Project Management

User Guide

Planview ChangePoint 2022

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1. Project Management Introduction

About project management

After a contract is created for a customer, you can create projects for the contract. The approval rules for projects for customers are defined in contracts.

You use projects to define and track work that is being done for a customer or a contract. You can set up projects as billable or nonbillable. The progress of a project is tracked through tasks that define the project work. You assign tasks to resources, and the resources enter their time and expenses for the tasks into ChangePoint.

You can group related tasks under summary tasks and create dependencies between tasks. If a project is large or complex, you can divide it into subprojects. Each project can support up to 20 levels of tasks and subprojects. These levels are displayed in the **Projects** tree view.

When you no longer require the project to be available in ChangePoint, you can archive the project data.

About project resources

The typical resources that work with projects are the following:

- Project manager – has full edit access to the project and its tasks. The project manager is specified on the project profile. There can only be one project manager for a project at a time.
- Project plan editors – can edit existing project tasks and can view the project dialog box but cannot edit the project profile. Project plan editors are granted access to the project by the project manager. The project manager can also specify whether project plan editors can create and delete project tasks, save project baselines, and take over the project to become the project manager.
- Summary task managers – can view the summary tasks and subtasks under the summary tasks that they have been assigned to. The project manager can also specify whether summary task managers can create, edit and delete the subtasks under their summary tasks.
- Resources assigned to project tasks – can view and update the status of the tasks that they have been assigned to.

About resource leveling

If resource leveling is enabled for your ChangePoint installation, all entries that affect task assignments are validated. If the task assignments will result in a resource being overbooked, a validation report displays a list of the affected task assignments.

Depending on how the staffing workgroup for the contract that is associated with the project has been configured, the validation report will contain either warnings or failures:

- If the validation report contains warnings, then you can choose either to accept the warning and save the task assignment or cancel the task assignment.
- If the validation report contains failures, the task assignment cannot be saved.

About soft-bookings

Soft-bookings are tentative bookings of resources for planning purposes. Soft-booked time is shown as flexible on the resource schedule calendar. Available for task assignments, project team entries, request demand items, projected resources and calendar entries.

If resource request workflow is not used and soft-booking is allowed, resource request initiators determine whether a resource is soft-booked at the time they create the resource request.

If resource request workflow is used and soft-booking is allowed:

- Resource requests created by non-resource managers are treated as soft-bookings until they are approved by the resource manager.
- When a resource request is approved, the booking changes to hard-booked and the resource is committed for the duration of the request.

Resource managers can directly hard-book resources. The default setting for contracts and projects is soft-booked, and for tasks it is hard-booked.

2. Creating Projects

About methods for creating projects

The following methods for creating a project are available:

- Create project – you can create a detailed project plan, and the related tasks, and task assignments. The related customer, contract, and billing office must already exist. For more information, see "Creating a project" on page 18.
- Copy an existing project – you can use an existing project as a template to create a project or a project and its tasks. For more information, see "About copying projects" on page 41.

Accessing a project

1. Click **Projects**.

   The **Projects** list view appears.

2. To view a list of projects for which you are the project manager, change the view to **My projects**.
3. To access the **Projects** tree view, click **Tree view**.
4. Select the project.

   The project profile appears.

About the noneditable sections in the project profile

The project profile contains the following sections that cannot be edited:

- **Record information** – displays information about when the project was created and by whom, and when the project was last updated.
- **Fiscal year breakdown** – displays the planned, actual and remaining hours for the project distributed across the fiscal years that the project covers. This section displays only if fiscal periods have been specified for the project.
- **Portfolio memberships** – displays only if the project is part of a portfolio. You can click the portfolio names to view the portfolios.

- **Project dependencies** – displays all of the information related to both predecessor and successor tasks.

Icons in the Projects tree view

The following table describes the project icons that display in the project tree view.

	Blue project icon indicates that you are the project manager for the project.
	Gray project icon indicates that you have view access to the project.
	Microsoft Project icon indicates that the project is linked to a Microsoft Project project.

About creating projects

After customers and contracts have been created, you can create your project, add tasks and assign resources. All projects in ChangePoint are associated with a contract.

You can create a project using the **New** option or from an entity (contract, customer, opportunity or request) profile. When you create a project from an entity profile, the entity-related information is automatically added to the project.

You can create a project by completing only the following fields and then saving the project:

- **Project**
- **Customer**
- **Contract**

You can then enter the rest of the information for the project in stages.

The following fields are required, but because they have default values, you do not have to enter values for them:

- **Planned start**
- **Planned finish**
- **Planned hours**
- **First status** (required only if **Status required** is selected in the **Project type** field)

You can enter values for the planned fields when you create the project, but the actual values based on the project data can be determined by rolling up the project after the tasks have been added.

About project statuses

The project status affects all of the tasks related to the project, and controls the project-related functionality that resources are able to perform.

The following table lists the standard project statuses and descriptions of how the statuses can be changed in the workflow.

Status	Description
Draft	The project is under revision. Only the project manager has access to the project profile while it is in **Draft** status. Assigned resources cannot view the project, update the status of project tasks, or enter time and expenses. When you create a new project, it is in **Draft** status. **Draft** can be changed to any other status.
Active	The project is in progress. Only the project manager can edit the project profile and tasks. All other resources can access the project and its tasks and enter time and expenses according to their access rights. **Active** can be changed to **Completed** or **Inactive**.
Completed	The project has been completed. When status is changed to **Completed**: • all associated tasks are marked as **Completed** and are locked • Resources cannot enter project expenses or time for project tasks. • actual finish date is calculated **Completed** status can be changed to **Active** or **Inactive**.
Inactive	The project is suspended. Resources cannot enter project expenses, or time against project tasks until the status is changed back to **Active**. Inactive can be changed to **Active** or **Completed**.

About project phases

Project phases represent the stages in a project's life cycle. When you create tasks, you can specify the project phase in which the work should be done. When a project is rolled up, the current project phase is based on the latest phase of the tasks that have actual hours recorded, and is displayed in the **Project phase** field on the project profile.

> **Note:** The **Project phase** field displays on the project profile only after the project is rolled up.

If the project includes summary tasks, the project phase is based on the summary task and not its subtasks. As a best practice, you should ensure that either all tasks under a summary task have the same project phase as the summary task, or that no phase is specified (provided that project phases are not mandatory). If no project phase is specified for the summary task, then the project phase of its subtasks is taken into consideration.

The **Proposed phase** field on the project profile displays the phase that the project is working towards. If project workflow is enabled, the field displays the workflow step that is currently in progress. By comparing the proposed phase with the actual phase, you can see if work is occurring within a phase that has not yet been approved to start.

About task status updates

Status updates for project tasks can be mandatory or not required:

- **Status required** – Resources must update the status of their assigned tasks. However, you can remove the status requirement for specific tasks and task assignments if necessary.
- **Status not required** – Resources are not required to update the status on their assigned tasks. You cannot specify that certain tasks require status updates. Therefore, if you require updates on any tasks in your project, you must select the **Status required** project type when setting up your project.

For task assignments that do not require status updates:

- Only the project manager, project plan editor, or the resource who is assigned to the task can specify when the task is completed. Rolling up a project does not automatically set the task assignments as complete.
- When a project is rolled up, the remaining hours are calculated as:

  planned hours – actual hours

If the actual hours are greater than or equal to the planned hours, the remaining hours are set to 1. The percentage complete is calculated as follows:

actual hours/(actual hours + remaining hours).

About using fiscal periods on projects

If you want to use fiscal periods on a project, you must add them before you create tasks and task assignments.

When you add fiscal periods to a project, the planned effort is recalculated using a specific default loading method and can result in changes to planned hours totals and allocations. Also, you cannot edit dates and planned hours in past fiscal periods.

About restricting time entry for projects

You can restrict resources to entering time only when the time entry complies with one or both of the following conditions:

- date of the time entry is within the planned start and planned finish dates of the project, task or task assignment
- total amount of time entered for the task or task assignment is within the total planned effort of the project, task or task assignment

You can set default settings for the time entry restrictions on the following entities:

- billing offices – for projects for the billing office contracts
- projects – for the tasks and task assignments for the project
- tasks – for the task assignments for the task

The default settings are automatically applied to new entities, but can be overridden on individual projects, tasks, and task assignments. The options selected on task assignments take priority over task settings, which take priority over the project settings.

About setting or changing time entry restrictions when there are existing projects

The time entry restriction settings are not automatically applied to projects, tasks, and task assignments that exist when you enable or change the settings. Therefore you must manually apply the settings to existing entities as follows:

- To restrict time entries based on project planned data, enable the setting on each project.

- To restrict time entries based on task planned data, enable the setting on each task.
- To restrict time entries based on task assignment planned data, enable the setting on each task assignment.

You can specify time entry restriction settings for tasks and task assignments on projects as well as in Project Worksheet and the task editing view.

Creating a project

1. Click **Projects**. The **Projects** list view appears.
2. Click > **Project**. The **Create Project** dialog box appears.
3. In the **General** tab, complete the fields as required. For more information, see "Create/Edit Project dialog, General tab options" on page 18.
4. Click **Save**. The project is created.
5. To complete the project, see the following topics:
   - "Entering budget information for a project" on page 20
   - "Specifying time approvers for a project" on page 22
   - "Specifying a work location and work code for a project" on page 24
   - "Allowing resources to submit project expenses" on page 30
   - "About granting access to projects" on page 26
   - "Associating a project to a product" on page 31

Create/Edit Project dialog, General tab options

Field	Description
Project field	Name of the project.
Alternate name field	Specifies the alternate name for the project. Typically used to display the project name in a different language
Customer type-ahead field	Customers for which the project is being created.

Field	Description
Contract list	Contract for which the project is being created.
Planned start field	Start date for the project.
Planned finish field	Finish date for the project.
Planned hours field	Planned hours for the project.
Status list	Overall status of the project.
Proposed phase list	Project phase that the project is currently working towards. If project workflow is enabled, the field displays the state in the current workflow process.
Project ID field	ID for the project. Depending on the organization, the project ID may be automatically assigned by the system.
Billable project check box	When selected, specifies that the project is billable.
Time-based project check box	When selected, specifies that the project tasks are time-based and will be assigned to resources using Service Scheduler.
Project contact list	Contact from the customer that is associated to the project.
Billing contact list	Contact to whom the invoices will be sent.
Project type list	Option that specifies whether resources must update the status of their assigned tasks. Options are: • **Status required** • **Status not required**
First status date field	Date that resources must start updating the status of their assigned tasks, if the project type is set to **Status required**.
Status every [ ] weeks field	Frequency in weeks that resources are required to enter a status update for their assigned tasks.

Field	Description
CP project type list	Custom project type that allows the project to be categorized within ChangePoint.
Fiscal period type-ahead field	Billing office whose fiscal periods apply to the project.
Cost center type-ahead field	Cost center that is associated with the project. The cost center determines the burden rate that applies to cost rates for budgeted services, when specific resources are not selected.
Work performed for type-ahead field	Customers for which the work is performed, as specified in the associated contract.
Opportunity type-ahead field	Opportunity to associate to the project
Request field	Read-only. Number of the request from which the project was created, if applicable.
View in Client Portal check box	When selected, Client Portal users can view the project and its tasks, and create requests for the project.
Display MSP WBS in tree view check box	When selected, displays the Microsoft Project work breakdown structure (WBS) number for a task before the task name in the **Projects** tree view.
Calculate critical path check box	When selected, critical path is calculated for the project.
Send updates to ProjectPlace check box	When selected, updates made in ChangePoint are sent to ProjectPlace. Available only when the ChangePoint-ProjectPlace Connector connector is enabled.
Description field	Description of the project.

Entering budget information for a project

The budget information that you enter here is for information purposes only and is displayed in the **Budget information** section of the project profile. To estimate and track the labor,

material and expenses required to perform the work defined in the project, you can create a project-specific budget.

1. Access the project.
2. Click ⋮ > **Edit**.

   The **Edit Project** dialog box appears.
3. Click the **Budget and approval information** tab.
4. Complete the fields as required. For more information, see "Create/Edit Project dialog, Budget and approval information tab options" on page 23.
5. Click **Save**.

About specifying time approvers for projects

By default, the time approver specified for a resource in user setup approves all time for a resource. However, if a time approver has been specified for a contract, then the time approver approves time for all projects under the contract.

If a contract is configured to allow time approval on projects, you can also enable time approval and specify a time approver for individual projects under the contract. In this case, the specified project time approver approves the project time, followed by the contract approver. If a project time approver is not specified, then the resource approver approves the time, followed by the contract approver.

If a time approver is not specified for the contract, then the project time is approved by the project time approver only.

The following table shows the time approvers when time approvers are specified on more than one entity.

Contract Time Approver	Project Time Approver	Resource Time Approver	Time entry approvers
Specified	Specified	Specified or not specified	The project time approver, then the contract time approver.

Contract Time Approver	Project Time Approver	Resource Time Approver	Time entry approvers
Not specified	Specified	Specified or not specified	The project time approver.
Specified	Not specified	Specified	If time approval is enabled for the project: the resource time approver, then the contract time approver If time approval is *not* enabled for the project: the contract time approver.

