

Customizing tables and filters

Understanding the concept of FIELD

Namely, the software offers 6 field possibilities:

1. Task fields
2. Task-time phased fields
3. Resource fields
4. Resource-time phased fields
5. Mapping fields
6. Assignment-time phased fields

For example...

A TASK FIELD contains data that is directly related to the task or deliverables.

	Task Name	Duración	Comienzo	Fin
0	• Desarrollo MyWay Software	75 d	6/1/2015	9/14/2015
1	• Análisis de Requerimientos	16 d	6/1/2015	6/22/2015
2	Realizar Análisis de Requerimientos	3.75 d	6/1/2015	6/4/2015
3	Realizar Especificaciones del Software	6 d	6/8/2015	6/15/2015
4	Desarrollar Presupuesto	1.8 d	6/15/2015	6/16/2015
5	Realizar Cronograma de Desarrollo	3 d	6/17/2015	6/22/2015
6	Fin Proceso de Análisis	0 d	6/22/2015	6/22/2015
7	• Diseño	13 d	6/23/2015	7/9/2015
8	Desarrollar Especificaciones Funcionales	9 d	6/23/2015	7/6/2015
9	Desarrollar Prototipo	3 d	7/7/2015	7/9/2015

For example...

A TASK-TIMEPHASED FIELD contains that data of the temporal distribution based on the duration of the task.

Nombre de tarea	Trabajo	Duración	may 31 '15						
			D	L	M	X	J	V	
0 • Desarrollo MyWay Software	499 h	75 d	Trab.	6h	6h	6h	6h	6h	
1 • Análisis de Requerimientos	66 h	16 d	Trab.	6h	6h	6h	6h	6h	
2 • Realizar Análisis de Requerimientos	24 h	3.75 d	Trab.	6h	6h	6h	6h	6h	
<i>Carmen Rojas</i>	24 h		Trab.	6h	6h	6h	6h	6h	
3 • Realizar Especificaciones del Software	24 h	6 d	Trab.						
<i>Andrés Cerdas</i>	24 h		Trab.						

For example...

An ASSIGNMENT FIELD contains data directly related to the assignment.

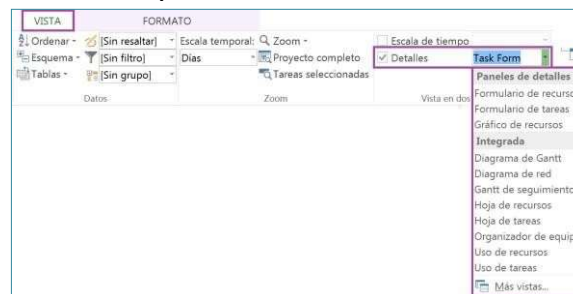
DIAGRAMA DE GANTT						
	Nombre de tarea	Duración	Comienzo	Fin	Predecesoras	Nombres de los recursos
0	Desarrollo MyWay Software	75 d	6/1/2015	9/14/2015		
1	Análisis de Requerimientos	16 d	6/1/2015	6/22/2015		
2	Realizar Análisis de Requerimientos	3.75 d	6/1/2015	6/4/2015		Carmen Rojas[75%]
3	Realizar Especificaciones del Software	6 d	6/8/2015	6/15/2015		2. Andrés Cerdas[63%]
4	Desarrollar Presupuesto	1.8 d	6/15/2015	6/16/2015		3. Carmen Rojas[75%]
5	Realizar Cronograma de Desarrollo	3 d	6/17/2015	6/22/2015		4. Andrés Cerdas[50%]

Nombre:	Desarrollar Presupuesto	Duración:	1.8 d	<input checked="" type="checkbox"/> C. por el esfuerzo	<input type="checkbox"/> Programada manualmente	Anterior	Siguiente
Comienzo:	6/15/2015	Fin:	6/16/2015	Tipo de tarea:	Unidades fijas	% completado:	100%

Id	Nombre del recurso	Unidades	Trabajo	Id	Nombre de la sucesora	Tipo	Retardo
3	Carmen Rojas	75%	10h	5	Realizar Cronograma de Desarrollo	FC	0d

Two-pane view

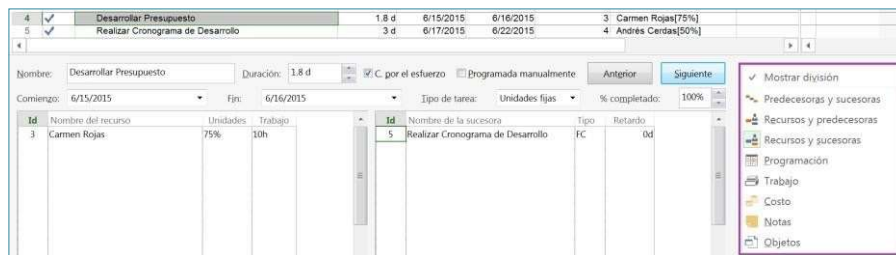
To separate the screen into two panes do the following: go to VISTA | View in two panes and check the 'Details' field. In the combo type field on the right, you can select different panels.



Two-pane view

If you choose the task form, the information related to the currently selected task is displayed. when you right-click on the form region a window appears with different options to deploy.

Two-pane view



The screenshot displays a software interface for task management. At the top, a task list shows two tasks: 'Desarrollar Presupuesto' (1.8 d, 6/15/2015 - 6/16/2015, 3 Carmen Rojas[75%]) and 'Realizar Cronograma de Desarrollo' (3 d, 6/17/2015 - 6/22/2015, 4 Andres Centas[50%]). Below this, the 'Desarrollar Presupuesto' task form is open, showing details like 'Nombre: Desarrollar Presupuesto', 'Duración: 1.8 d', and 'Comienzo: 6/15/2015'. A context menu is open on the right side of the form, listing options such as 'Mostrar división', 'Predecesoras y sucesoras', 'Recursos y predecesoras', 'Recursos y sucesoras', 'Programación', 'Trabajo', 'Costo', 'Notas', and 'Objetos'.

