

Reviewing the task outline

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The tips and tricks below are taken from Project Mentor, the smart way to learn Microsoft Project. For further information, please go to:

www.projectlearning.net/project_mentor.htm

More useful tips and tricks can be found on the Project Learning blog:

www.projectknowledge.net

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Introduction

How many of us have created complex projects containing level upon level of detail?

It's likely that all Microsoft Project users will have created a number of complex projects that can often be difficult to interpret and manage. When this is the case, a few simple techniques can be used to correctly view and interpret the (often vital) information that passes up through a project's outline.

These tips and tricks describe how outline information can be expanded or collapsed, together with an explanation of how information is summated at both summary levels and the overall project level.

Background

Once a project's outline has been defined, and the tasks within it linked to one another, useful information can be gained from the summary tasks and the milestones within the plan. As project plans may contain dozens of summary tasks and literally hundreds of subtasks, reports (and the decisions that can be reached as a result of them) need not contain ALL the project's detail.

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Expanding and collapsing the outline

The most common outline-based view is the Gantt chart. The outline to the left of the view is sorted (by default) by ID, but retaining the project's outline structure. Thus, the primary sort is by the highest level summary task, then subheadings (lower level summaries) within it, and so on. Finally, nested at the lowest level of the Work Breakdown Structure are the normal tasks where all the work within the project will be performed. For example:

	Task Name	WBS
1	[-] High-level summary	1
2	[-] Lower-level summary	1.1
3	[-] Low-level summary	1.1.1
4	Normal task a	1.1.1.1
5	Normal task b	1.1.1.2
6	Normal task c	1.1.1.3
7	[-] Lower-level summary	1.2
8	[-] Low-level summary	1.2.1
9	Normal task x	1.2.1.1
10	Normal task y	1.2.1.2
11	Normal task z	1.2.1.3

- Specific summary task detail can be collapsed by clicking on the [-] icon beside the summary task's name:

7	[-] Lower-level summary	1.2
8	[-] Low-level summary	1.2.1
9	Normal task x	1.2.1.1
10	Normal task y	1.2.1.2
11	Normal task z	1.2.1.3

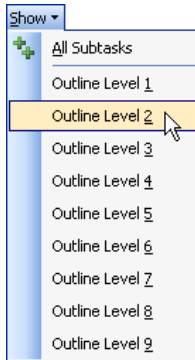
becomes:

7	[-] Lower-level summary	1.2
8	[+] Low-level summary	1.2.1

- To expand the summary, click on the [+] icon that now appears beside the summary task's name.

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To control the overall level of detail displayed, use the 'Show' drop down list:



becomes:

1	<input type="checkbox"/> High-level summary	1
2	<input checked="" type="checkbox"/> Lower-level summary	1.1
7	<input checked="" type="checkbox"/> Lower-level summary	1.2

Hints

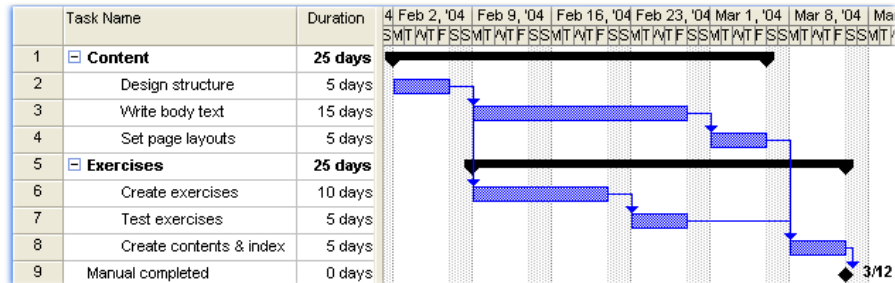
- The  button can also be used to collapse the outline, and  used to expand it.
- Use the drop down  All Subtasks within the Formatting Toolbar to display all levels of the outline.

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Information displayed by summary tasks

As their name implies, summary tasks are used to summarize the subtasks that make them up. As such, the summary task is useful for providing strategic information for the project's sponsor and other key stakeholders.

- It is drawn from the scheduled start of the earliest of its subtasks to the scheduled finish of the latest of its subtasks, its duration being the amount of working days from its earliest to its latest point:



In the example above:

- 'Content' has a duration of 25 days. This is simply calculated as the sum of the durations of its subtasks (5 days + 15 days + 5 days).
 - 'Exercises' has a duration of 25 days because it is 25 days from starting 'Create exercises' to finishing 'Create contents & index' (as 'Create contents & index' depends upon the completion of BOTH 'Set page layouts' AND 'Test exercises').
- Work values (both planned and actual) are rolled up from the subtasks to their respective summary tasks:

Task Name	Work
1 <input type="checkbox"/> Content	200 hrs
2 Design structure	40 hrs
3 Write body text	120 hrs
4 Set page layouts	40 hrs
5 <input type="checkbox"/> Exercises	160 hrs
6 Create exercises	80 hrs
7 Test exercises	40 hrs
8 Create contents & index	40 hrs
9 Manual completed	0 hrs