Specifying time approvers for a project

1. Access the project.
2. Click ⋮ > **Edit**.

   The **Edit Project** dialog box appears.
3. Click the **Budget and approval information** tab.
4. Complete the fields as required. For more information, see "Create/Edit Project dialog, Budget and approval information tab options" on page 23.
5. Click **Save**.

Setting default time entry restrictions for a project

The time entry restrictions that you specify for a project are the default settings for the tasks and/or task assignments for the project.

1. Access the project for editing
2. Click the **Budget and approval information** tab.
3. To prevent resources from entering time entries that are not within the planned dates for the project, task, and/or task assignment, in the **Restrict time entries to within the planned dates for** option, select the applicable entity check boxes.

4. To prevent resources from entering time entries when the planned effort for the project, task, and/or task assignment is exceeded, in the **Restrict time entries to within the planned effort for** option, select the applicable entity check boxes.
5. Click **Save**.

Create/Edit Project dialog, Budget and approval information tab options

Field	Description
Labor field	Proposed labor budget for the project.
Expenses field	Proposed reimbursable expense budget for the project.
Other expense field	Proposed budget for other expenses for the project.
Project value field	Value of, and currency for, the project. The project value is one of the search criteria for resources.
Enable project time approval check box	When selected, the time worked on the project must be approved at the project level.
Time approver field	Resource who approves the time submitted for the project.
Secondary time approver field	Resource who approves the time that the time approver submits.
GL accounts for time section	
Credit GL account list	Credit account for revenue realized on billable time. This field is available only if you select a revenue recognition method for time.
Debit GL account list	Debit account for revenue realized on billable time. This field is available only if you select a revenue recognition method for time.
Time entry restrictions section	

Field	Description
Restrict time entries to within the planned dates for [project, task, task assignment] check boxes	Prevents resources from entering time for dates that are outside of the planned start and planned finish dates of the selected option. (project, task, task assignment).
Restrict time entries to within the planned effort for [project, task, task assignment] check boxes	Prevents resources from entering time when the total time entered for the selected option exceeds the planned effort.

About specifying work locations and work codes for a project

Work locations and work codes are required to assign the correct taxation information when invoicing the customer. Work locations specify where the work is performed, and work codes specify the type of work.

The work locations and codes for a project come from the associated contract. However, you can specify different work locations and work codes or change the default ones for the project. The default work location and work code display on all time and expense records for the project.

You can allow resources to change the work location on time and expense entries. You can also allow resources to select a work location that has not been specified for the project. The system administrator can set up an email notification to let you (the project manager) know when expenses are being entered for a location that is not specified on the project.

If work locations or work codes are changed or removed from the contract, they display in red. They are still available to select at another time.

Specifying a work location and work code for a project

1. Access the project.
2. Click ⋮ > **Edit**.

   The **Edit Project** dialog box appears.
3. Click the **Work locations/work codes** tab.
4. In the **Selected work locations** list, expand the tree view and select the work location.
5. To change the default work location:

   a. Right-click a work location.

   b. Select **Set as default**.

6. To allow resources to select a different work location for expenses, select the **Allow expense location override** check box.

7. To allow resources to choose a work location that is not in the **Selected work locations** list for an expense, select the **Allow non-project locations** check box.

8. In the **Selected work codes** list, expand the tree view and select the work codes.

9. To change the default work code:

   a. Right-click a work code.

   b. Select **Set as default**.

10. Click **Save**.

Setting up split billing for a project

You select customers and specify the percentage that each customer will be invoiced. You can either specify the percentage manually as you select each customer, or select all of the customers first and then select the option to automatically split the billing amount evenly between the customers.

1. Access the project for editing.

   The **Edit Project** dialog box appears.

2. Click the **Split billing** tab.

3. To specify a customer:

   a. Right-click in the table, and then select **Insert**.

   b. In the **Customer** type-ahead field, select the customer.

4. To add the customers that have already been for the contract, right-click in the table and select **Load contract split billing**.

5. To specify the percentage, do one of the following:

   - To specify the percentage manually, enter the value in the **Percentage** field.

- To split the billing evenly between all customers, right-click in the table and select **Auto-split**.

6. Click **Save**.

About granting access to projects

As project manager, you automatically have access rights to view and edit all aspects of the project.

However, you can manage the access for other resources. For more information, see the following:

- "Granting a resource view access to a project" on page 26
- "Removing view access restrictions to project requests" on page 27
- "Specifying access for project plan editors" on page 27
- "Granting access to summary task managers" on page 28
- "Granting access to subprojects" on page 29
- "Allowing resources to save baselines" on page 29
- "Allowing resources to submit project expenses" on page 30

Granting a resource view access to a project

When you grant view access to a project to a resource, the resource can view the project and all of its tasks.

1. Access the project.
2. Click ⋮ > **Edit**.

   The **Edit Project** dialog box appears.

3. Click the **Access** tab.
4. In the **View project** list, select the resources.

   Tip: To add resources to the **View project** list, and optionally to your preferred resources, right-click in the list and then select **Manage Resources**.

5. Click **Save**.

Removing view access restrictions to project requests

If system-wide restrictions for viewing requests have been set up by your organization, only the resources that have been granted specific access to a project can view the project requests. However, you can remove the restrictions for a project.

If system-wide restrictions have not been set up, you cannot add access restrictions to a project.

1. Access the project.
2. Click ⋮ > **Edit**.

   The **Edit Project** dialog box appears.
3. Click the **Access** tab.
4. In the **Request access** section, select the **Disable view access restrictions for viewing all requests under this project** check box.
5. Click **Save**.

About specifying access for project plan editors

You can designate resources as project plan editors for a project. Only resources who have the security access to manage tasks are available as potential project plan editors. By default, project plan editors can only view and edit project tasks. However, you can set additional options to allow them to also create and delete project tasks, assign summary tasks, and take ownership of the project.

You can remove project plan editor access from resources at any time, except for the default project plan editors.

Specifying access for project plan editors

1. Access the project.
2. Click ⋮ > **Edit**.

   The **Edit Project** dialog box appears.
3. Click the **Access** tab.
4. In the **Edit project plan** list, select the resources to be project plan editors for your project.

Tip: To add resources to the **Edit project plan** list, and optionally to your preferred resources, right-click in the list and then select **Manage Resources**.

5. In the **Project plan editor access** section, do the following:
   - To allow project plan editors to assign summary tasks to resources, select the **Allow to assign summary tasks** check box.
   - To allow project plan editors to create new tasks for the project, select the **Allow to create new tasks** check box.
   - To allow project plan editors to delete tasks from project, select the **Allow to delete tasks** check box.
   - To allow project plan editors to take ownership of the project, select the **Allow to take ownership of the project** check box.
6. Click **Save**.

Granting access to summary task managers

A summary task manager is a resource who has been assigned to a summary task for the project. You can set options to allow summary task managers to create, edit and/or delete the subtasks under their assigned summary tasks.

1. Access the project.
2. Click ⋮ > **Edit**.

   The **Edit Project** dialog box appears.
3. Click the **Access** tab.
4. In the **Summary task manager access** section, do the following:
   - To allow summary task managers to edit the subtasks under the summary tasks to which they are assigned, select the **Allow to edit tasks** check box.
   - To allow summary task managers to add new tasks under the summary task, select the **Allow to add new tasks** check box.
   - To allow summary task managers to delete subtasks associated with the summary task, select the **Allow to delete tasks** check box.
5. Click **Save**.

Granting access to subprojects

1. Access the project.
2. Click ⋮ > **Edit**.

   The **Edit Project** dialog box appears.
3. Click the **Access** tab.
4. In the **Subproject settings** section, do the following:
   - To allow resources to create a subproject under the project, select the **Allow subprojects to be created** check box.
   - To automatically make the project manager a project plan editor for all subprojects, select the **Allow the project manager complete access to all subprojects** check box.
   - To display all subprojects in the **Projects** tree view, select the **Display subprojects in the project tree view** check box. If this check box is cleared, only the project manager of the subproject can view it in the tree view only.
   - To have planned start, planned finish and planned hours roll up from subprojects to the parent project task when the project is rolled up, select the **Roll up planned information from subprojects to parent task** check box.
5. Click **Save**.

Allowing resources to save baselines

You can control whether project plan editors and summary task managers can save baselines. You can also give resources the option to save a baseline for a task with or without affecting higher-level tasks. For more information, see "About saving a task baseline without affecting higher level tasks" on page 70.

1. Access the project.
2. Click ⋮ > **Edit**.

   The **Edit Project** dialog box appears.
3. Click the **Access** tab.
4. In the **Baseline settings** section, do the following:

- To allow project plan editors to save baselines for the project, select the **Allow project plan editors to save baselines** check box.
- To allow summary task managers to save baselines for their summary tasks and subtasks, select the **Allow summary task managers to save baselines** check box.
- To give resources the option to save baselines without affecting higher-level tasks, select the **Allow users to save task baselines without affecting higher-level tasks** check box.

5. Click **Save**.

Allowing resources to submit project expenses

You can allow all of the resources who are assigned to project tasks to submit expenses for the project. You can also allow:

- individual resources to submit expenses even if they are not assigned to any project tasks
- all resources who are assigned to the project to override the billable status on expenses, even if the expenses for the project are billable

The **Expense only users list** includes your preferred resources who have access rights to create expenses. If resource requests are enabled at the project level, then list also includes the resources from the project team who have access rights to create expenses.

1. Access the project.
2. Click ⋮ > **Edit**.

   The **Edit Project** dialog box appears.
3. Click the **Expense access** tab.
4. To allow resources to submit expenses even if they are not assigned to any project tasks, select the resources in the **Expense only users** list.

   Tip: To add resources to the **Expense only users** list, and optionally to your preferred resources, right-click in the list and then select **Manage Resources**.
5. To prevent all of the resources who are assigned to the project from submitting expenses, clear the **Allow resource with task assignments to enter expenses** check box.

6. To allow all of the resources who are assigned to the project to override the billable status for a particular expense, select the **Allow users to override the [Billable] status on expenses entered for this project** check box.
7. Click **Save**.

Associating a project to a product

You can associate projects to the products for which the work is being done. When you associate a project to a product, all of the project tasks are automatically associated with the product. You can also associate individual tasks in the same project to different products. For more information, see "Associating a task to a product" on page 58.

The first product you select is marked as the primary product and is used for reporting purposes.

1. Access the project.
2. Click ⋮ > **Edit**.

   The **Edit Project** dialog box appears.
3. Click the **Products** tab.
4. In the **Products** list:
   a. Expand the tree view and select the primary product associated with the project.
   b. Select additional products, as required.
5. To change the primary product, click the name of the product instead of the check box.
6. Click **Save**.

Removing the association between a project and a product

1. Access the project.
2. Click ⋮ > **Edit**.

   The **Edit Project** dialog box appears.
3. Click the **Products** tab.

4. To remove the association to a primary product, you must first select a different primary product by clicking the name of the product instead of the check box.
5. Clear the check box for the primary product.
6. Click **Save**.

About creating subprojects

You can create subprojects when you require a more complex project structure. Subprojects appear the same as projects in all tree views.

By default, only the project manager of the subproject can view it in the **Projects** tree view. To allow all resources who have access to the project to view the subproject, you must select the option for displaying subprojects on the parent project.

Creating a subproject

You must create a subproject from the profile of a task that has been created for that purpose, and you must be assigned to that task.

1. Create a task.
2. Assign the task to yourself.
3. From the task profile, click **Actions** > **Create** > **Subproject**.

   The **Edit Project** dialog box appears.
4. Complete the fields as required. For more information, see "Creating a project" on page 18.
5. Click **Save**.

3. Project Teams

About project teams

If resource requests are enabled at the project level, the **Project team** tab is available on the project dialog box. You define your general resource requirements by adding project team entries. Project team entries consist of combinations of billing roles, functions, and the duration and estimated effort of assignments.

You manage the project team resources as follows:

- add project team entries
- submit the resource requests for approval
- track the progress of resource requests
- after resource requests have been approved, assign resources to project tasks

Creating a project team entry

For planning purposes, you can create project team entries that are based on billing roles, instead of naming specific resources. Later, you can use these project team entries to submit resource requests.

1. Access the project for editing.
2. Click the **Project team** tab.
3. In the **Project Team Details** section, complete the fields as required. For more information, see the "Edit Project dialog, Project team tab options" section on page 34.
4. To add resources to your preferred resources list, in the **Project Team Details** section, click **Actions > Manage resources**.
5. In the section, click **Actions > Apply**.

   The entry is added to the project team table.
6. Click **Save**.

