

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:

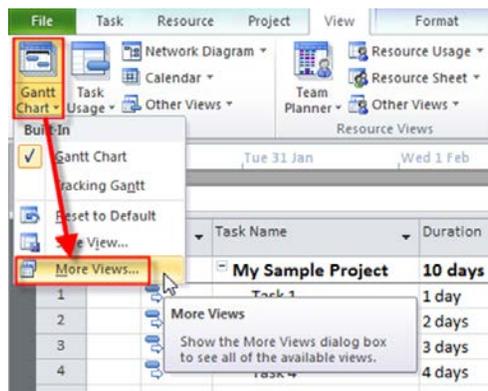
| | Resource Name | Type | Material | Initials | Group | Max. | Std. Rate | Ovt. Rate | Cost/Use | Accrue At |
|---|---------------|------|----------|----------|-------|------|-------------|-------------|----------|-----------|
| 1 | Resource 1 | Work | | R | | 100% | \$100,00/hr | \$150,00/hr | \$0,00 | 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:

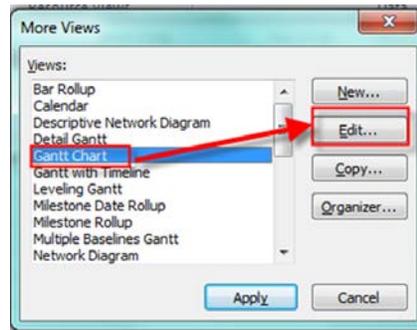


OK! This is a Gantt Chart. In the standard Gantt Chart you can see data like in the picture above. But why? Where are those fields come from?

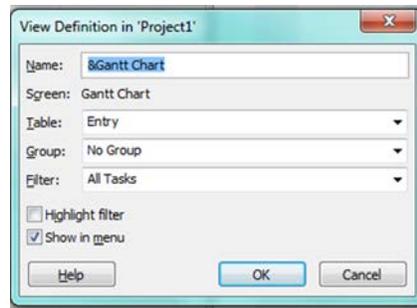
You can edit this View to get an answer to this question:



and then:

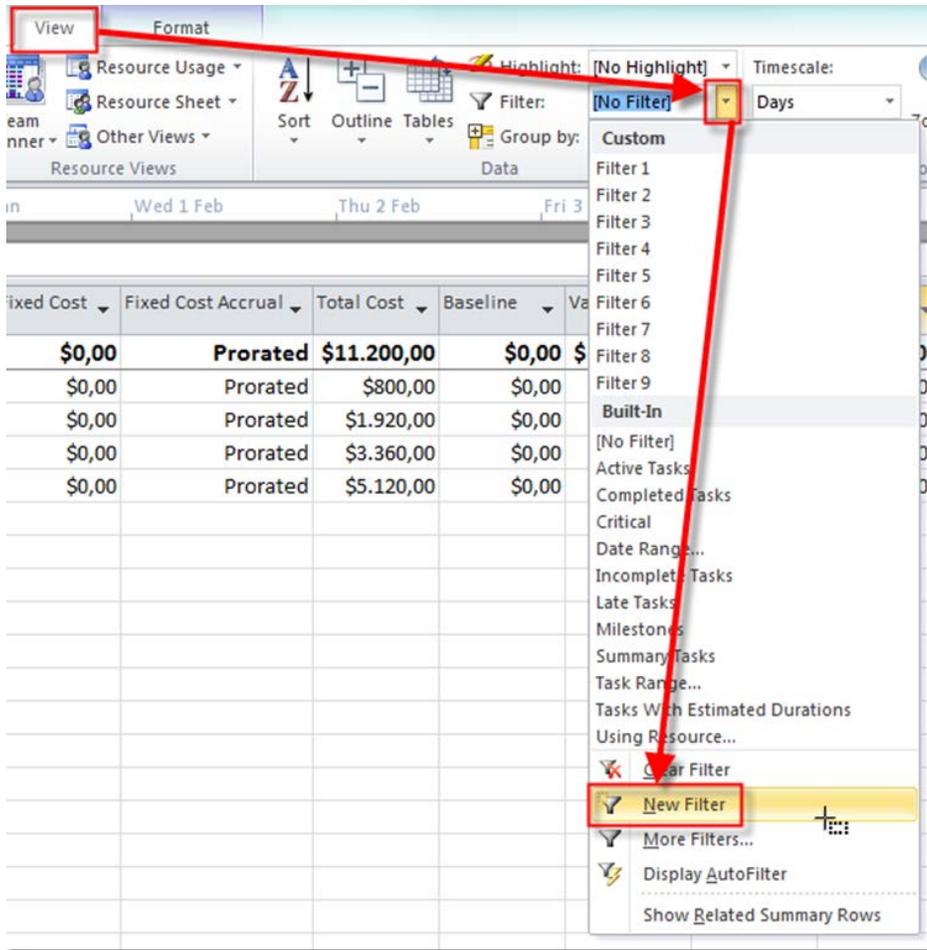


and I will get:

