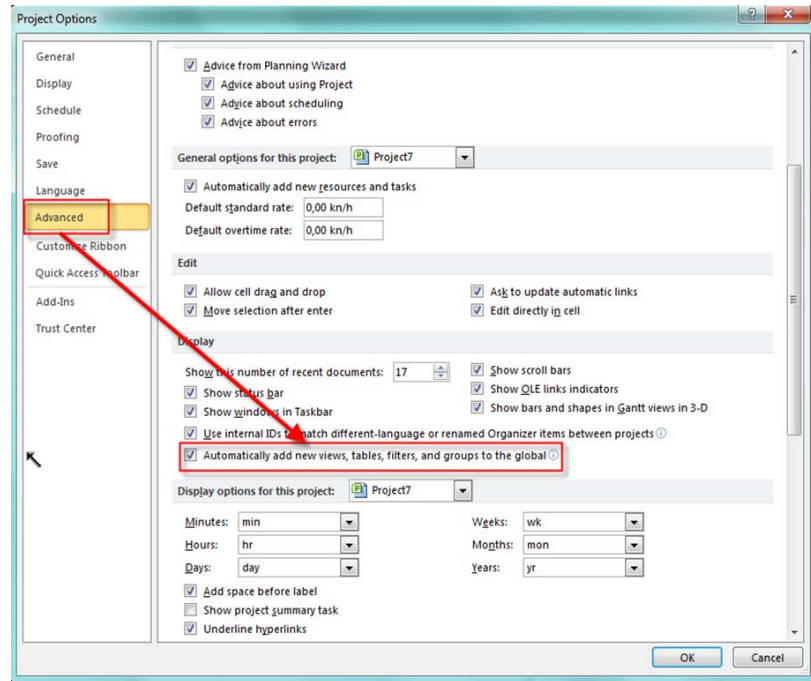
I will close **MS PROJECT 2010**, and reopen it again:



As you can see, My Gantt Chart is here. Why? Because of this:

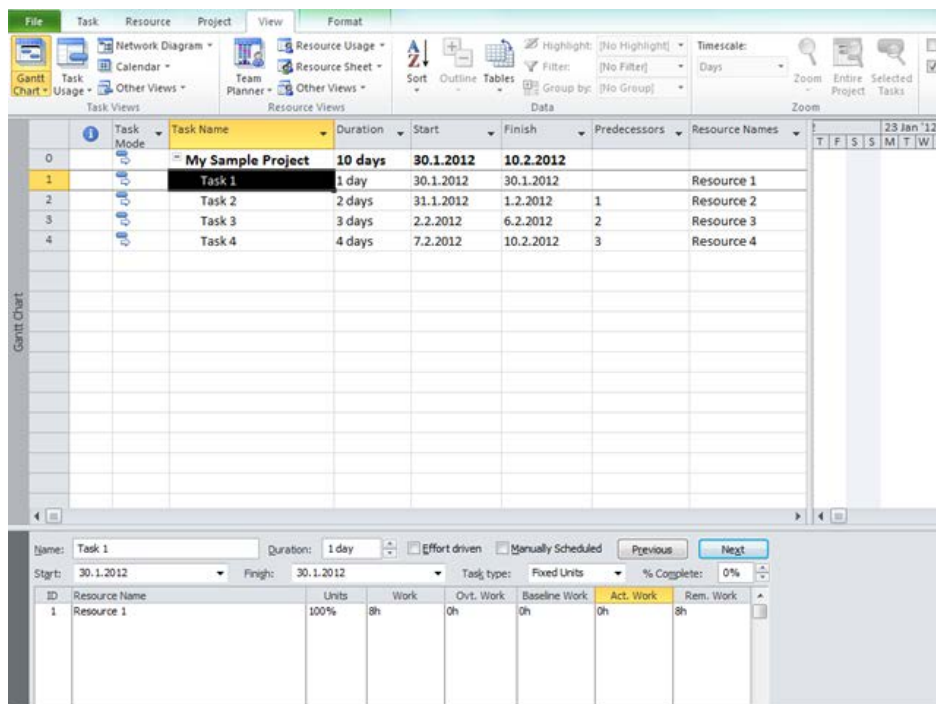


and:

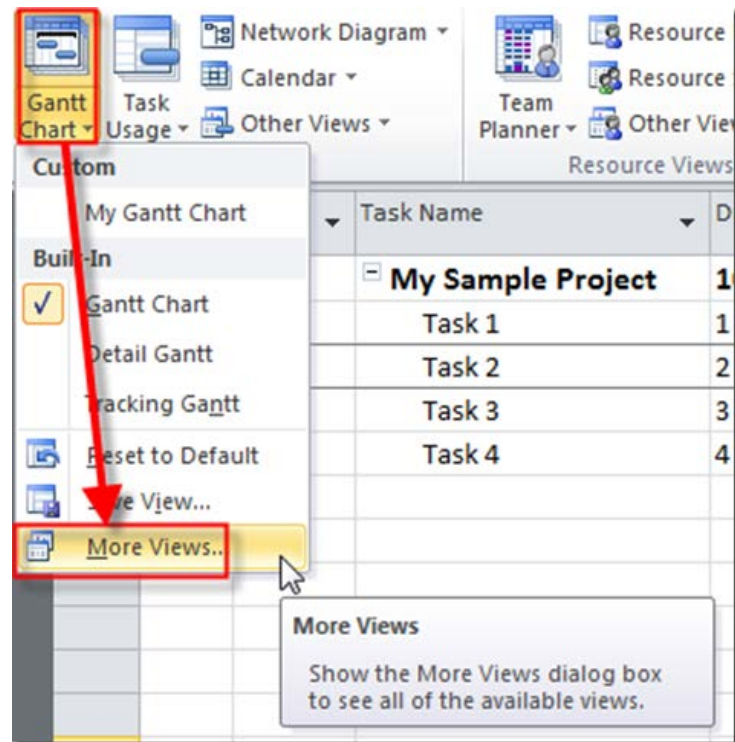


Notice that when *Automatically add new views, tables, filters, and groups to the global* is checked, any new view, table, etc. added in one project will reflect to all Projects in the future. If you want to make a custom View, Table, etc. only for current Project, remove this check mark!

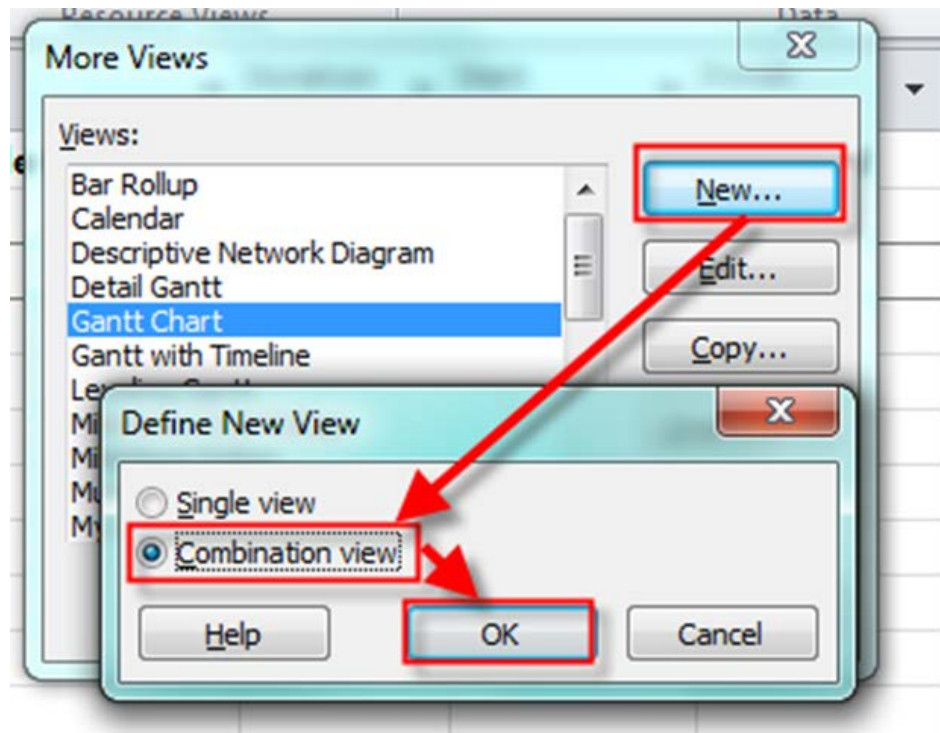
Notice there are two different types of View in **MS PROJECT 2010**: *Single View*, and *Combination View*. Example of Single View is *Gantt Chart*, and example of Combination View is *Task Entry*:



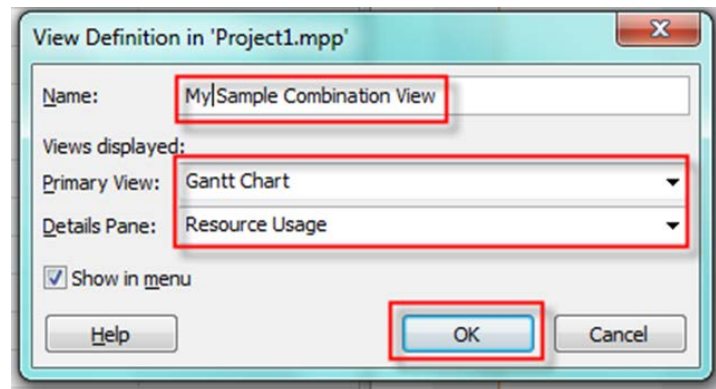
Now I will show how to create a Brand new View:



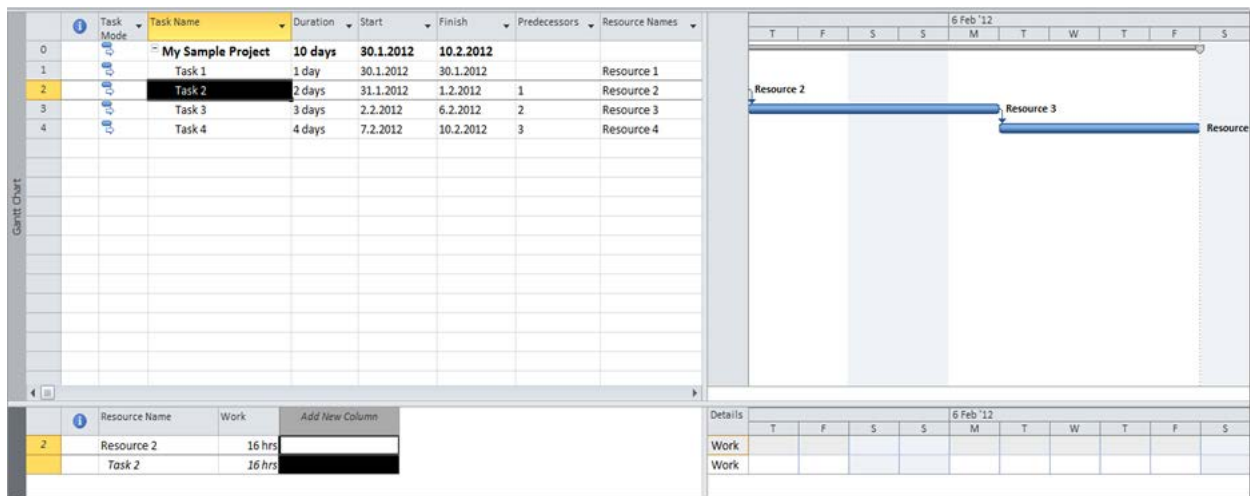
and then:



So, I will create the Combination View:



and I will get:



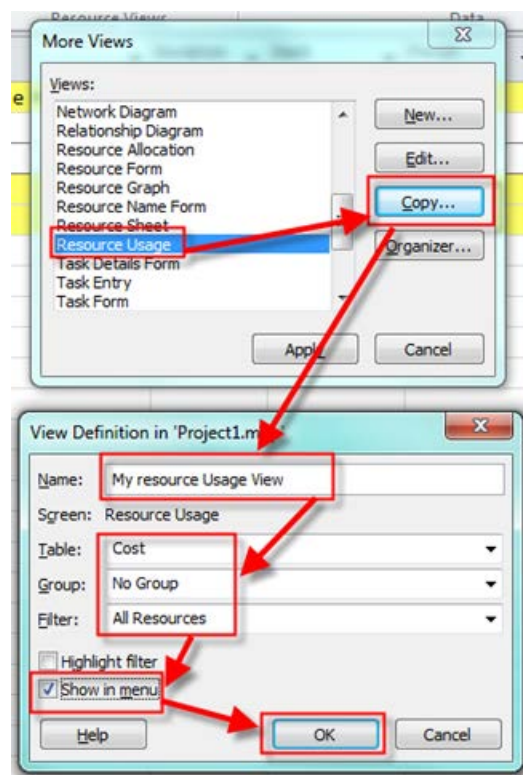
But what if I want that My Sample Combination View has customized portion.