Edit Project dialog, Project team tab options

Field	Description
Assigned resource type-ahead field	Resource that has been assigned to the project team. This field is editable when no resource request is associated with this project team. This list includes resources who are exempt from the resource request process.
Requested resource list	Resource that you request for project team entry. Available only when no resource has been assigned. When you submit the resource request, the requested resource in this section is set by default from the requested resource in the project team. You can modify this value later, if required.
Billing office list	Billing office from the project. You can select a different billing office to access a different set of billing roles.
Billing role list	Billing role of the project team entry.
Function type-ahead field	Job function of the resource.
Start date field	Date the resource will start.
Finish date field	Date the resource will finish.
Estimated hours field	Number of hours that you require the resource.
Soft-booked check box	When selected, indicates that the resource is tentatively booked for planning purposes. Available only if soft-booking is enabled on the billing office.For more information, see "About soft-bookings" on page 12.
Add to calendar check box	When selected, adds the project team entry to the resource's personal calendar and the resource scheduling calendar
Submit request check box	When selected, displays the **Requested resource** and the **Number of resource requests** fields that are required to submit a resource request.

Field	Description
Requested resource list	Resource that you request.
Number of resource requests field	Number of resources that you require.
Comments field	Instructions for the resource manager.
Resource request status field	After the resource request has been submitted, the project team entry displays the request number.
Specified qualifications field	Qualifications that the resource must have.
Assigned tasks field	List of project tasks that can be assigned to resources.
Project team comments field	Comments about the project team entry.

Copying projected resources to a project team

The projected resources from the contract that is associated with a project can be copied to the project team as project team entries. Assigned resources are copied only if they are exempt from resource requests. You can then edit the project team entries as required.

1. Access the project for editing.
2. Click the **Project team** tab.
3. Click **Actions** > **Copy from projected resources**.

   The projected resources records from the contract are added to the project team table.
4. To edit a project team entry:
   a. Select the row in the project team table. The details appear in the **Project Team Details** section.
   b. Make the necessary changes.
   c. Click **Actions** > **Apply.**

5. To include an entry in the resource's personal calendar and the resource scheduling calendar, select the **Add to calendar** check box.
6. Click **Save**.

Submitting a resource request for a project team

When you submit a resource request, you can either request a specific resource or leave the resource field blank and have the resource manager assign the resource. The resources available for selection are the resources from your preferred resources list. You can also submit a resource request for multiple resources based on a billing role only. For example, you could submit a resource request for 5 developers.

1. Access the project for editing.
2. Click the **Project team** tab.
3. In the table, select the project team entry for which you want to submit a request.

   The details of the project team entry are displayed in the **Project Team Details** section.
4. In the **Project Team Details** section, select the **Submit request** check box.

   The **Requested resource** type-ahead field, the **Number of resource requests** field and the **Comments** field appear.
5. To request a specific resource, in the **Requested resource** type-ahead field, select the resource.
6. To request multiple resources:
   a. Leave the **Requested resource** field blank.
   b. In the **Number of resource requests** field, enter the number of resources that you require.
7. To mark a qualification as preferred, in the **Specified qualifications** tree view, right-click the qualification and select **Set as preferred**.
8. In the **Comments** field, enter instructions for the resource manager.
9. In the **Project Team Details** section, click **Actions > Apply**.

   In the project team table, a check mark is displayed in the **Submit request** column of the project team entry row.

10. Click **Save**.

    The resource request is submitted to the resource manager for approval.

    Tip: You can search for available resources by clicking **Actions** > **Resource search**. For more information, see "Resource Searches" in the *Resource Management User Guide*.

Editing a project team entry

You can edit a project team entry only if a resource request has not been submitted, or the associated resource request is still in the New status. Once the resource request is no longer in the New status, changes can only be made by editing the resource request.

1. Access the project for editing.
2. Click the **Project team** tab.
3. In the table, select the project team entry.
4. Make the necessary changes. For more information, see "Edit Project dialog, Project team tab options" on page 34.
5. In the **Project Team Details** section, click **Actions** > **Apply**.
6. Click **Save**.

Deleting a project team entry

You can delete a project team entry provided that a resource request has not yet been submitted for it, or the resource request has been submitted but it is still in the initial status.

1. Access the project for editing.
2. Click the **Project team** tab.
3. In the table, select the project team entry.
4. In the **Project Team Details** section, click **Actions** > **Delete**.
5. Click **Save**.

Assigning a project team resource to a task

After a resource request has been approved, you can assign the resource to tasks. The duration and effort for the task must be within the duration and effort of the project team entry.

1. Access the project for editing.

2. Click the **Project team** tab.
3. In the table, select the project team entry.

   A list of project tasks appear in the **Assigned tasks** list.
4. In the **Assigned tasks** list, select the tasks that you want to assign to the resource.
5. To set the planned hours for a task:
   a. Right-click the task and select **Set planned hours**. The **Set Planned Hours** dialog box appears.
   b. In the **Planned hours** field, enter the number of planned hours planned for this task assignment.
   c. Click **OK**.
6. In the **Project Team Details** section, click **Actions** > **Assign task**.
7. Click **Save**.

4. Managing Projects

About editing projects

Only the project manager can edit the project profile; that is, change the information in the project dialog box. Project plan editors can view the project dialog box only. This topic includes information to consider before making certain changes to the project profile.

Changing the billing office of a project

If you change the billing office, all planned effort that has been manually allocated for project task assignments will be lost, except in the following circumstances:

- allocations for loading methods 3 and 4 that do not replace planned effort in past periods with actual hours are retained
- allocations for loading methods 0, 1 and 2 that replace planned effort in past periods are retained when the past data does not have to be recalculated, for example:
    - the billing office is removed and no new billing office is selected
    - the start date of the current fiscal period on the new billing office matches the start date of the current fiscal period on the previous billing office
    - the planned start date of the task assignment is in the current fiscal period or a future fiscal period of the new billing office

Changing the billable status of a project

You cannot change the setting of the **Billable project** check box when the **Split billing** check box has been selected on the **Billing information** tab of the contract and either of the following conditions exist:

- Invoices exist for a contract or phantom contract that is in **Draft**, **Pending Approval**, **Pending second approval** or **Approved** status.
- All invoices are committed, but there is time or expenses for the contract or phantom contract that have not been fully invoiced.

Changing the requirement for task status updates

You can change whether task status updates are required for a project by changing the project type.

If you change the requirement for task status updates from **Status required** to **Status not required**, the requirements for all existing tasks and task assignments as well as new tasks and task assignments created later will automatically be changed to **Status not required**.

If you change the requirement for task status updates from **Status not required** to **Status required**, you have the following options:

- change the requirement for existing as well as new tasks and task assignments
- change the requirement for new tasks and task assignments only

Editing a project

1. Access the project.

   The project profile appears.

2. Click ⋮ > **Edit**.

   The **Edit Project** dialog box appears.

3. Make the necessary changes. For more information, see "Create/Edit Project dialog, General tab options" on page 18.

4. Click **Save**.

About deleting a project

When you delete a project, all of the project and task information is deleted. You cannot delete a project if any of the following conditions exist:

- there are time and expense entries for the project that have not been invoiced and archived
- the project contains an active subproject
- the project is included in a project portfolio
- there is a project task associated to an expense

Deleting a project

1. Access the project for editing.

   The **Edit Project** dialog box appears.

2. Click **Delete**.

3. Click **OK** to confirm.

About copying projects

You can copy project information to update an existing project or create a new project. When you copy project information, all project and task field values, including the configurable field values from the source project, are automatically copied to the target project, except for the settings in the **Access** tab.

> **Note:** If resource requests are required for the project, then you cannot copy task assignments from the source project to the new project.

When you copy project information, you can:

- Specify a project manager (for new projects only). The new project manager must be in your preferred resources list and have the security access to manage tasks in order for the project tasks to be copied to the target project
- Specify whether the planned start and finish dates for the target project are based on a specified start or end date.
- Copy project-related knowledge items.
- Copy resource assignments and/or specify a default resource.
- Copy resource billing roles
- Copy work locations and work codes for the project.
- Copy work locations and work codes for the tasks and task assignments.

About copying a project to update an existing project

You can copy project information from a source project to an existing target project provided that you have edit access to both the source and target projects and/or the projects' tasks, and the project manager of the target project is in your preferred resources list.

You can only copy the type of information that you have edit access to on the target project. For example, if you are the project manager for both the source and target projects, you can copy all project and task information. However, if you are the project manager for the source project, but only a summary task manager for the target project (and summary task managers can create tasks for the project), then you will only be able to add tasks under the summary tasks that you have access to in the target project.

Copying a project

1. Access the profile of the source project.
2. Click > **Copy**.
3. If knowledge items exist for the source project, a dialog box appears. Do one of the following:
   - To include the knowledge items, click **OK**.
   - To exclude the knowledge items, click **Cancel**.

   The **Copy Project** dialog box appears.
4. Do one of the following:
   - To create a new project from an existing project, do not select the **Update project** check box.
   - To update an existing project with the information of the source project, select the **Update project** check box.
5. Complete the fields as required. For more information, see "Copy Project dialog box options" on page 42.
6. Click **Save**.

Copy Project dialog box options

Field	Description
Copy source field	Name of the source project which information are copied.
Update project check box	When selected, the source project information is copied to an existing project. When cleared, the source project information is used to create a new project.
Project manager list	Project manager of the target project. The field displays your name by default.

Field	Description
Target project type-ahead field	Project to which the information is copied.
Insert into summary task type-ahead field	Summary task under which tasks are copied
Name of new project field	Name for the new project.
Alternate name field	Alternate name for the project.
Customer type-ahead field	Customers for which the project is created.
Customer ID type-ahead field	ID of the customer.
Contract list	Contract associated with the project.
Phase list	Phase of the tasks. If phases are selected, only the tasks that are in one or more phases of the source project are copied to the project.
Base new timescale on. **Start date** check box	When selected, planned dates are based on the start date of the source project.
Base new timescale on, **End date** check box	When selected, planned dates are based on the end date of the source project.
Date field	Start or end date for the project.
Copy resource assignments into the new project check box	When selected, copies the resource assignments from the tasks in the source project to the new project.
Copy resource billing roles into the new project check box	When selected, copies the billing roles from the tasks in the source project to the new project.

Field	Description
Default resource list	Default resource to be used when the resources from the source project are not available.
Copy selected work locations and work codes from the source project check box	When selected, copies the work locations and codes from the source project to the new project.
Copy selected work locations and work codes from the source tasks and task assignments check box	When selected, copies the work locations and codes from source tasks and task assignments to the new project.

About completing the Copy Project dialog box

Copying tasks

By default, all tasks are copied from the source project. However, you can specify that only the tasks that are associated to one or more project phases in the source project are copied.

Selecting a default resource

You can select a default resource from your preferred resources list to be used when the resources from the source project are not available. For example, the default resource is used when a resource from the source project has been deleted or unassigned from a task or is unavailable to the new project manager. If resource requests are enabled on the contract, the **Default resource** list contains resources from the projected resources for the contract.

Specifying the target project timescale

You can specify whether the target project planned dates are based on a start date or end date. If you specify that the project timescale be based on a start date, then the planned start dates for the target project tasks are based on the relative period of time between the planned start date of the source project tasks and the planned start date of the source project.

For example, if the planned start date for a source project task was 10 days after the planned start date of the source project, then the start date for the target project task will be 10 days after the start date that you specify for the target project.

Similarly, if you specify that the project timescale be based on an end date, the planned finish dates for the target project tasks will be based on the relative period of time between the planned finish date of the source project tasks and the planned finish date of the source project.

Copying resource assignments

You can copy resource assignments from the tasks in the source project to the tasks in the target project. If resource leveling is enabled for your organization, the copied task assignments are validated for any resource leveling restrictions when you save the target project. If resource requests are enabled at the contract level and the option to override task restrictions is not selected, then task assignments are not created.

Only the invalid task assignments in the source project that include planned hours are copied to the target project and assigned to the default resource. The planned hours for the copied task assignment will be the total hours of all of the invalid task assignments for the same task.

Copying billing roles

You can copy the billing roles from the tasks in the source project to the tasks in the target project. Only the billing roles that are valid and available are copied to the target project.

Copying project work locations and work codes

You can specify whether the selected work locations and codes, including the defaults, are copied from the source project or from the contract of the target project. In either case, only the work locations and codes that are specified in the contract of the target project are valid for the target project. If you specify to copy the work locations and codes from the project and none of them are valid, then the work locations and codes from the contract of the target project are used.

> **Note:** When the work locations and codes are copied, the settings for expense overrides and whether non-project locations can be used are also copied.

Copying work codes and locations for tasks

You can specify whether the selected work locations and codes for tasks and task assignments, including the defaults, are copied from the source project. If the default work location and work code from the tasks and task assignments of the source project are not valid for the target project, then the default values from the target project are used.

If the selected work locations and codes for tasks and task assignments are not copied from the source project, then the work locations and codes from the target project are used for new tasks and task assignments.

Note: When the work locations and codes are copied, the settings for expense overrides and whether nonproject locations can be used are also copied.

Reassigning a project

Project managers can reassign a project to any resource that has access rights to edit the project plan. When you reassign a project, the resource becomes project manager of the project and has full edit rights, and you become a project plan editor.

1. Access the project for editing.

   The **Edit Project** dialog box appears.