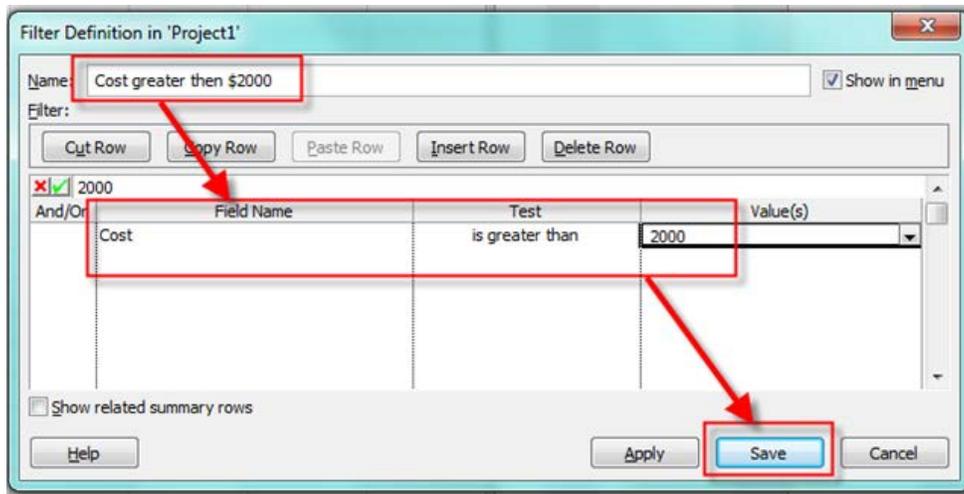


- *Name*: The name of the View
- *Table*: The Table showed in the View
- *Group*: How the data is grouped
- *Filter*: Which Filter is applied

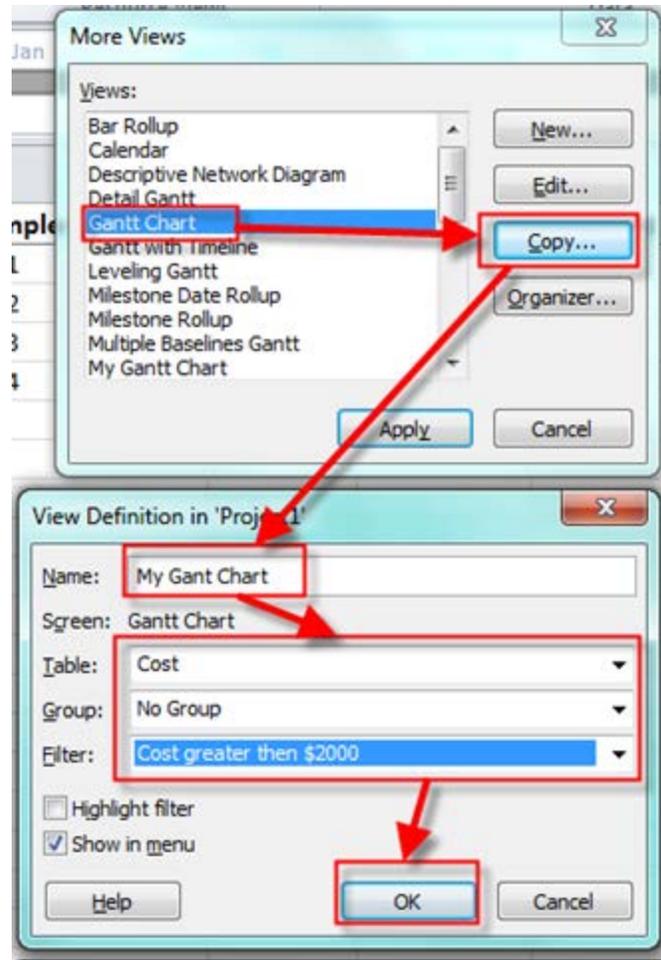
Now I will make brand new view from the Gantt Chart. First I will create new Filter:



and then:



Now I will make the new view:



And I will get:

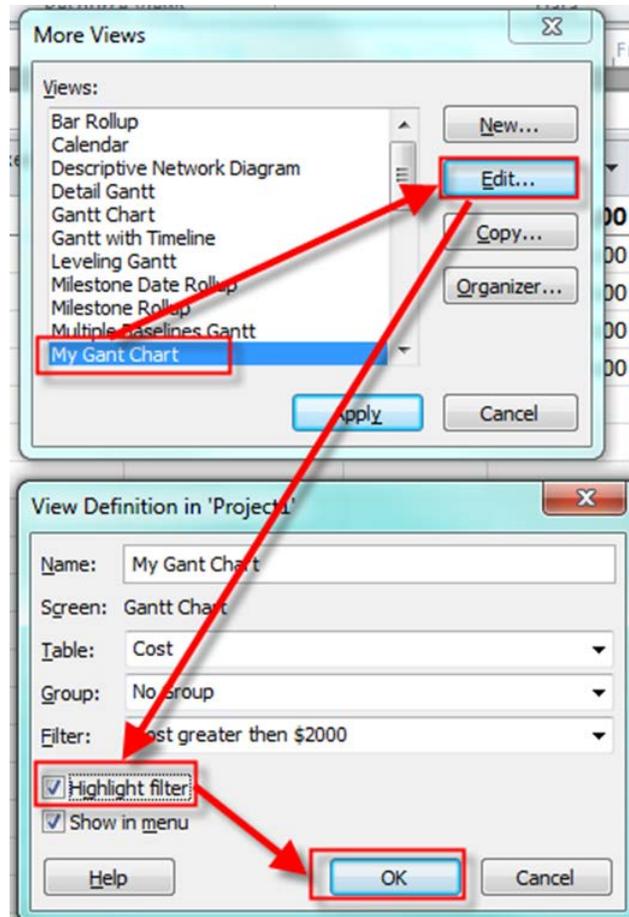
| | Task Name | Fixed Cost | Fixed Cost Accrual | Total Cost | Baseline | Variance | Actu |
|---|-------------------|------------|--------------------|-------------|----------|-------------|------|
| 0 | My Sample Project | \$0,00 | Prorated | \$11.200,00 | \$0,00 | \$11.200,00 | |
| 3 | Task 3 | \$0,00 | 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*:

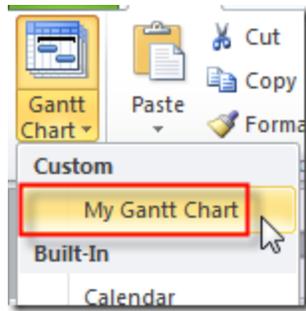


and I will get:

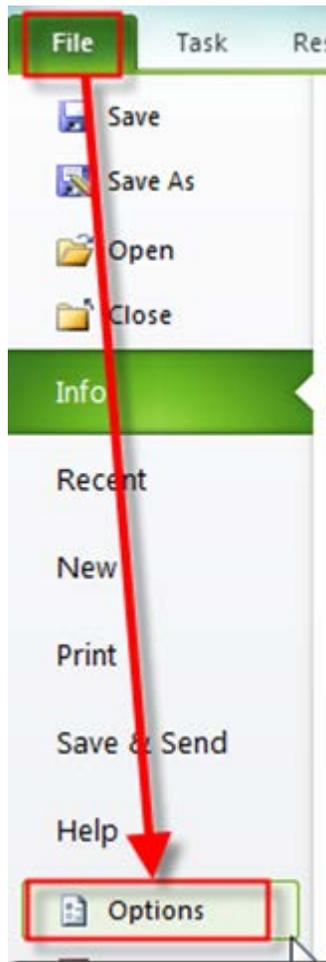
| Task Name | Fixed Cost | Fixed Cost Accrual | Total Cost | Baseline | Variance | Actual | Remaining |
|-------------------|------------|--------------------|-------------|----------|-------------|--------|-------------|
| My Sample Project | \$0,00 | Prorated | \$11.200,00 | \$0,00 | \$11.200,00 |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

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

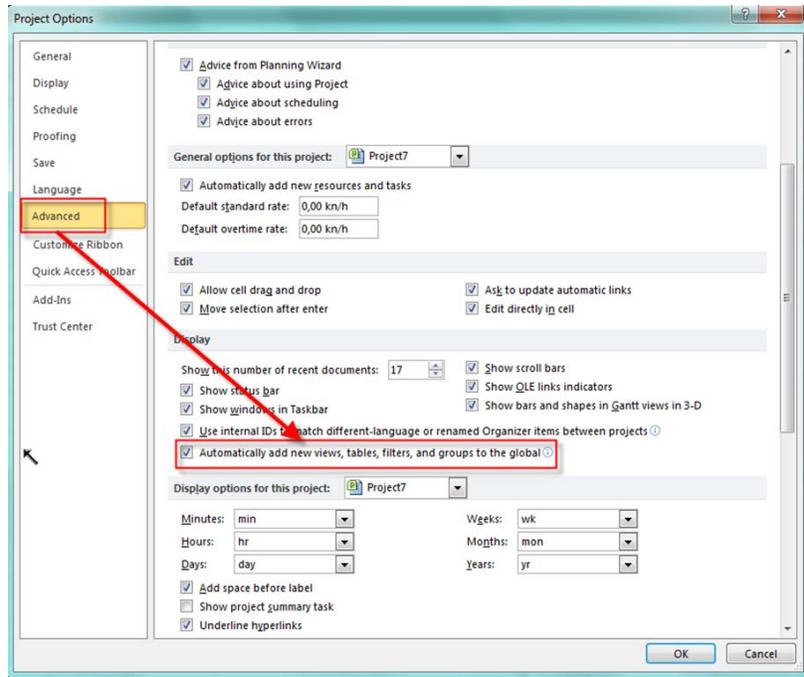
OOOPS! Guys I put *My Gantt Chart* instead of *My Gantt Chart*. I will change the name very simply:



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

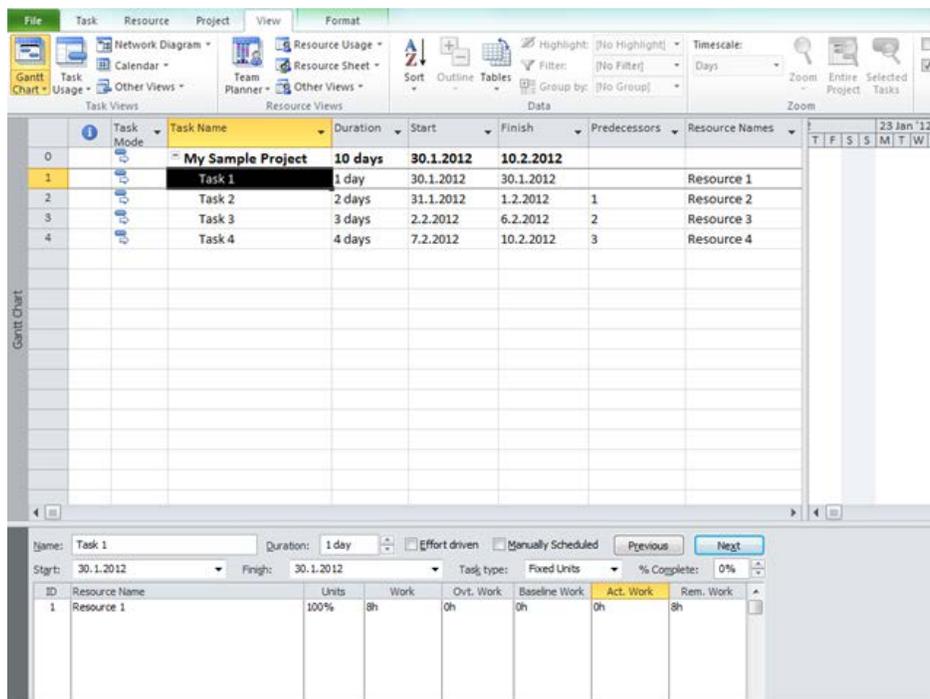


and:

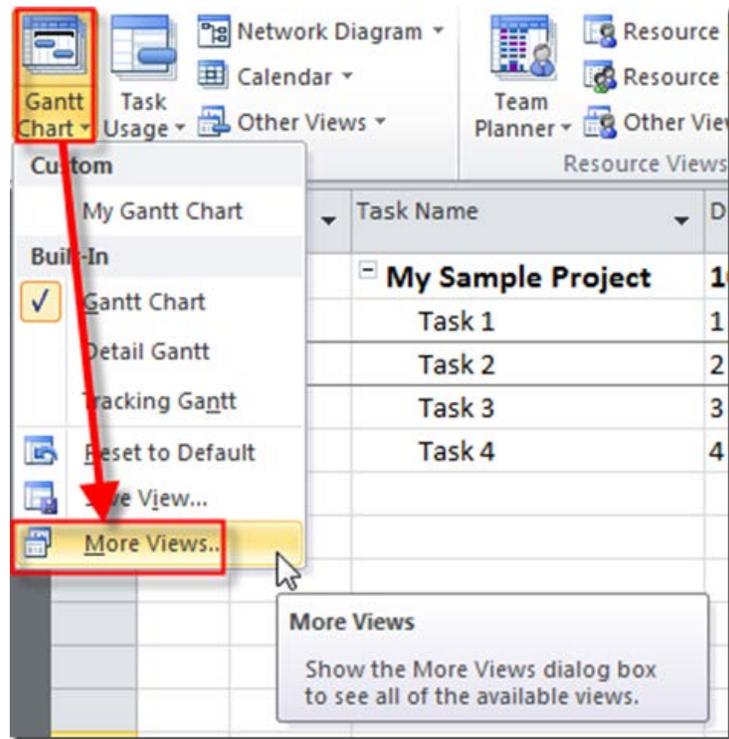


Notice that when *Automatically add new views, tables, filters, and groups to the global* is checked, any new view, table, etc. added in one project will reflect to all Projects in the future. If you want to make a custom View, Table, etc. only for current Project, remove this check mark!