If you read earlier in the article you will recall that I made a customized Gantt Chart View:

		Task Mode	Task Name	Duration	Start	Finish	Predecessors	Resource Names
0			My Sample Project	10 days	30.1.2012	10.2.2012		
1			Task 1	1 day	30.1.2012	30.1.2012		Resource 1
2			Task 2	2 days	31.1.2012	1.2.2012	1	Resource 2
3			Task 3	3 days	2.2.2012	6.2.2012	2	Resource 3
4			Task 4	4 days	7.2.2012	10.2.2012	3	Resource 4

My Gantt Chart

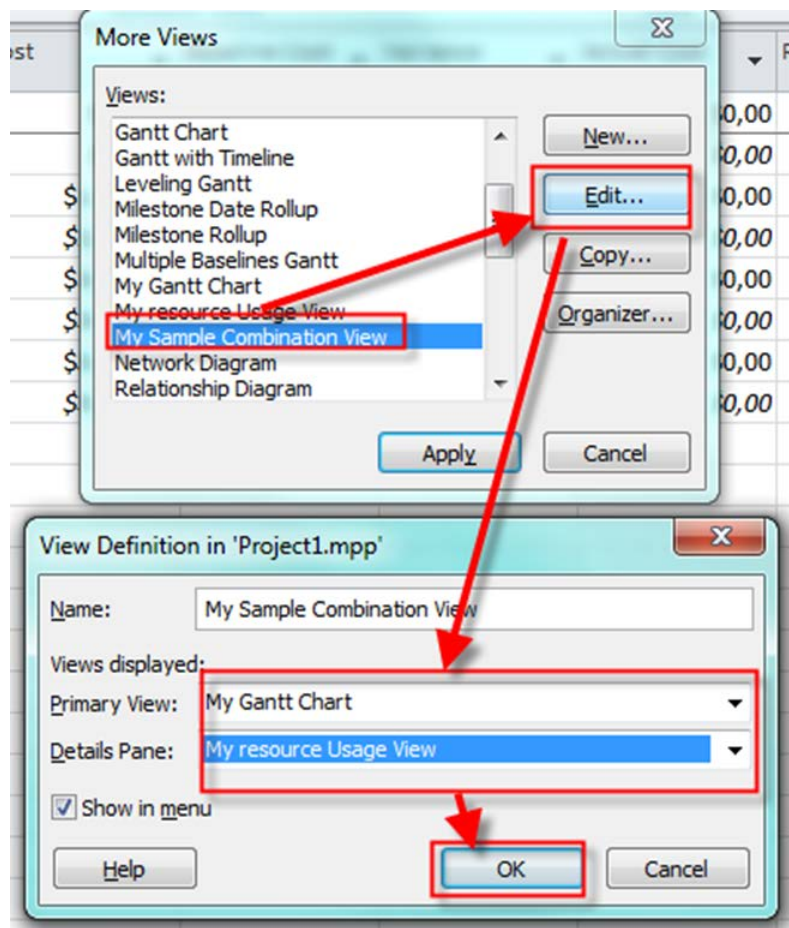
I will make a custom *Resource Usage* View:



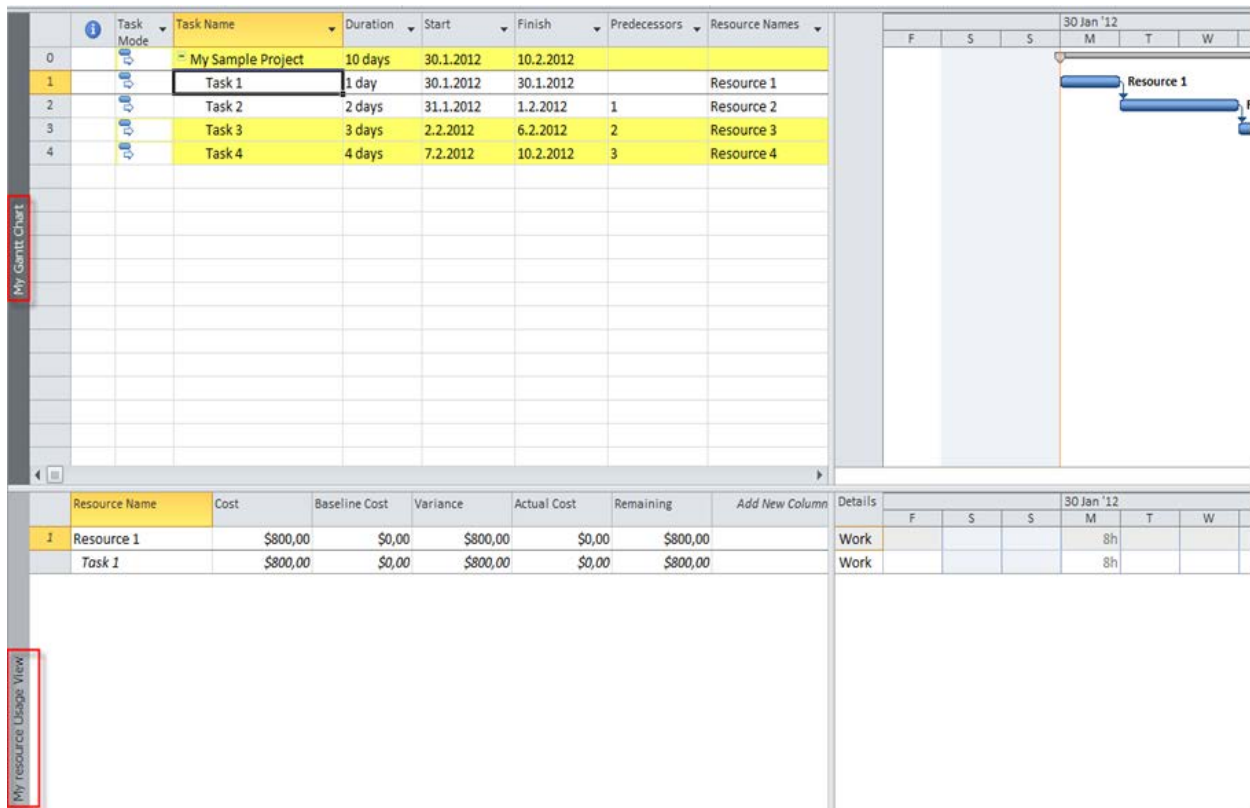
and I will get:

[illegible]

Now I will change *My Sample Combination View*:

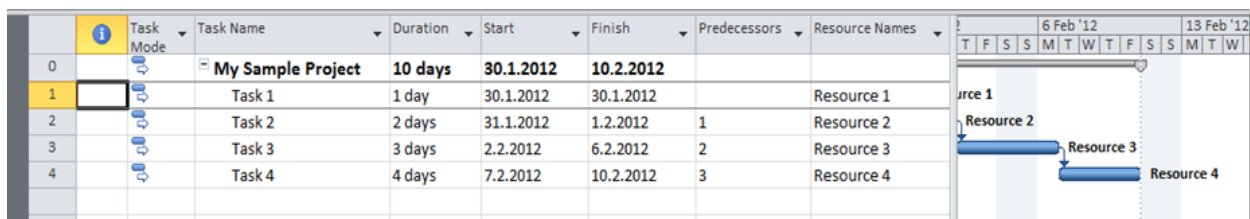


and I will get:

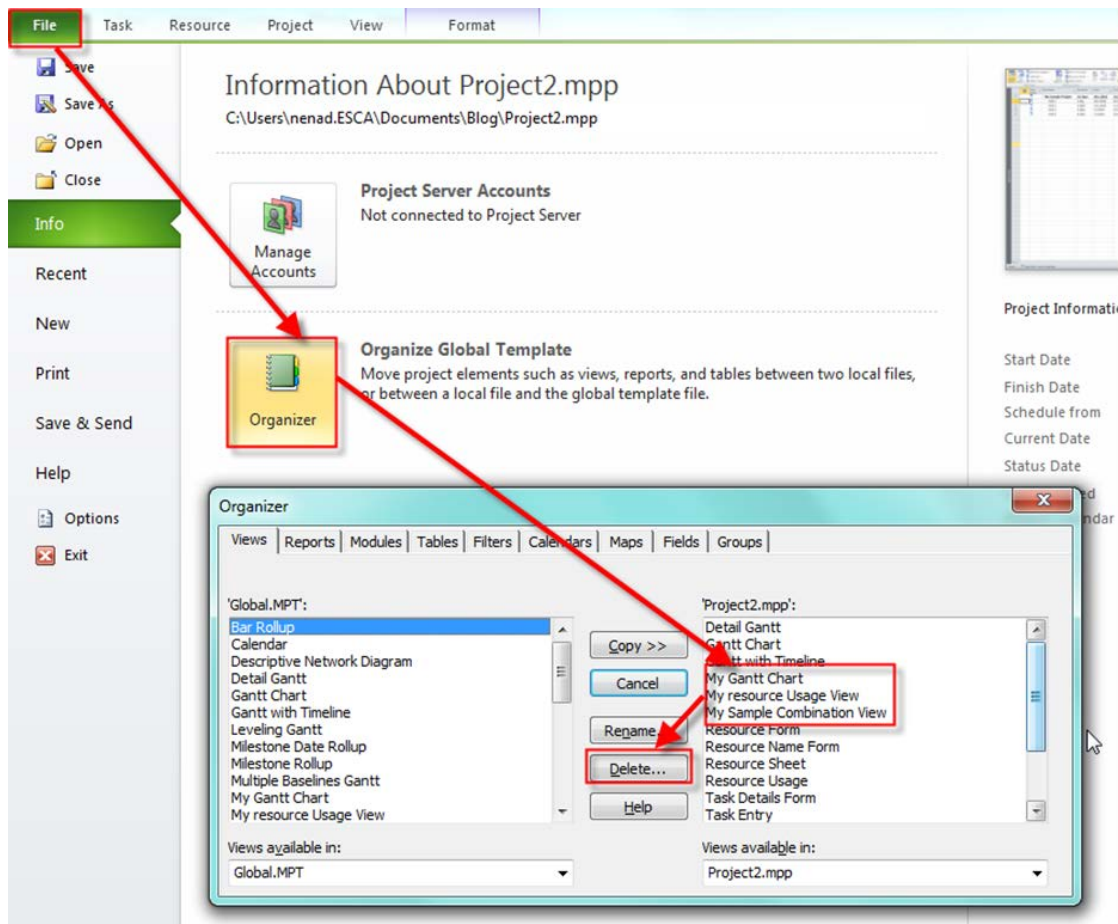


Notice that in my upper portion of the Screen I have *My Gantt Chart* with filter applied, and in the lower part of the Screen I have *My Resource Usage View* with the Cost Table applied.

OK! Since I don't need those examples any more I will delete them. First I will close all Custom Views in a way that I am going to choose any other View except one that I want to delete (in my example I will choose regular Gantt Chart):

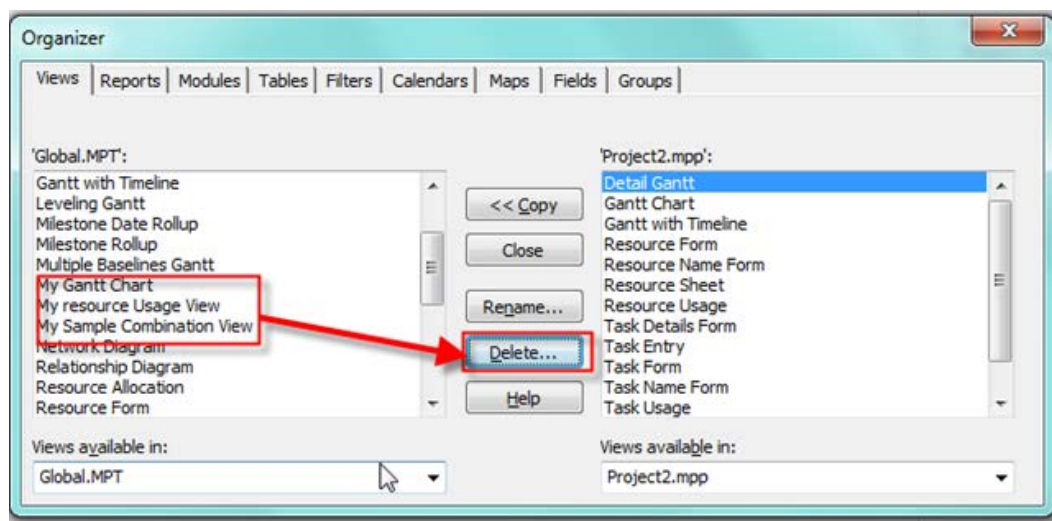


Now I am going to the *Organizer*:



Here I choose to delete those Views from my current Project.

Since I will not need those Views in the future, I will erase them from the Global template:



Notice that when you erase something from the Global template, it is gone forever.