2. Click the **Access** tab.
3. In the **Edit project plan** list, right-click the resource to whom you want to reassign the project and select **Reassign**.
4. Click **OK** to confirm.
5. Click **Save**.

Taking ownership of a project

Project plan editors can take ownership of a project if the project manager has enabled the option on the project. When a project plan editor takes ownership of a project, the project plan editor becomes the project manager and the project manager becomes a project plan editor. Project managers can take back ownership of a project when necessary.

1. Access the project.
2. Click ⋮ > **Transfer project to me**.

About saving project baselines

After you have set up your project, you can save a baseline for the entire project, subproject, summary task or individual task. This topic describes saving project baselines. For task baselines, see "About saving task baselines" on page 68.

When you save a baseline for a project, the planned information for the project is rolled up first to ensure that accurate information is available at the task, summary task and project levels.

The baseline information for the project, summary tasks, tasks and task assignments, including the date and time that the baseline was created and the resource who created it, is stored in the database. The following information is displayed in the **Status information** section of the project profile:

- Baseline start – the earliest planned start date of all project tasks
- Baseline finish – the latest planned finish date of all project tasks
- Baseline hours – total planned hours for the project tasks

If the option to roll up planned information from subprojects to parent tasks has been enabled for the parent project, then during summary tasks will be updated to also include the rolled up information from subtasks and subprojects and the baseline information will be captured in the general section of the summary task profile.

> **Note:** The baseline functionality is not available for projects that are linked to Microsoft Project. Also, if a parent project of the project being baselined is linked to Microsoft Project, then baseline information will not roll up to the parent project.

You can save a baseline at any time. When you save a new baseline, the current and previous baseline information is stored in the database. All baseline information can be accessed by creating custom reports.

The project manager can also give resources the option to save a baseline for a task without affecting higher-level tasks. Note however, that saving a baseline without affecting higher-level tasks can result in the project and task baselines being out of balance.

> **Note:** Some example project and task baseline scenarios are available. For more information, see "Scenarios for saving baselines" on page 173.

Saving a project baseline

1. Access the project.
2. Click ⋮ > **Baseline**.
3. To view the baseline information:

a. Refresh the project by clicking **Projects** to go to the list view and then reselecting the project.

b. Expand the **Status information** section.

About rolling up projects

When you roll up a project manually, the system rolls up the following information from the task assignments to the tasks, and then from the tasks to the project:

- planned, actual, and forecast start dates – the earliest of each of these dates from the task assignments becomes the planned, actual, and forecast start dates for the project
- planned, actual, and forecast finish dates – the latest of each of these dates from the task assignments becomes the planned, actual, and forecast finish dates for the project
- planned, actual, and forecast hours – the totals of these hours from the task assignments become the planned, actual, and forecast hours for the project
- remaining hours – the remaining hours (forecast hours) for the task assignments roll up to the tasks and then the project

To ensure the project information is as accurate as possible, it is recommended that you roll up a project after all of the project tasks have been created.

Rollup rules for draft tasks

The information from draft tasks is not rolled up.

Rollup rules for open tasks

The planned start, finish and hours from the task assignments of open tasks do not roll up. Only the actual and forecast dates and hours roll up to the open task and then to the project.

Rollup rules for summary tasks

The planned, actual and forecast information from the task assignments of both the summary task and its subtasks roll up to the summary task and then up to the project.

Rollup rules for subprojects

The planned, actual and forecast information from the task assignments roll up to the tasks which roll up to the parent task of the subproject and then to the parent project.

If the parent project has been configured to NOT roll up planned information from subprojects to parent tasks, then only the actual and forecast information from the tasks assignments of the tasks of the subproject is rolled up to the subproject task and then up to the parent project.

Automatic roll up of projects

Projects for which fiscal periods have been selected, and projects that belong to portfolios are automatically rolled up by system updates. Projects are rolled up automatically in the following situations:

- When there is a change to the project that makes a rollup necessary, for example, changes to planned, actual, and forecast information.
- The project has task assignments with loading methods that replace past data with actual data. These projects are rolled up at the beginning of the fiscal period that was selected for the project.

Rolling up a project manually

1. Access the project.
2. Click ⋮ > **Roll up**.

   The planned, actual and forecast information is rolled up and updated in the task and project profiles.

5. Managing Tasks

About tasks

After a project is created, the next step is to create tasks and assign them to resources. You can create the following type of tasks for your projects.

Tasks

You create tasks for specific project work and assign them to resources. Only the resources who are assigned to a task can enter time for it.

Summary tasks

Summary tasks are tasks that contain subtasks, which are the tasks grouped under them in the **Projects** tree view. You use summary tasks to organize the major phases and subphases in a project.

By default, time can be entered for summary tasks. During project rollup, the time amounts from the subtasks are added to the summary task amounts.

> **Tip:** To prevent time entry on a summary task or its subtasks, select the **Locked task** check box on the task.

Open tasks

Open tasks are tasks that all resources can enter time for without having to be assigned to them. Examples of open tasks are status meetings or tasks that can be performed by any resource in a resource pool. You can also use open tasks to track non-project related tasks instead of using non-project time items that must be configured by the system administrator.

When a resource enters time for an open task, a task assignment is automatically created for the resource.

You can restrict time entries to an open task by role or workgroup but these restrictions do not apply to resources who are assigned to the open task.

Open tasks cannot contain subtasks and therefore cannot be summary tasks.

If resource leveling is enabled, the planned hours for open tasks is 0 (zero) and cannot be edited.

If resource leveling is not enabled, you can specify the planned hours for an open task so that when a resource enters time for the task, the planned hours are automatically defined.

Milestone tasks

Milestone tasks mark a significant point in a project. Milestone tasks can have a duration of zero or more days and appear as a diamond-shaped icon in the Gantt chart.

Task icons

The following table list the various task icons and their descriptions.

Task Icon	Description
	A green task icon indicates that you are assigned as a resource to the task. Assigned tasks are also included in the Time Sheet tree view.
	A gray task icon indicates that you have access to view the task, but are not assigned to the task.
	A task icon with a diamond indicates the task is a project milestone.
	A task icon with a circled check mark icon indicates the task is complete.

Accessing a task

You can only access the tasks to which you are assigned, and tasks within a project for which you are the project manager, project plan editor or summary task manager.

1. Click **Projects**. The **Projects** list view appears.
2. To display the tree view, click **Tree view**. The **Projects**list view appears.
3. Expand the **Projects** tree view to display the tasks.

   Tip: To locate a task, you can enter the full or partial task name in the **Filter** field and then click **Filter**. The tree view displays the projects that contain tasks that match the filter text.
4. Select the task.

   The task profile appears.

About creating tasks

After creating a project, you create a task for each activity that you want to track.

You can create tasks from many different starting points. The starting point determines the amount and type of task-related data that is automatically completed for the task. For example, if you create a task from a project, then the project-related information will automatically be completed for the task.

Task editing view, General section options

Option	Description
Project list	Project for the task.
Task name field	Name for the task.
Planned start date field	Date that the task should start. The default date is the date that the task is created.
Planned finish date field	Date that the task should be completed. The default date is the day after the date that the task is created.
Planned hours field	Estimated number of hours that are required to complete the task. The planned hours for the task must equal the total of the planned hours for the task assignments.
Project phase field	Project phase that the task applies to. For more information, see "About project phases" on page 16.
Billing role type-ahead field	Default billing role for resources that are assigned to the task. You can override the default when making specific staff assignments. The billing roles come from the contract. If no billing roles are specified for the contract, or the default was cleared for the task, the task assignment is created without a billing role.
Function list	Default job function for resources that are assigned to the task. You can override the default for task assignments.

Option	Description
Request type-ahead field	Number of the request that is associated with the task.
Locked task check box	When selected, prevents resources from entering time for the task assignments for the task. However, you can change the setting for individual task assignments.
Include in resource demand check box	When selected, new task assignments created for this task are included in resource demand analysis by default. Selected by default on new tasks. You can override the default for task assignments.
Open task check box	When selected, makes the task an open task and the **Assignment planned hours** field appears. For more information, see "Open tasks" on page 51.
Billable task check box	When selected, makes the task billable.
Billed to fixed-fee portion of the contract check box	When selected, bills the task to a fixed-fee portion of the contract. The time entered for this task does not display on the invoice.
Fixed fee list	Deliverable to which the task is associated, if the **Billed to fixed-fee portion of the contract** option is selected. Specifying a deliverable allows costs and revenues to be tracked against fixed fees.
Utilization eligible check box	When enabled, the task time is included in the utilization for assigned resources. For billable projects, the option is automatically selected. For nonbillable projects, the option is automatically cleared. The project manager can change the utilization eligible setting of any task.

Option	Description
Milestone check box	When selected, identifies the task as a milestone on the Gantt chart, and automatically sets planned hours to zero.
Capital check box	When selected, designates the task as a capital cost.
Completed check box	When selected, sets the task to completed status. Typically used for tasks that are not assigned to resources, such as milestone tasks. When a task is set to complete, the status for the task assignments is automatically set to complete. The task is automatically set as completed when all of its task assignments are completed.
Add to calendar check box	When selected, the planned hours for the task are included in the personal calendars of the assigned resources and the resource scheduling calendar.
Contract product field	Products that can be associated with the task and invoiced based on the status of the task.
Contract product ready to invoice check box	When selected, the product that is associated with the task becomes available for invoicing.
Comments field	Additional information about the task. Comments can be viewed by all resources assigned to the task.
Time entry restrictions section	
Restrict time entries to within the planned dates for option	Prevents resources from entering time for dates that are outside of the planned start and planned finish dates of the selected option (task, task assignment).
Restrict time entries to within the planned effort for option	Prevents resources from entering time when the total time entered for the selected option exceeds the planned effort.

Creating a task

You can create a task for planning purposes by completing only the following fields in the **General** section:

- **Task name**
- **Project**
- **Planned start**
- **Planned finish**
- **Planned hours**

After you have saved the task, you can complete the remaining fields and sections as required. For a list and description of all task fields, see "Task editing view, General section options" on page 53.

Note: Tasks at the top WBS level can be created or activated only by a project manager or project plan editor who has the project locked.

1. Click > **Applications** > **New** and then select **Task** from the list.

   The task editing view appears.

2. In the **Task name** field, type the task name.
3. In the **Project** field, select the project for which the task is being created.
4. In the **Planned start** field, enter the date that you expect the task to be started.
5. In the **Planned finish** field, enter the date you expect the task to be finished.
6. In the **Planned hours** field, enter the estimated number of hours required to complete the task.
7. Do one of the following:
   - To save the task, click **Actions** > **Save**. The task is created.
   - To complete the remaining task sections, see "Completing the General section of the task editing view" on page 57.

Completing the General section of the task editing view

For more information about the task fields, see "Task editing view, General section options" on page 53.

1. Access the task.
2. Click **Actions** > **Edit**.

   The edit task view appears.
3. Complete the fields as required.
4. To make the task an open task:
   a. Select the **Open task** check box. The **Assignment planned hours** field displays. If resource leveling is enabled, the value is 0 and cannot be edited.
   b. If resource leveling is not enabled, you can specify planned hours for the open task.
5. To bill the task to a fixed fee portion of the contract:
   a. Select the **Billed to fixed-fee portion of the contract** option.
   b. In the **Fixed fee** field, specify the deliverable to which the task is associated.
6. Click **Actions** > **Save**.
7. To complete the remaining sections, see the following topics:
   - "Changing the work location and work code settings for a task" on page 76
   - "Assigning a resource to a task assignment" on page 59
   - "Associating a task to a product" on page 58

Restricting time entries for an open task

By default, all resources can enter time for open tasks. You can restrict time entries for an open task to one or more workgroups and/or roles so that only the following resources can enter time for the task:

- resources who are members of the workgroups that you select
- resources assigned to one of the selected roles that you select

Note: Resources who are assigned directly to open tasks can always enter time for the tasks and are not affected by time entry restrictions.

1. Access the task.
2. Click **Actions** > **Edit**.

   The edit task view appears.
3. Expand the **Restrict access for open tasks** section.
4. To enable access restrictions, select the **ChangePoint users allowed to enter time against this task** check box.
5. Select the check boxes for the workgroups and roles that can enter time for the task.
6. To automatically include the workgroups that are below the selected workgroups in the hierarchy, select **Include children**.
7. Click **Actions** > **Save**.

   Note: The access restrictions are automatically removed if the **Open task** check box is cleared on the task editing view.

Associating a task to a product

You can associate a task to one or more products. The first product you select is marked as the primary product and is used for reporting purposes.

1. Access the task.
2. Click **Actions** > **Edit**.

   The edit task view appears.
3. Expand the **Products** section.
4. Expand the tree view and select the check boxes of the products associated with the task.

   Tip: To change the primary product, click the name of the new primary product instead of the check box.
5. Click **Save**.

Assigning a resource to a task assignment

You can assign resources to tasks from the task editing view by creating a task assignment. When you create a task assignment, most of the fields have the same values as in the task, but they can be changed. The resources that you can assign to a task come from your preferred resources list or from the project team, when resource requests have been enabled.