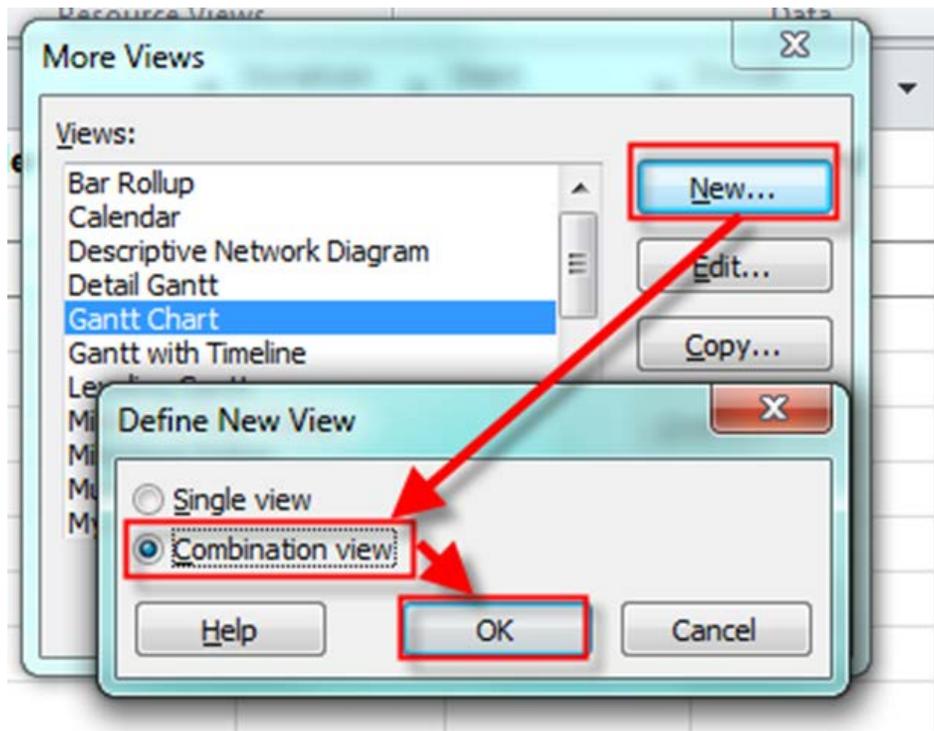
Notice there are two different types of View in **MS PROJECT 2010**: *Single View*, and *Combination View*. Example of Single View is *Gantt Chart*, and example of Combination View is *Task Entry*:



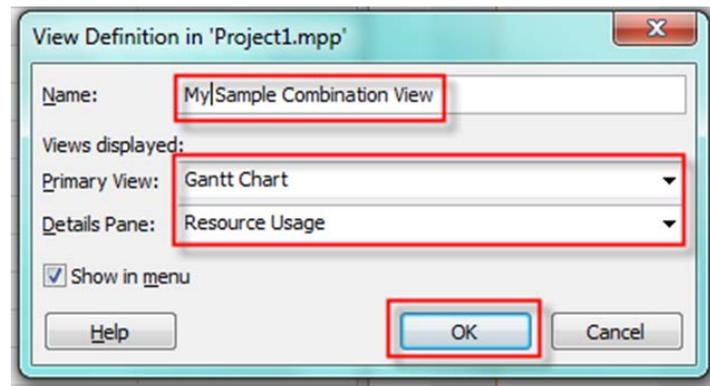
Now I will show how to create a Brand new View:



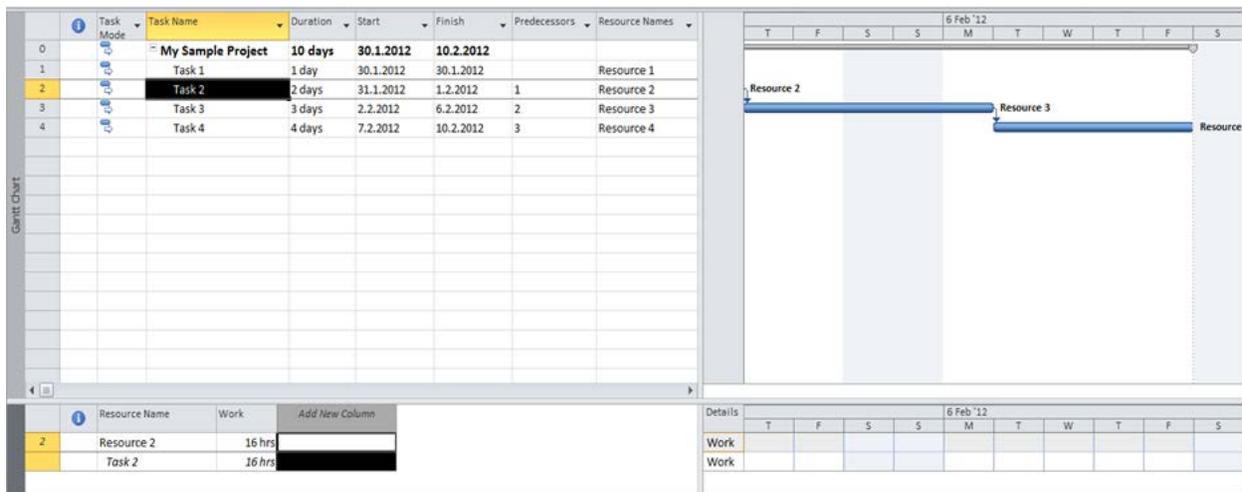
and then:



So, I will create the Combination View:



and I will get:

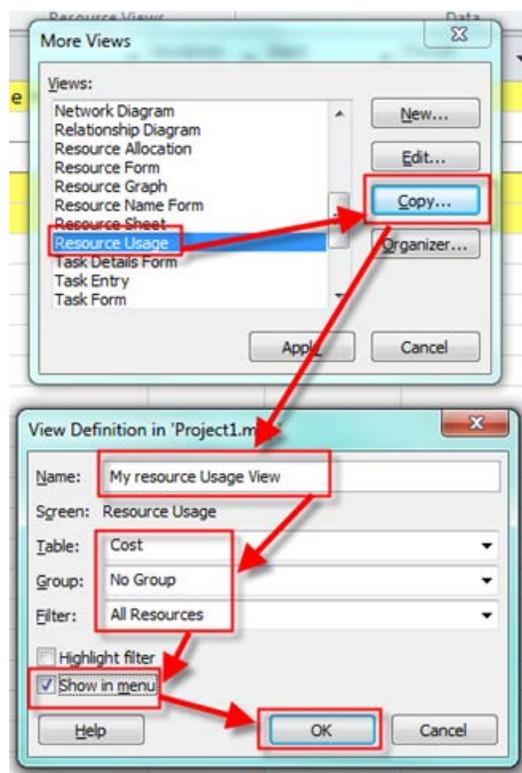


But what if I want that My Sample Combination View has customized portion.

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 |

I will make a custom *Resource Usage* View:



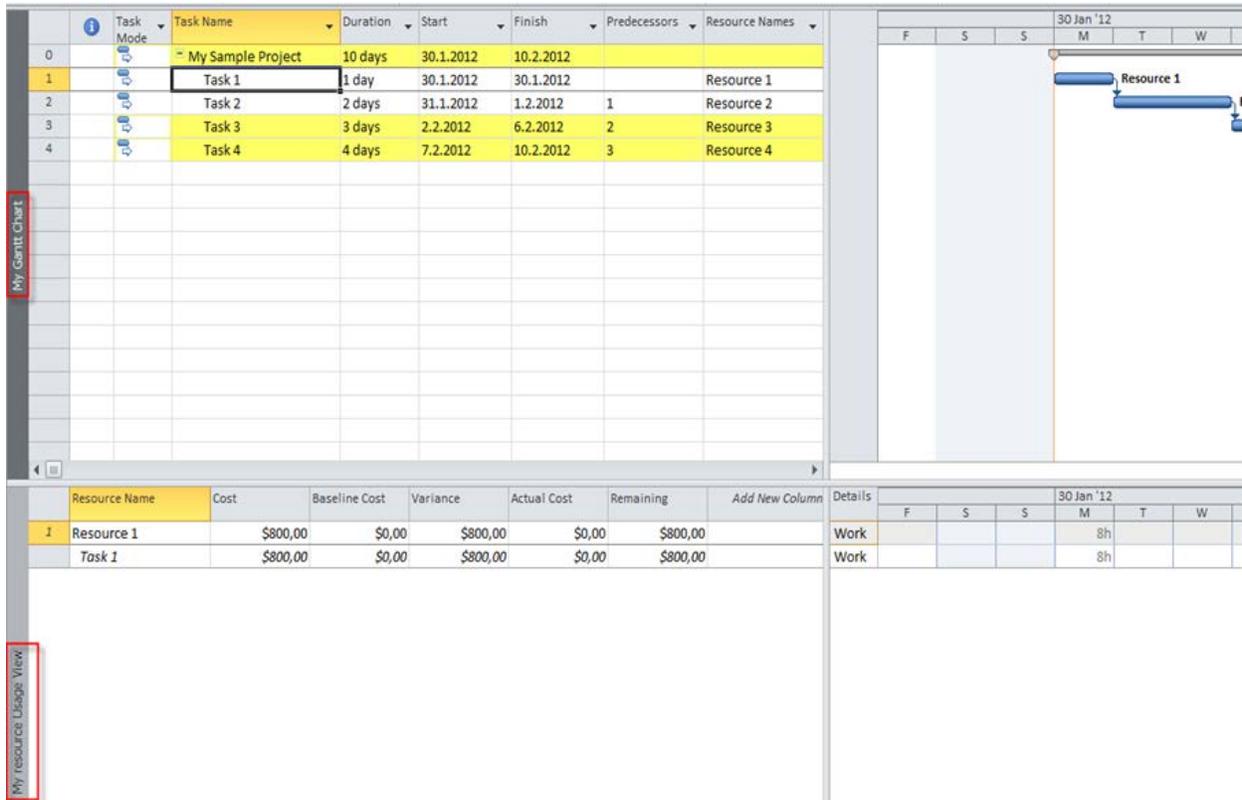
and I will get:

| Resource Name | Cost | Baseline Cost | Variance | Actual Cost | Remaining | Add New Column | Details | 30 Jan '12 | | | | | | | |
|---------------|------------|---------------|------------|-------------|------------|----------------|---------|------------|---|---|----|----|---|----|----|
| | | | | | | | | F | S | S | M | T | W | T | F |
| 1 Resource 1 | \$800,00 | \$0,00 | \$800,00 | \$0,00 | \$800,00 | | Work | | | | 8h | | | | |
| Task 1 | \$800,00 | \$0,00 | \$800,00 | \$0,00 | \$800,00 | | Work | | | | 8h | | | | |
| 2 Resource 2 | \$1.920,00 | \$0,00 | \$1.920,00 | \$0,00 | \$1.920,00 | | Work | | | | 8h | 8h | | | |
| Task 2 | \$1.920,00 | \$0,00 | \$1.920,00 | \$0,00 | \$1.920,00 | | Work | | | | 8h | 8h | | | |
| 3 Resource 3 | \$3.360,00 | \$0,00 | \$3.360,00 | \$0,00 | \$3.360,00 | | Work | | | | | | | 8h | 8h |
| Task 3 | \$3.360,00 | \$0,00 | \$3.360,00 | \$0,00 | \$3.360,00 | | Work | | | | | | | 8h | 8h |
| 4 Resource 4 | \$5.120,00 | \$0,00 | \$5.120,00 | \$0,00 | \$5.120,00 | | Work | | | | | | | | |
| Task 4 | \$5.120,00 | \$0,00 | \$5.120,00 | \$0,00 | \$5.120,00 | | Work | | | | | | | | |

Now I will change My Sample Combination View:

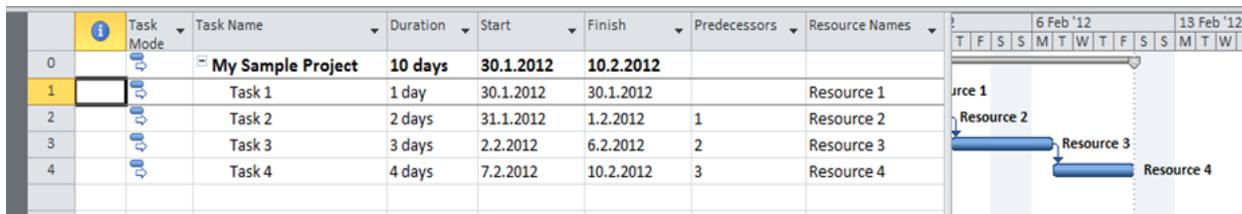
The image shows two dialog boxes from a project management software. The top dialog, 'More Views', lists various views including 'My Sample Combination View', which is highlighted. A red box is drawn around the 'Edit...' button, and a red arrow points from it to the bottom dialog. The bottom dialog, 'View Definition in Project1.mpp', shows the configuration for 'My Sample Combination View'. It has a 'Name' field with 'My Sample Combination View'. Under 'Views displayed', the 'Primary View' is set to 'My Gantt Chart' and the 'Details Pane' is set to 'My resource Usage View'. A red box is drawn around these two dropdown menus, and a red arrow points from the 'Edit...' button in the top dialog to this box. At the bottom of the dialog, the 'OK' button is also highlighted with a red box and a red arrow points to it from the 'Details Pane' dropdown.

and I will get:

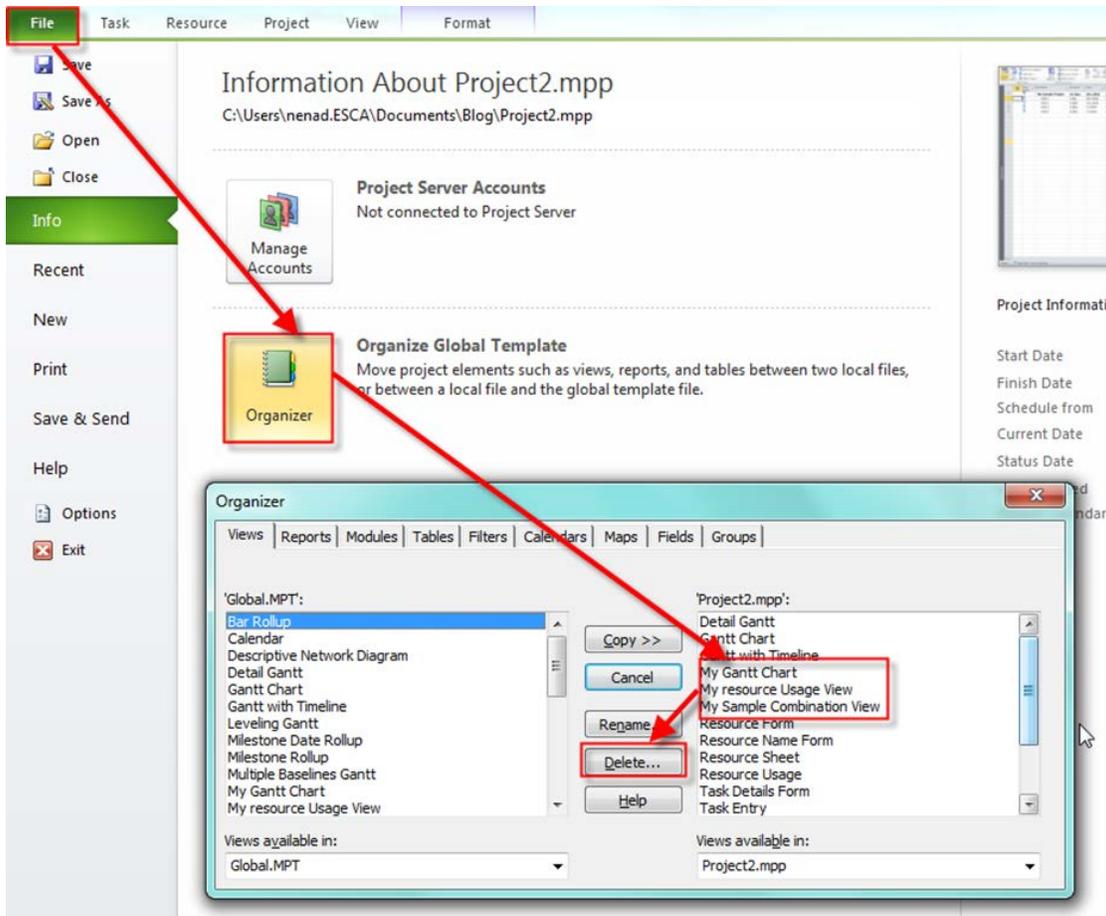


Notice that in my upper portion of the Screen I have *My Gantt Chart* with filter applied, and in the lower part of the Screen I have *My Resource Usage View* with the Cost Table applied.

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):

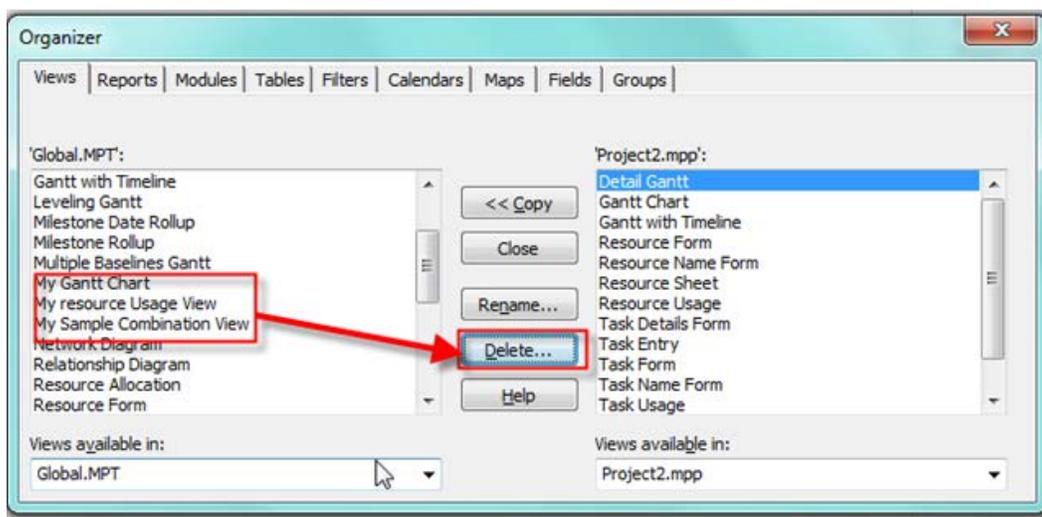


Now I am going to the *Organizer*:



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.