Id	Nombre del recurso	Unidades	Trabajo	Id	Nombre de la sucesora	Tipo	Retardo
3	Carmen Rojas	75%	10h	5	Realizar Cronograma de Desarrollo	FC	0d

Understanding the concept of FIELD in views, tables, filters, and groups

Project contains a variety of clearly defined views, tables, filters, and groups (included in the Organizer window).

- A **Table** is a set of fields (columns).
- A **Filter** shows you a specific extract of information.
- A **Group** is an organized set of data.

Understanding the concept of FIELD in views, tables, filters and groups

- Finally, we have the 'Screen', which is the graphic or timephased type format.
- The view is a combination of the previous items:

View = Table + Filter + Group + Screen

Organize and format project details

- After the creation of a Project Plan, there is the possibility that you want to examine specific details, both to carry out your own analysis and to share it with the rest of the Interested Parties.

Organize and format project details

- Although project 2019's own views, tables, and reports represent an option for visualizing data, you might want to organize it under some of your own criteria or characteristics.

Sort project data

- **Sorting** data is the easiest way to rearrange task or resource data in Project. They can be sorted according to predefined criteria, or they can create their own sort order with a maximum of three levels.

Sort project data

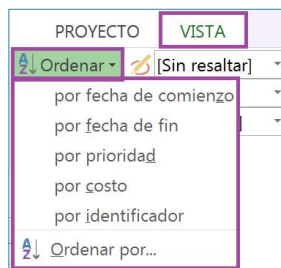
To activate the sort function:

- Select | VIEW | data Sort.



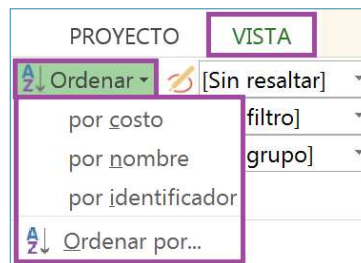
Sort project data

- It has default to sort the tasks by: Start Date, End Date, Priority, Cost and Identifier.



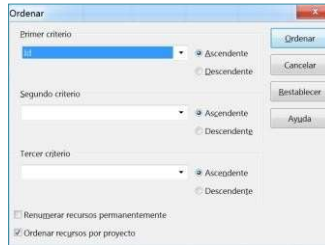
Sort project data

- It has default to sort the resources by: Cost, Name and Identifier.



Sort project data

- Other criteria can be set by selecting the 'Sort by...' option, located at the end of the 'Sort' options:

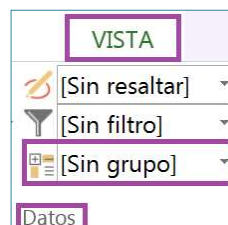


Group project data

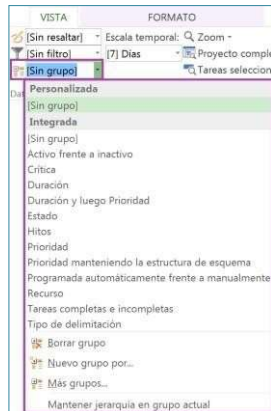
- Grouping allows you to organize information about tasks or resources according to the criteria you choose.
- Groupings can significantly change the way task and resource data is presented.
- Project 2019 includes several predefined groups of tasks and resources.

To group the data in the selected view, do the following:

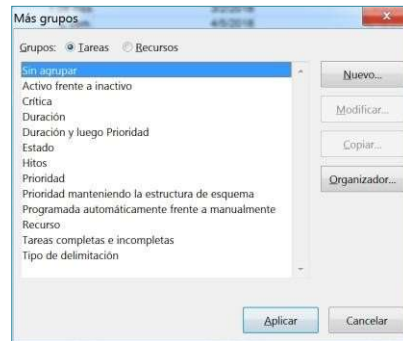
Go to | VIEW Data and select the combo type field 'Group by:'.



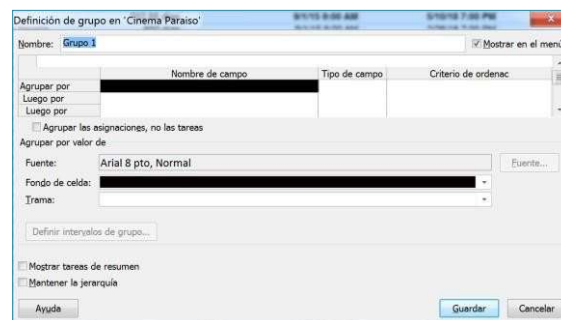
Group project data



By selecting 'More groups...' we arrive at:



By selecting 'New...' in 'More groups...' we can customize a new grouping:



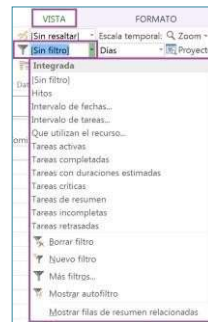
Filter project data

- Filtering involves hiding the data of tasks or resources that do not meet specific criteria, thus showing only those data that you want to see at a specific time.
- There are two ways to view 'Filters', so *default* or by applying the *autofilter*.

Filter project data

To filter the data in the selected view, do the following:

Go to | VIEW Data and select the combo type field 'Filter'.



Customize views

- Virtually all project 2019 work shows through views.
- Remember that a View contains elements such as: tables, groups, filters, text elements and graphics.
- But you have the option to *customize a table* based on your requirements.