1. Access the task.
2. Click **Actions** > **Edit**.

   The task editing view appears.
3. Expand the **Assignments** section.
4. Complete the fields as required. For more information, see "Task editing view, Assignments section options" on page 60.
5. To specify a resource, in the **Resource** list, select the name of the resource that you want to assign to the task.
6. To add a resource to the list (and optionally to your preferred resources), click ..., which opens the **Select Resources** dialog box.
7. To specify the planned start and planned finish dates, do one of the following:
   - Enter the dates in the **Planned start** and **Planned finish** fields.
   - To have the system allocate effort for this task assignment, and calculate the planned start and finish dates, see the "About allocating planned hours for a task assignment automatically" section on page 65.
8. In the **Assignments** section, click **Actions** > **Save**.

   The resource is added to the task assignment table.
9. On the task editing view, click **Actions** > **Save**.

Task editing view, Assignments section options

Option	Description
Resource list	Resource assigned to the task.
Planned start date field	Date that the task should start. The default date is the date that the task is created.
Planned finish date field	Date that the task should be completed. The default date is the day after the planned start date.
Planned hours field	Estimated number of hours that are required to complete the task. The planned hours for the task must equal the total of the planned hours for the task assignments.
Allocate effort based on resource's current committed workload check box	When selected, the effort is allocated and the planned start and finish dates are calculated automatically.
Billing role type-ahead field	Default billing role for resources that are assigned to the task. You can override the default when making specific staff assignments. The billing roles come from the contract. If no billing roles are specified for the contract, or the default was cleared for the task, the task assignment is created without a billing role.
Billing rate field	Billing rate for the resource.
Billing role cost rate and **Resource cost rate** fields	Billing role-based or resource-based cost rate that is applicable to the task assignment.
Function list	Default job function for resources that are assigned to the task. You can override the default for task assignments.
Locked task check box	When selected, prevents resources from entering time for the task assignments for the task. However, you can change the setting for individual task assignments.

Option	Description
Include in resource demand check box	When selected, new task assignments created for this task are included in resource demand analysis by default. Selected by default on new tasks. You can override the default for task assignments.
Status not required check box	When selected, resources are not required to update the status of their task assignments.
Work location group list **Work location** list	Work location group and work location where the work will be performed.
Work code category list **Work code** list	Work code category and work code of the task.
Allow work location override check box	When selected, resources can choose a different work location when they enter time for the task.
Allow work code override check box	When selected, resources can choose a different work code when they enter time for the task.
Soft-booked check box	When selected, the resource is tentatively booked for planning purposes. Soft-booked time is shown as flexible on the resource schedule calendar. When cleared, the resource is committed to the project.
Assignment comments field	Additional information about the task assignment.

About selecting resources for tasks

The following options to help you select resources are available from the **Actions** menu on the **Assignment** section of the task editing view:

- **Check available hours** to check if each assigned resource has enough available hours to cover the planned hours for the task. For more information, see "Checking the available hours of a resource" on page 62.
- **Resource search** to search for an available resource. For more information, see "Resource Searches" in the *Resource Management User Guide*.

- **Resource availability** to view the calendar of a resource. For more information, see the "Resource Scheduling Calendar" in the *Resource Management User Guide*.

Checking the available hours of a resource

To avoid overbooking resources, you can check their available hours directly from the task editing view.

1. Access the task.
2. Click **Actions** > **Edit**.

   The edit task view appears.
3. Expand the **Assignments** section and verify the **Planned hours** values for each of the resources.
4. In **Assignments** section, click **Actions** > **Check available hours**.

   The **Check Available Hours** dialog box appears. For more information, see "About checking the available hours for resources" on page 62.

   When the planned hours for the task exceed the available hours for a resource, the values are displayed in red. However, you can still assign the task to the resource.

About checking the available hours for resources

The **Check Available Hours** dialog box displays the following information for each resource listed in the Assignment section of the task editing view.

Resource name and task duration

The duration of the task is displayed next to the resource name. If the task status has not been updated, then the **Planned start** and **Planned finish** dates are used for the task duration. If the task status has been updated, then the **Actual start** and **Forecast finish** dates are used.

Planned hours for this task

The planned hours for the current task.

Planned hours for all other tasks

For each task other than the current task, the total planned hours for the task are divided by the number of working days in the task duration to calculate a daily amount. The total of the daily

amounts for the tasks is then multiplied by the number of working days for the current task. If the task status has been updated, then **Remaining hours** are used instead of **Planned hours**.

Resource calendar entries

The total hours from all calendar entries, excluding the task assignment entries.

Available hours

Available hours = Total working hours – (Planned hours for all other tasks + Resource calendar entries)

Total working hours = Number of working days in the task duration * daily capacity for the resource

If the available hours is less than the planned hours for the current task and resource, then all of the values for the resource display in red. If the available hours is 0 or less, then 0 is displayed.

Example of Check Available Hours calculations

This example consists of a current task for a resource, who has also been assigned task A and task B during the same time period, and an explanation of how each of the values in the **Check Available Hours** dialog box is calculated.

Current task information

Planned start: Monday, January 1

Planned finish: Monday, January 8

Planned hours: 15

Non-working days: Monday, January 1 (legal holiday), Saturday, January 6, and Sunday, January 7

Working days in the task duration = 8 – 2 weekend days – 1 legal holiday = 5 days

Daily capacity (specified in user setup) = 8

Total working hours: 5 * 8 = 40

Planned hours for this task = 15

The planned hours for the task in this example is 15, which comes from the task assignment.

Planned hours for all other tasks = 14

The planned hours for this task is 14, calculated as follows:

Task A, status has not been updated

Planned start: January 2

Planned finish: January 11

Working days in task A duration = 8 days

Planned hours = 16

Planned hours per day: 16 / 8 = 2

Planned hours for the current task duration (January 2 to 8) = 2 * 5 = 10

Task B, status has been updated

Actual start: January 5

Forecast finish: January 10

Remaining hours = 8

Working days in task B duration = 4 days

Planned hours per day: 8 / 4 = 2

Planned hours for the current task duration (January 5 and January 8): 2 * 2 = 4

Total planned hours for task A and task B: 10 + 4 = 14

Resource calendar entries = 12

The resource has three calendar entries, each for 4 hours.

4 * 3 = 12

Available hours = 14

The available hours is 14.

Available hours = Total working hours – (Planned hours for other tasks + Resource calendar entries)

40 – (14 + 12) = 14

The values in the **Check Available Hours** dialog box would display in red because the available hours (14) is less than the planned hours (15) for the current task.

About viewing billing rates and cost rates in task assignments

If you have view access rights to billing rates, the **Billing rate** column and either **Resource-based cost rate** or **Billing role-based cost** columns display in the task assignment table, and the corresponding fields display in the **Assignments** section. The rates come from the billing office and cannot be edited.

You can show or hide the billing rate and cost columns that display in the task assignment table. Right-click anywhere on the task assignment table and select the appropriate option (**Hide/show billing rates**, **Hide/show cost rates)**.

About allocating planned hours for a task assignment automatically

If your organization uses resource leveling, you can have the system allocate effort (planned hours) for a task assignment based on the availability of the resource. The system calculates the resource's availability based on the following formula:

daily capacity * (percent available / 100) – committed resource demand hours

Where:

- daily capacity is the number of hours specified in user setup
- percent available is the percent available for planned work for the workgroup that the resource belongs to
- committed resource demand hours are the hours from demand items that resource has already been committed to

You also specify that the planned start and/or planned finish dates should be calculated automatically:

- Planned start date only – planned hours are allocated starting from the planned finish date and then to each working day before the finish date until all of the planned hours are allocated. The earliest date for which planned hours are allocated becomes the planned start date.
- Planned finish date only – planned hours are allocated starting from the planned start date and then to each working day after the planned start date until all of the planned hours are allocated.

- Both planned start and planned finish – the first date that the resource has hours available and which is on or after the current date or the earliest planned start date (whichever is later) becomes the planned start date.

  Planned hours are allocated starting from the planned start date and then to each working day after it until all of the planned hours are allocated. The latest working day for which planned hours have been allocated becomes the planned finish date.

In all cases, if the calculated planned start date is earlier than the original planned start date or the calculated planned finish date is later than the original planned finish date for the task, then the original planned dates for the task are changed accordingly.

Note: If project-level resource requests are enabled, then the hours can be allocated only within the planned start and finish dates in the approved resource request.

Allocating effort for a task assignment automatically

1. Access the task.
2. Click **Actions** > **Edit**.

   The edit task view appears.
3. Expand the **Assignments** section.
4. In the **Resource** list, select the resource.
5. Select the **Allocate effort based on Resource's current committed workload** check box.
6. To specify the earliest date that the task assignment can start:
   a. Select the **Calculate start date** check box. The **Planned start** field changes to **No earlier than**.
   b. Enter the earliest acceptable start date.
7. To specify the latest date that the task assignment can end:
   a. Select the **Calculate finish date** check box. The **Planned finish** field changes to **No later than**.
   b. In the **No later than** field, enter the latest acceptable finish date.
8. Click **Allocate effort**.

The dates in the **Planned start** field and **Planned finish** fields are updated based on the allocation calculation.

Submitting resource requests for tasks

If resource requests have been enabled for tasks, you cannot assign a resource to a task directly. You must first submit a resource request, which must be approved by a resource manager.

1. Access the task.
2. Click **Actions** > **Edit**.

   The edit task view appears.
3. Expand the **Assignments** section.
4. In the **Planned hours** field, enter the estimated number of hours required to complete the task.
5. In the **Planned start** field, enter the planned start date for the task assignment.
6. In the **Planned finish** field, enter the planned finish date.
7. In the **Billing Role** type-ahead field, enter a billing role for the task assignment.
8. To request a specific job function, in the **Function** list, select the function.

   The qualifications for the function appear in the **Qualifications** field.
9. To request a specific resource, in the **Requested resource** type-ahead field, enter the name of the resource.
10. In the **Number of resource requests** field, enter the number of resources that you require.
11. If no function and no resource is specified, in the **Qualifications** field, you can select specific skills and competencies for the resource request.
12. To mark a qualification as preferred, right-click the qualification and then select **Set as preferred**.
13. In the **Assignment comments** field, enter instructions for the resource manager.
14. In the **Assignments** section, click **Actions** > **Save**.

    The resource request is added to the assignment table and is marked as soft-booked.
15. At the top of the task editing view, click **Actions** > **Save**.

The request is submitted to the resource manager for approval.

Deleting resources from task assignments

You can delete resources from task assignments provided that none of the following conditions exist:

- the resource has entered time or expenses for the task assignment
- the parent task is associated with a subproject
- there are outstanding resource requests that have not been canceled

If any of the above conditions exist for a resource, the delete option will not be available.

1. Access the task editing view.
2. Expand the **Assignments** section.
3. Select the resource in the assignments table.
4. In the **Assignments** section, click **Actions** > **Delete**.
5. Click **OK** to confirm.
6. In the task editing view, click **Actions** > **Save**.

About saving task baselines

You can save baselines for summary tasks, subtasks and tasks. When you save a baseline for a task, the planned information is first rolled up to the project level. If the option to roll up planned information from subprojects to parent tasks has been enabled for the parent project, then summary tasks will be updated to include the rolled up information from subtasks and subprojects. The system does not check whether resources have access to the subprojects before performing the rollup.

After the rollup, the baseline information for the task and its task assignments and the subprojects and projects above it in the WBS is saved. If the task is a summary task, then the baseline information for all tasks below the summary task and the project above it is also saved. If the task is a subtask, then the baseline information for all tasks and task assignments below the subtask, and the summary task and project above it is saved.

When you save a task baseline, the system uses the previous (most recent) baseline values for the other project tasks and task assignments when they are required to calculate summary task and project baselines.

Example of saving task baselines

In the following table, the **Initial baseline** column shows the baseline planned hours for a project after an initial baseline. The **Updated** column shows that the planned hours for subtask 1.1 and 1.2 were changed to 7 hours each. The **Baseline subtask 1.1** column shows the baseline planned hours after a baseline was saved for subtask 1.1, which the system calculated by using:

- the updated planned hours for subtask 1.1 and the previous baseline planned hours for subtask 1.2, to calculate the baseline planned hours for task 1
- the previous baseline planned hours for subtask 2.1 to calculate the baseline planned hours for task 2
- the previous baseline planned hours for task 2 and the updated planned hours for task 1 to calculate the baseline planned hours for project 1

Project item	Initial baseline planned hours	Updated planned hours	Baseline subtask 1.1 planned hours
Project 1 (rolled up from tasks 1 and 2)	21		22
Task 1 (rolled up from subtasks 1.1 and 1.2)	11		12
Subtask 1.1	6	7	7
Subtask 1.2	5	7	5
Task 2 (rolled up from subtask 2.1)	10		10
Subtask 2.1	10		10

After a baseline is saved, the following information is displayed in the task profile and task assignment profile:

- **Baseline start** – the earliest planned start date of the tasks
- **Baseline finish** – the latest planned finish date of the tasks
- **Baseline hours** – total planned hours for the tasks

Note: For some example project and task baseline scenarios, see "Scenarios for saving baselines" on page 173.