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- Cost values (both planned and actual) are rolled up from the subtasks to their respective summary tasks:

	Task Name	Total Cost
1	<input type="checkbox"/> Content	£5,000.00
2	Design structure	£1,000.00
3	Write body text	£3,000.00
4	Set page layouts	£1,000.00
5	<input type="checkbox"/> Exercises	£4,400.00
6	Create exercises	£2,400.00
7	Test exercises	£1,000.00
8	Create contents & index	£1,000.00
9	Manual completed	£0.00

Hints

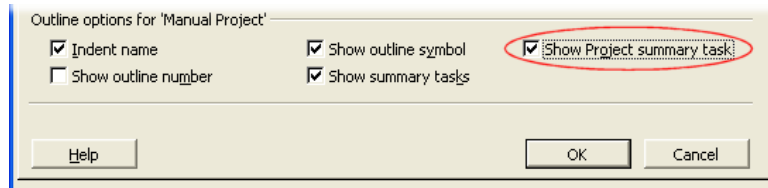
- Once a normal task becomes a summary task, its duration is no longer editable.
- If tasks are in progress, their percent complete values are rolled-up to their respective summary task.

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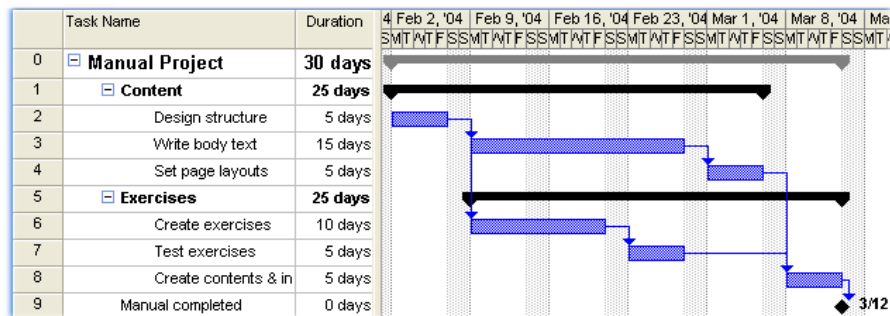
Displaying a project summary task

A project summary task represents the highest level of a project's outline. It's not really a task at all, but it is useful as it sums the whole work and cost values for the entire project. Its bar is drawn from the scheduled start of the earliest of its subtasks to the scheduled finish of the latest of its subtasks, thus encompassing the entire project's schedule. To display the project summary:

- From the Tools menu, choose Options.
- On the View tab, select the 'Show Project summary task' check box, then confirm with OK.



- The project summary task is displayed on row 0 of the outline as:



Hints

- The check box to select or clear the display of a project summary task can only be found within the View tab of the Options dialog box.
- The project summary task is identified by a grey bar style and its ID of 0.
- When a project summary task is displayed, check the 'Task Name' column's width as the task's names are now displayed with a greater level of indentation.

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Viewing project statistics

Displaying similar information to a project summary task, summary-level information for the entire project can be displayed as project statistics. To display these statistics:

- From the Project menu, choose Project Information.
 - Within the dialog box, choose **Statistics...**.
- General summary information is displayed for a project that hasn't started:

The screenshot shows a dialog box titled "Project Statistics for 'Manual Project'". It contains two tables and a progress indicator.

	Start	Finish
Current	Feb 2 '04	Mar 12 '04
Baseline	NA	NA
Actual	NA	NA
Variance	0 days	0 days

	Duration	Work	Cost
Current	30 days	240 hrs	10,500.00
Baseline	0 days?	0 hrs	0.00
Actual	0 days	0 hrs	0.00
Remaining	30 days	240 hrs	10,500.00

Percent complete: _____
Duration: 0% Work: 0%

Close

- If the project is in progress, additional baseline and variance data provides useful comparative information to determine if the project is meeting its project objectives. In the example below, the project is scheduled to finish five days late and also with its cost going overbudget.

The screenshot shows a dialog box titled "Project Statistics for 'Help Project'". It contains two tables and a progress indicator.


	Start	Finish
Current	Dec 1 '03	Jan 7 '04
Baseline	Dec 1 '03	Dec 30 '03
Actual	Dec 1 '03	NA
Variance	0d	5d

	Duration	Work	Cost
Current	25d	264h	11,240.00
Baseline	20d	240h	9,960.00
Actual	16.94d	184h	7,640.00
Remaining	8.06d	80h	3,600.00

Percent complete: _____
Duration: 68% Work: 70%

Close

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Hints	<ul style="list-style-type: none">• Use the  button from the Tracking toolbar as a shortcut to the project statistics• The 'Project Summary' report provides a hard-copy version of project statistics. It can be accessed by selecting the 'Overview' category after selecting Reports from the View menu.
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