You can save a task baseline at any time. When you save a new task baseline, the previous baseline information is stored in the database.

Saving a task baseline

1. Access the task.
2. Click **Actions** > **Baseline**.

   The **Baseline start**, **Baseline finish**, and **Baseline hours** are updated based on the current planned start date, finish date and hours of the task or subtasks.
3. Refresh the details view to display the baseline information for the task and task assignments.

About saving a task baseline without affecting higher level tasks

Normally when a task baseline is saved, the system rolls up the baseline for all affected tasks below the selected task to the selected task itself, and then up to the appropriate project level above the selected task in the WBS. For more information, see "About saving task baselines" on page 68.

However, the project manager can enable the option to save a task baseline without affecting higher level tasks. If this option has been enabled for a project, when resources save a task baseline, they have the option to save the task baseline as usual, or up to the selected task level only.

Warning: Saving a baseline without affecting higher-level tasks can result in the project and task baselines being out of balance.

If the option to roll up planned information from subprojects to parent task is enabled, it takes precedence over the option to save a baseline without affecting higher level tasks. In this case, if you baseline a subtask of a subproject, the baseline will be rolled up to the parent task even if you select the option to baseline without affecting higher level tasks.

For some example project and task baseline scenarios, see "Scenarios for saving baselines" on page 173.

Saving a task baseline without affecting higher level tasks

1. Access the task.

2. Click **Actions** > **Baseline**.

   A dialog box appears.

3. Select one of the following options:

   - To save the baseline as usual, select **Baseline all tasks above and below the selected task**.
   - To save the baseline without affecting higher level tasks, select **Baseline only the selected task and tasks below it**.

4. Click **OK**.

5. To view the baseline information for the task and task assignments, click the task in the tree view.

About task dependencies (linked tasks)

You can create the following types of task dependencies between tasks:

- finish-to-start – successor task cannot start until on or after the predecessor task finish date
- start-to-start – successor task cannot start until on or after the predecessor task start date
- finish-to-finish – successor task cannot finish until on or after the predecessor task finish date
- start-to-finish – successor task cannot finish until on or after the predecessor task start date

  Note: ChangePoint handles start-to-finish dependencies slightly differently than Microsoft Project. In ChangePoint, the predecessor finish date is the working day before the successor start date, whereas in Microsoft Project, the predecessor finish date is the same date as the successor start date.

  Note: You can link tasks in different projects in the task profile only.

You cannot change the start date of the successor task directly if the start date is determined by the predecessor task. Similarly you cannot change the finish date of a successor task directly if the finish date is determined by the predecessor task.

Task dependency options

Field	Description
Dependency type field	Dependency type. Options are: • Finish-to-start (default) • Start-to-start • Finish-to-finish • Start-to-finish
Lag time field	Number of days between planned start date or finish date of the predecessor task and the planned start date or finish date of the successor task, according to the dependency type. Default value is 0 days.
Move successor task date check box	When enabled, does the following: • allows the successor task dates to be moved when the predecessor task is moved • when the predecessor task is moved, removes any gap between the linked tasks according to the constraints of the dependency type Selected by default.
Successor can start anytime after the predecessor check box	When enabled, if a predecessor task is moved, the successor task dates are moved only when required to ensure that the successor starts after the predecessor. Cleared by default.
Send notification check box	When enabled, sends an email notification to the project manager when the planned dates are moved due to task dependencies. Selected by default.

Linking tasks from the task profile

In the **Create Task Dependency** dialog box, the **Successor tasks** tab displays a table of the tasks that are already linked to the current task. When the **View selected tasks** option is selected, a project tree view displays under the options that shows the hierarchy of linked tasks. On the **Successor tasks** tab, you configure dependencies in which the current task is a predecessor task. On the **Predecessor tasks** tab you configure dependencies in which the current task is a successor task.

1. Access the task.
2. Click **Actions** > **Create** > **Task dependency**.

   The **Create Task Dependency** dialog box appears.
3. In the **Successor tasks** tab, select **Modify selected tasks**.

   A project tree view displays all of the projects and related tasks to which you have edit access rights.
4. Expand the tree view to locate the successor task. Tasks that are already successor tasks of the current task are displayed in bold font.
5. Double-click the successor task.

   The task is added to the table.
6. Specify the options as required. For more information, see "Task dependency options" on page 72.
7. To save the link, click in the table, but outside of the current row.
8. Click **OK** to confirm.
9. Click **OK**.
10. To specify a predecessor task:

    a. Click the **Predecessor tasks** tab.

    b. Create the link as described above.
11. Click **Close**.

Unlinking tasks from the task profile

1. Access the task.
2. Click **Actions** > **Create** > **Task dependency**.

   The **Create Task Dependency** dialog box appears.
3. Do one of the following:

   - Right-click the successor task in the table and select **Delete**.

- Click the **Predecessor** tab and then right-click the predecessor task in the table and click **Delete**.

The task is unlinked and removed from the table.

4. You can unlink tasks from tree view at the bottom of the dialog:
   a. Select the **Modify selected tasks** option.
   b. Search for the task or expand the tree view to locate the linked task. The names of linked tasks are in bold text.
   c. Right-click the linked task and select **Remove from successor task** or **Remove from predecessor task**. The task is unlinked and removed from the table.
5. Click **Close**.

Accessing the task editing view

1. Click **Projects**. The **Projects** list view appears.
2. To display the tree view, click **Tree view**. The **Projects** list view appears.
3. Expand the **Projects** tree view to display the tasks.

   Tip: To locate a task, you can enter the full or partial task name in the **Filter** field and then click **Filter**. The tree view displays the projects that contain tasks that match the filter text.
4. Do one of the following:
   - Double-click the task name.
   - Right-click the task name and select **Edit**.
   - Select the task to open the task profile and then click **Actions** > **Edit**.

   The task editing view appears.

About editing the Billable status of a task

If you change the billable status of a task, the **Effective date** check box appears.

If you specify an effective date, then the time records from the effective date and later use the new billable status. All invoices created before the effective date use the previous billable status.

If you do not specify an effective date, all time records that have not been invoiced use the new billable status.

If an effective date was previously entered for the billable status, and you do not specify an effective date, then all of the time records use the new billable status.

For example, a new task is marked as billable, and time is entered for May 1 to 5. If the billable option is later cleared and an effective date of May 3 is specified, then time for May 1 and 2 would be billable, but time for May 3, 4 and 5 would be nonbillable. However, if the billable option is cleared and an effective date is not specified, time for May 1 to 5 would be nonbillable.

You cannot change the **Billable task** option if any of the following conditions exist:

- the contract has not been configured to allow project managers to override the billable status
- the split billing option has been enabled on the contract and invoices exist under the contract or phantom contract which is in **Archive** status
- the split billing option has been enabled on the contract, and all invoices have been committed but there is time under the contract or phantom contract that has not been fully invoiced

About editing configurable fields on tasks

When you create a task, the values of the configurable fields for the task are automatically applied to task assignments, even if you create the task assignments at the same time as you are creating the task. However, if you edit the values for a configurable field and you want the new value to be applied to new task assignments, you must save the task first before creating the new task assignments.

Changing the billing role for a task

When you change a billing role, you must also specify an effective date for the change. You must ensure that the appropriate billing role is in effect when time records for the task assignment are invoiced. Changes made to the billing role are tracked in the task assignment history.

Note: You cannot change the effective date for a billing role once you have saved it, and subsequent changes to billing roles must have an effective date that is later than the current effective date.

1. Access the task.
2. Click **Actions** > **Edit**.

   The edit task view appears.
3. Expand the **Assignments** section.
4. Select the row for the resource whose billing role is being changed.
5. In the **Assignments** section, click **Actions** > **Change billing role**.

   The **Change Billing Role** dialog box appears.
6. In the **Billing role** list, select the new billing role.
7. In the **Effective date** field, enter the effective date of the new billing role.
8. Click **Save**.
9. Click **OK** to confirm.
10. In the **Assignments** section, click **Actions** > **Apply**.
11. At the top of the task editing view, click **Actions** > **Save**.

Changing the work location and work code settings for a task

The default work locations and work codes come from the project, but you can change them for tasks. You can also allow resources to choose a different work location or code when they enter time for a task.

1. Access the task.
2. Click **Actions** > **Edit**.

   The edit task view appears.
3. Expand the **Work locations/work codes** section.
4. In the **Work location group** list, select the general location where the work will be performed.

5. In the **Work location** list, select the specific work location where the work will be performed.
6. From the **Work code category** list, select the work code category.
7. From the **Work code** list, select the work code.
8. To allow resources to choose a different work location when they enter time for the task, select the **Allow work location override** check box.
9. To allow resources to choose a different work code when they enter time for the task, select the **Allow work code override** check box.
10. Click **Actions** > **Save**.

Deleting a task

You cannot delete a task if either of the following conditions exist:

- billable time has been entered for the task and that time has not been invoiced
- an expense has been associated to the task

Also, if the **Add to calendar** option is enabled on the task when it is deleted, the planned hours for the task are removed from the personal calendar of the assigned resources and from the resource scheduling calendar.

1. Access the task.
2. Click **Actions** > **Edit**.

   The edit task view appears.
3. Click **Actions** > **Delete**.
4. Click **OK** to confirm.

About reopening a completed task

Project managers, and the resources that are assigned to a completed task, can reopen the task provided that the project is still active. If the task has locked task assignments, you must unlock them first.

When you reopen a task, all of its task assignments are reopened with the following settings:

- percentage complete is set to 99

- remaining hours is set to 1.00
- actual finish date is cleared

When you reopen a subtask, the summary task is also reopened. Reopening a subtask automatically opens all related tasks up to the highest level.

Reopening a completed task (for project managers)

This procedure applies to project managers. For the procedure for resources, see "Updating the Status of a Task" in the *Time and Expense Management User Guide*.

1. Access the task.
2. Click **Actions** > **Edit**.

   The edit task view appears.
3. Expand the **Assignments** section.
4. If there are locked task assignments that you want to reopen, you must unlock them.
   a. Select the task assignment.
   b. Clear the **Locked task** check box.
   c. In the **Assignments** section, click **Actions** > **Save**.
   d. Repeat for each locked task assignment.
5. In the **General** section, clear the **Completed** check box.
6. Click **Actions** > **Save**.

   A message appears, asking if you want to reset the forecast dates.
7. Do one of the following:
   - To reset the forecast start and finish dates to the planned start and finish dates for all reopened task assignments, click **OK**.
   - To leave the dates unchanged, click **Cancel**.

Sorting tasks

You must use Project Worksheet to change the order of tasks.

6. Project Worksheet

Project Worksheet basics

Project Worksheet is a spreadsheet-like application that you use to do the following:

- create tasks and edit all task fields
- assign resources to tasks
- create task assignments and edit all task assignment fields
- allocate planned effort to daily or fiscal periods

By default, the tasks that you create in Project Worksheet are draft, and must be activated before they appear in the projects tree view and the timesheet.

The Gantt chart appears by default, but you can hide it or display only the Gantt chart and not the table rows.

Project Worksheet settings

You can set default settings for Project Worksheet. For more information, see the following topics:

- "Automatically activating draft tasks in Project Worksheet" on page 139
- "Setting up a warning when effort distribution on task assignments is overridden" on page 121
- "Specifying a default dependency type and lag time in Project Worksheet" on page 113

Project Worksheet best practices

For the best results when using Project Worksheet, the following best practices are strongly recommended.

Add only the required resources to your preferred resources list

It is not good practice to add all of the resources in your organization to your preferred resources. Add only the resources that you assign to tasks regularly. A long list of preferred resources reduces the efficiency of assigning tasks.

Limit the length of task durations

Limit the length of task durations, ideally to a year or less. It is not good practice to have an open task with a duration that spans many years. The nonworking day information is preloaded for each task based on the date range within the worksheet, which means that tasks that have long durations require years of data to be preloaded.

Limit the number of tasks, and resources assigned to a task

Keep the number of tasks within a project, and the number of assignments for each task to a reasonable level. Having a single open task that hundreds or thousands of resources enter time for can cause serious performance issues in Project Worksheet. If you require tasks for year-long activities such as training and development, nonbillable work, or meetings, consider doing the following instead:

- creating a new project for each fiscal year
- creating separate projects for different parts of the organization
- restricting access to open tasks by workgroups or functions

Keep projects at a manageable size

Keep project size from 400 – 1200 task or task assignment rows, and do not have more than 100 rows under any given level.

Create at least three levels of hierarchy in projects

Projects with a flat list of tasks are difficult to manage and take longer to be displayed in Project Worksheet because all of the tasks must be displayed each time you access the worksheet. In contrast, when the tasks in a project are organized in a hierarchy, you can expand and collapse sections to focus on the data that you need to modify.

Grant "view project" access to summary task managers

Grant **View project** access to summary task managers so that they can view the entire project in Project Worksheet. Otherwise summary task managers can only view the tasks under their summary tasks, and if they make changes, the values will be rolled up to include only the amounts from their summary tasks and not the project totals.

Avoid saving the worksheet frequently

Doing work in batches and then saving will result in better performance and less waiting.

Use Firefox or Chrome browsers

The Firefox and Chrome browsers are recommended because they are more efficient at processing data than other browsers.

Do not access different versions of ChangePoint at the same time

If you have access to different versions of ChangePoint for example, in test and production environments, do not access them at the same time because you might encounter issues due to the caching of files. Ensure that you clear your browser cache before signing into a different environment.

Ensure all time records are actual time before marking tasks or task assignments as completed.

The point at which time records are considered actual time by your organization is controlled by a setting in ChangePoint Administration. The setting options are:

- when the time is entered in the time sheet
- when the time records are submitted in the time sheet
- when the time records have been approved

The actual finish date is determined based on the actual time for the tasks or task assignments *at that time that the task or task assignment is marked as completed*. If time records are considered actual time only after time is submitted or approved, and a task or task assignment is marked as completed before the time records have been submitted or approved, there might be an actual finish date, but no true actual hours.

About accessing Project Worksheet

The type of work you can do in Project Worksheet depends on your project role, access rights, and locked state of the project and tasks. The locked state of the tasks is indicated in the **State** column:

Locked state icon	Meaning
	You have locked the task.
	Task is locked by another resource. To view the resource's name, point to the icon.
⊘	You do not have access to lock the task.
[blank]	Task lock has been released and it is available to be locked.

When the project manager or a project plan editor accesses a project in Project Worksheet:

- the project is locked, provided that none of the tasks are locked by other resources. When you have a project locked, "Locked by: me" appears beside the project name. No other resources can lock any tasks unless the project manager or project plan editor unlocks one or more tasks.

  Note: Top-level WBS tasks can be created and activated only when the project manager or project plan editor has locked the project.

- if some tasks are locked, then all of the project tasks that are not currently locked by other resources are automatically locked
- when tasks are locked by summary task managers, the project manager and project plan editors can still view the locked tasks but not edit them
- only the project manager can override the locks that other resources have on tasks

When a summary task manager accesses a project in Project Worksheet:

- all of the tasks in the WBS branches of their summary tasks for the project that are not already locked by another resource are automatically locked
- only the tasks in the WBS structure of the summary tasks and any successor tasks of those tasks are displayed

  Note: It is recommended that summary task managers be granted view access to the project so that they can view the entire project structure.

When tasks are locked by other resources, the lock icon in the **State** column is grayed out. When the tasks are unlocked by the other resource, the lock icon disappears. You can then obtain the locks by reloading the Project Worksheet.

Tip: To identify the resource who has the tasks locked, point to the lock icon.

Note: When a task is locked in Project Worksheet, none of the tasks for the same project can be edited outside of Project Worksheet.

Accessing Project Worksheet

1. Click ⠿ > **Project** > **Worksheet**.

2. Select the project that you want to view in Project Worksheet from the list.

   Project Worksheet appears. The tasks that you have edit access to are automatically locked. If you are the project manager or project plan editor and all the tasks in the project are locked, your name is displayed beside the project name.

About using Project Worksheet

Project Worksheet includes a task view and Gantt chart in the top half of Project Worksheet and a task assignment view and Gantt chart in the bottom half. When you first access Project Worksheet, your default task and task assignment views are displayed. If you change one or both of the views, the same views are displayed until you exit from Project Worksheet.

Task assignments that correspond to the tasks in the task view are automatically displayed in the task assignments view. When no tasks are selected, then all task assignments are displayed. When you select tasks or apply filters to tasks or task assignments, the list of task assignments changes accordingly.

The **Worksheet** toolbar is displayed above the views and includes the actions that apply to the overall worksheet . The task or task assignment view that is currently active displays an **Actions** toolbar below the view. To make the other view active, click anywhere within the view.

Adjusting the task or task assignment view in Project Worksheet

1. To make a task or task assignment view active, click anywhere in the view. The top border of the active view becomes blue, the view name appears in the **Worksheet** toolbar and the **Actions** toolbar appears below the view.

2. To change the height of a view, select and drag the horizontal split bar.

Locking and unlocking tasks

You lock additional tasks by reloading the worksheet after tasks are unlocked by other resources. When you unlock a task, all associated tasks in the WBS structure are also unlocked.

Project managers can override locks on tasks in their projects. When a project manager overrides a lock on a task, all of the task locks that the same resource had locked are overridden.

1. To lock tasks that have become available, reload the worksheet by clicking **Refresh**.
2. To unlock a task, click the lock icon in the **State** column for the task row.
3. To unlock all tasks, click **More** > **Unlock all tasks**.
4. To override the lock that another resource has on a task, do one of the following:
   - To override the locks on some tasks, select the tasks and then click **More** > **Override locks**.
   - To override all locks on all tasks, do not select any tasks (or select all tasks) and then click **More** > **Override locks**

   Warning: When locks are overridden, the resources who previously had the tasks locked will lose all of their unsaved changes.

About the project summary totals in Project Worksheet

The following project summary totals are displayed in the worksheet above the tool bar:

- planned start
- planned finish
- planned effort
- actual effort
- remaining effort

All of the values except for actual effort are updated as you make changes in the worksheet. The actual effort is updated only after you validate the changes or save the worksheet.

Note: The values for draft tasks are included in the project summary totals in Project Worksheet only. Therefore these project summary totals may be different than the values that are displayed in the project profile, which exclude draft task values.

Tip: To obtain the most accurate results for the remaining effort amount, you must enable status updates for all project tasks and ensure that resources update the status of their tasks regularly.

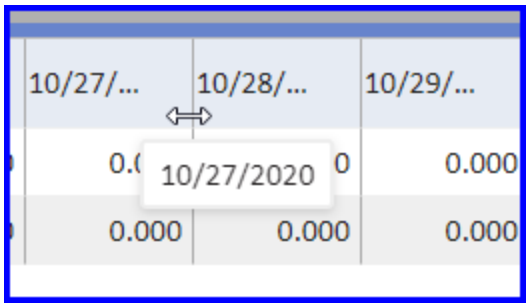
Project Worksheet keyboard shortcuts

Action	Key combination
Add a task row	**Insert** key
Copy selected tasks	Ctrl+C
Go to next cell	Tab
Go back to previous cell	Shift+Tab
Go to row or item above	Up Arrow key
Go to row or item below	Down Arrow key
Edit a text field • Go to the beginning of the text (when the text is highlighted) –Left Arrow • Go to the end of the text (when the text is highlighted) – Right Arrow • Go right within the text – Right Arrow • Go left within the text – Left Arrow • Go right to the next word – Ctrl+Right Arrow • Go left to the next word – Ctrl+Left Arrow	
Expand tasks	Alt+Shift+Plus sign (+)
Collapse tasks	Alt+Shift+Minus sign (-)
Indent selected tasks	Alt+Shift+Right Arrow
Outdent selected tasks	Alt+Shift+Left Arrow
Paste selected tasks	Ctrl+V

Action	Key combination
Search – open the search field Search – move up (or down) through the matching rows	Ctrl+F, F3 F3 (Shift+F3)
Select or clear a check box	Spacebar

Adjusting the width of columns in Project Worksheet

1. Point to the divider between two column headings until the cursor changes to a double-sided arrow.



2. Move the cursor to the desired width.

To adjust the width for all **Effort distribution** columns at once

Note: This adjustment is temporary and applies only while you are working in the current view.

1. Press and hold the **Ctrl** key and point to the divider between two **Effort distribution** columns (daily or fiscal period) headings until the cursor changes to a double-sided arrow.
2. Adjust the column to the desired width. All effort distribution columns are adjusted to the same width.

Expanding and collapsing tasks in Project Worksheet

You can show and hide the subtasks under a task by expanding and collapsing tasks, subtasks, or the entire project as follows:

- To expand a single task or subtask, click the right arrow next to the task or subtask name.
- To collapse a single task or subtask, click the down arrow next to the task or subtask name.

- To expand or collapse all subtasks under a task, click the task row, and then click or .
- To expand or collapse all tasks in a project, do one of the following:
  - ensure no tasks are selected and then click or
  - select all tasks, and then click or

  Note: If the project is large, it may take a while for all tasks to be expanded.

Indenting and outdenting tasks in Project Worksheet

You can indent or outdent one or more tasks at a time.

1. Access Project Worksheet.
2. Select one or more tasks.
3. To indent the tasks, click .
4. To outdent the tasks, click .

Searching in Project Worksheet

You can search for items in Project Worksheet. The search applies to all information that is included in the current worksheet view.

1. Click the search icon .
2. Enter the search text into the search field and then press **Enter**. The number of rows that include matching results is displayed in the search field and the first matching row is highlighted.
3. To navigate through the rows that include matching results, click the up and down arrows in the search field.
4. To close the search field, click the **x** on the right side of the search field.

Moving a task in Project Worksheet

You can move one or more tasks to a different row in Project Worksheet. When you move a task, all of its subtasks are moved, and the row IDs are adjusted accordingly, including in the **Predecessor** column of dependent tasks.

1. Select the tasks that you want to move.
2. Point to the **ID** column.

3. When the cursor changes to a two-headed arrow , drag it to the desired row. A line appears above the row where the tasks will be inserted.

Displaying time periods that start from a specific date in Project Worksheet

To display fiscal or daily periods starting from a specific date, click the **Enter date** icon , specify the date, and then press **Enter**.

The range of fiscal periods, starting with the fiscal period that includes the specified date or the range of daily periods, starting with the daily period for the date, is displayed. If you select a date for which no fiscal or daily periods have been configured, then no periods are displayed at all.

Displaying different fiscal periods or daily periods in Project Worksheet

When fiscal periods have been selected for a project, you can display different fiscal periods, or daily periods in Project Worksheet.

Click the **Switch fiscal periods** icon and then select the fiscal or daily periods to be displayed.

Displaying the previous or next specified number of periods in Project Worksheet

1. In the number of periods field 31 , do one of the following:

   - for fiscal periods, enter a number (*x*) between 1 and 24 for the number of fiscal periods that you want the starting fiscal period to change by
   - for daily periods, enter a number (*x*) between 1 and 31 for the number of daily periods that you want the starting fiscal period to change by

2. To display the range of periods that starts with the *x* number of periods before the current starting period, click .

3. To display the range of periods that starts with the *x* number of periods after the current starting period, click .

About printing in Project Worksheet

You can print Project Worksheet by clicking **More** > **Print**. The printout includes each row, but only includes the columns and portion of the Gantt chart that are displayed in the current view.

Running a report from Project Worksheet

You can run reports from Project Worksheet. Reports that are configured to be launched from either the project or task profile page will be available.

When a report is run from Project Worksheet, the following differences apply:

- links to entity records are not available
- draft tasks will appear in reports only if the report is based on the unsecured Cognos data model

To run a project report

In the **Worksheet** toolbar, click **Reports**, and then select the project or task report.

To run a task report

1. Select a task row.
2. In the **Worksheet** toolbar, click s**Report** and then select a task report from the list that appears.

Exporting Project Worksheet data to Microsoft Excel.

You can export the worksheet data in the current view to a Microsoft Excel spreadsheet.

> **Tip:** To be able to sort the rows by WBS order in Excel, be sure to include the **WBS** field in the view.

Click **More > Export to Excel**.

Copying values in rows in Project Worksheet

You can copy a value from a column in a source row to one or more target rows that are below the source row. You can copy a value from any of the columns in the current Project Worksheet view, except for the **Resources** column.

1. In Project Worksheet, select the source row that contains the value that you want to copy.
2. Select one or more target rows that are below the source row.
3. Click **Fill down**, and then select the name of the column that contains the value that you want to copy.

   The value is copied to each of the target rows.

Saving baselines in Project Worksheet

To save a project baseline

Click **More** > **Save project baseline**.

The baseline information is saved to the project profile.

To save a task baseline

1. Select the task row.
2. Click . One of the following occurs:
   - The baseline information is saved to the task profile.
   - If the option to save task baselines without affecting higher level tasks has been enabled on the project, then the **Save Baseline Options** dialog box appears.
3. In the **Save Baseline Options** dialog box, select one of the following options:
   - To save the baseline as usual, select **Baseline all tasks above and below the selected task**.
   - To save the baseline without affecting higher level tasks, select **Baseline only the selected task and tasks below it**.
4. Click **OK**.

About using Project Worksheet for time-based projects

For time-based projects, you use Project Worksheet only to create the tasks to be assigned using Service Scheduler. The assignments that are created in Service Scheduler are displayed in Project Worksheet with the following limitations:

- assignments are read-only and can only be edited in Service Scheduler
- the effort for an assignment is displayed on the start date of the assignment, even when the assignment spans over two calendar days. For example, you create an assignment with a two hour duration from 11:00 PM February 1 to 01:00 AM February 2. The same assignment in Project Worksheet is displayed on February 1 with a planned effort of two hours.
- open tasks and task dependencies are not supported
- summary tasks do not support time-based assignments, but the subtasks do

- time-based projects can be copied but their assignments cannot be copied

  Note: In the above case, time entry restrictions for the task will not be effective because the restrictions cannot be applied to the individual assignment time slots.

About Project Worksheet views

Project Worksheet views control the data that is displayed in Project Worksheet. There is a default view for tasks, which contain a subset of the task fields. You can edit the default task view as well as create your own task and task assignment views.

Task views

You use task views to do the following:

- create tasks
- edit task fields
- create task assignments that use the default loading method

In general, task assignments that are created in the task view automatically inherit the values of the task fields that are displayed in the task view when the task assignment is created.

In some cases, you might not be able to edit the planned start, planned finish, or planned effort in a task view (for example, if any assignments have a manual loading method). In these cases, you must switch to a task assignment view.

Task assignment views

You use task assignment views to do more detailed assignment work such as:

- manually distribute effort to daily or fiscal periods
- use different loading methods for assignments for the same task
- assign different planned start and planned finish dates to assignments for the same task
- change the assigned resource
- add additional resources to a task once one or more of the points above apply to it

  Note: Only task assignments are displayed in a task assignment view. Therefore there must be at least one existing task assignment for a task before you can assign additional resources to the task.

You add a new task assignment or copy a task assignment based on an existing task assignment. New task assignments have current dates and inherit the default loading method only. Copied task assignments are the same as the original task assignments but do not have the assigned resources.

About creating Project Worksheet views

You can create your own task views or task assignment views, where you do the following:

- include either task or task assignment fields
- specify the standard and configurable fields that are displayed as columns in Project Worksheet
- add columns to, and remove columns from, the frozen pane
- change the order of the columns
- specify a view as your default view
- share your views with other resources
- specify a sort order for the rows

  Note: Only the values of fields that are in a view that has been displayed in the current Project Worksheet session are inherited or copied when you create or copy a task or task assignment, or replace assigned resources.

About related columns

The following pairs of columns are related and either must be updated at the same time, or the value in one affects the value in the other. Therefore it is best to display both columns in the worksheet if you plan to work with them:

- **Billing role** and **Billing role expiry date**. If you change the billing role, you must specify the date *after which* the new billing role becomes effective.
- **Billable task** and **Effective date**
- **Billed to fixed-fee portion of the contract** and **Fixed fee**
- **Work code category** and **Work code**
- **Work location group** and **Work location**
- **Locked** and **Include in resource demand**

- **Open task** and **Assignment planned hours**

Creating a Project Worksheet view

1. Access Project Worksheet.
2. Click the **Switch or manage views** icon > **Manage views**.
3. In the **Manage Views** dialog box, do one of the following:
   - To create a new view, click **New**.
   - To copy an existing view:
     - In the **Views** list, select the view that you want to copy.
     - Click **Copy**.
4. Complete the fields as required. For more information, see:
   - "Manage Views (Project Worksheet) dialog box options" on the next page
   - "Available columns for Project Worksheet task views" on page 95
   - "Available columns for Project Worksheet task assignment views" on page 100
5. To add columns to the view, in the **Available columns** list, do one of the following:
   - select one or more columns and then drag them to a specific location in the **Selected columns** list
   - double-click a column to add it to the bottom of the list in the **Selected columns** list
   - select one or more columns and then click

   Tip: You can filter the columns by typing the column name in the **Filter available columns** field.
6. To prevent a column from scrolling horizontally, click the **Frozen** check box.

   Note: Frozen columns must be placed together at the top of the **Selected columns** list before columns that are not frozen.

   Note: Do not select this option for the **Effort distribution** column because it can cause issues due to its size.
7. To remove a column from the view, do one of the following:

- double-click the column or click
- drag the column to the **Available columns** list
- select one or more columns and then click

8. To move all of the columns in a section at once, click **Select all**, and then drag the columns to the desired list, or click or .
9. To change the order of the columns, select a column name and then drag it to the desired position in the list. The columns display left to right in Project Worksheet in the order that they are listed in the **Selected columns** lists.
10. When you are finished, click **Save**.

Manage Views (Project Worksheet) dialog box options

Option	Description
View list	Current view.
Name field	Name for the view.
Type of view field	Option to select whether the view displays tasks or task assignments.
Share view with others check box	When selected, allows other resources to use the view. Available only if you have the access rights to share views.
Set as my default view check box	When selected, makes the current view the default view for the current resource and removes the default status from the view that was previously specified as the default, if applicable.
Available Columns section	
All columns list	List of available entity fields to be displayed as columns.
Selected Columns section	
Frozen check box	When selected, the column remains in place even when you scroll horizontally. The order of the columns from top to bottom in the list is the order that the columns display in Project Worksheet from left to right.

Option	Description
Sort data in section	
Sort by column data list	Determines the sort order for the rows. For more information, see "Sorting the rows in Project Worksheet " on page 104.

Available columns for Project Worksheet task views

Column name	Description
Actual finish date field	Date of the latest time record or the date that the task is marked as completed.
Actual hours field	Total number of hours of work that have been entered for the task.
Actual start date field	Earliest date that hours have been entered for work done for a task.
Add to calendar check box	When selected, the planned hours for the task are included in the personal calendars of the assigned resources and the resource scheduling calendar.
Allow work code override check box	When selected, resources can choose a different work code when they enter time for the task.
Allow work location override check box	When selected, resources can choose a different work location when they enter time for the task.
Assignment planned hours field	For open tasks only. Planned hours for new task assignments that are created when a resource enters time for the open task. This field is not available when resource restrictions or resource leveling is enabled.
Baseline finish date field	Latest planned finish date of all task assignments and subtasks, as at the last time a baseline was created for the project or task.
Baseline hours field	Total planned hours for project tasks.

Column name	Description
Baseline start date field	Earliest planned start date of all task assignments and subtasks, as at the last time that a baseline was created for the project or task.
Billable task check box	When selected, indicates that the task is billable.
Billed to fixed-fee portion of the contract check box	When selected, bills the task to a fixed-fee portion of the contract. The time entered for this task does not display on the invoice.**Note:** Changing the setting affects all uninvoiced time.
Billing role field	Default billing role for resources that are assigned to the task. The billing roles come from the contract.
Capital check box	When selected, designates the task as a capital cost.
Comments field	Additional information about the task.
Completed check box	When selected, sets the task to completed status. Typically used for tasks that are not assigned to resources, such as milestone tasks. When a task is set to complete, the status for the task assignments is automatically set to complete. The task is automatically set as completed when any of the following occur: • all of its task assignments are completed • Percent complete is set to 100 • Remaining effort set to 0
Contract product field	Products that are associated with the contract and for which the **Allow selection on tasks** option has been selected. When a contract product is associated with a task, it can be invoiced based on the status of the task.
Contract product ready to invoice check box	When selected, the contract products that are associated with the task become available for invoicing.

Column name	Description
Credit GL account list	Credit account for revenue realized on billable time. This field is available only if you select a revenue recognition method for time.
Critical check box	Read-only. When selected, indicates that task is on the critical path for the project.
Debit GL account list	Debit account for revenue realized on billable time. This field is available only if you select a revenue recognition method for time.
Draft check box	Read-only. When selected, indicates the task is draft.
Duration field	Number of working days between planned start and planned finish dates of the assignment. If no assignments exist or multiple assignments exist, the working days come from the staffing workgroup of the contract. Changing the value to 0 automatically makes the task a milestone and enables the **Milestone** option and sets the planned hours to 0.
Effective date field	The date of the new billable status for the task if the billable status of the task has been changed. The new status is applied to all uninvoiced time records dated on or after the specified date. **Tip:** To clear all existing history of changes to the billable status and apply the new status to all uninvoiced time records, you can leave the field blank.
Effort Distribution columns	Displays daily or fiscal period columns for allocating planned effort manually or automatically, depending on the loading method.
Fixed fee list	Deliverable to which the task is associated, if the **Billed to fixed-fee portion of the contract** option is selected. Specifying a deliverable allows costs and revenues to be tracked against fixed fees.

Column name	Description
Forecast finish date field	Estimated date that the task will be completed.
Forecast start date field	Estimated date that work will begin for a task.
Function list	Default job function for resources that are assigned to the task. You can override the default for task assignments.
ID	Row identifier for use in task dependencies. Also used for moving tasks where applicable.
Include in resource demand check box	When selected, new task assignments created for this task are included in resource demand analysis by default. Selected by default on new tasks. You can override the default for task assignments.
Locked by field	Read-only. Resource who has locked the task.
Locked task check box	When selected, prevents resources from entering time for the task assignments for the task. However, you can change the setting for individual task assignments.
Milestone check box	When selected, indicates that the task is a milestone. Milestones are displayed as diamond-shaped icons in the Gantt chart. When first selected, the duration and planned hours are automatically set to 0.
MSP WBS number field	For MSP projects only. The Microsoft Project work breakdown structure number for the task.
Open task check box	When selected, makes the task an open task and the **Assignment planned hours** field appears. For more information, see "Open tasks" on page 51.
Open task restriction check box	Read-only. When selected, access to the current open task has been restricted.

Column name	Description
Phase	Specifies the project phase that the task belongs to.
Planned finish	Date that work for the task is scheduled to finish.
Planned hours	Estimated effort that is required to complete the task. If you use the **Resources** list on a task view to assign more than one resource, the effort is initially split evenly among the resources.
Planned start	Date that work for the task is scheduled to start.
Predecessors	Task ID of the task on which the current task has a dependency.
Primary product field	Read-only. Primary product that is associated with the task. For information about how to specify or change the primary product, see "Specifying a primary product for a task in Project Worksheet" on page 114.
Product list	Product associated with the task for reporting purposes. That is, you can create reports based on the products that are associated with the tasks.
Remaining hours field	Number of planned hours remaining to complete the task, based on resource status updates.
Request type-ahead field	Number of the request that is associated with the task.
Resources list	Resources who are assigned to the task.
Status not required check box	When selected, resources are not required to update the status of their task assignments. The project rollup calculates the remaining hours as planned hours minus actual hours. If the actual hours are greater than the planned hours, remaining hours will be set to 1. The option can be overridden on the task assignments.
Task name field	Name of the task.

Column name	Description
Utilization eligible check box	When enabled, the task time is included in the utilization for assigned resources.
WBS field	Work breakdown structure for the task.
Work code category list **Work code** list	Work code category and work code of the task. Can be used for taxation and reporting purposes. Can be used for reports and calculating taxes.
Work location group list **Work location** list	Work location group and work location where the work will be performed. Can be used for reports and calculating taxes.

Available columns for Project Worksheet task assignment views

Option	Description
Actual finish date field	Date of the latest time record or the date that the task assignment is marked as completed.
Actual hours field	Total number of hours of work that have been entered for the task assignment.
Actual start date field	Earliest date that hours have been entered for work done for a task assignment.
Allow work code override check box	When selected, resources can choose a different work code when they enter time for the task assignment.
Allow work location override check box	When selected, resources can choose a different work location when they enter time for the task assignment.
Assignment comments field	Additional information about the task assignment.
Baseline finish date field	The finish date of the last baseline that was saved for the task assignment.

Option	Description
Baseline hours field	The planned hours of the last baseline that was saved for the task assignment.
Baseline start date field	The start date of the last baseline that was saved for the task assignment.
Billing rate field	Read-only. Billing rate for the assignment and which is in effect as at the planned start date for the assignment. For more information, see "About billing rates for contracts" in the *Contract Management User Guide*.
Billing role expiry date	If the billing role is changed, the date *after which* the new billing role becomes effective.
Billing role field	Billing role for the task assignment. The available billing roles come from the contract.
Completed check box	Read-only. When selected, the task assignment has been set to completed status. Typically used for tasks that are not assigned to resources, such as milestone tasks. When a task is set to complete, the status for the task assignments is automatically set to complete. The task is automatically set as completed when all of its task assignments are completed.
Cost rate field	Read-only. The billing role-based or resource-based cost rate that applies to the task assignment and which is in effect as at the planned start date of the task assignment.
Draft check box	Read-only. When selected, indicates the task is draft.
Duration field	Number of working days between planned start and planned finish dates.
Effort Distribution columns	Displays daily or fiscal period columns for allocating planned effort manually or automatically, depending on the loading method.

Option	Description
Forecast finish date field	Estimated date that the task assignment will be completed.
Forecast start date field	Estimated date that work will begin for a task assignment.
Function list	Job function for the task assignment. The default function comes from the task, but you can override the function on task assignments.
Include in resource demand check box	When selected, the task assignment is included in resource demand. You can override the setting for task assignments.
Last status date field	Most recent date that the status was updated for the task assignment.
Loading method field	Loading method for the task assignment.
Locked by field	Read-only. Resource who has locked the task.
Locked task check box	When selected, prevents the resource from entering time for the task assignment. The setting is inherited from the task but can be changed on task assignments.
Percent complete field	Percentage of the planned effort for the task that has been completed.
Planned finish date field	Estimated date that the assignment will be completed. The default date is the day after the planned start date. For manual loading methods, the planned finish date must be on or later than the last date that contains effort.
Planned hours field	Estimated number of hours required to complete the assignment. If the loading method is manual, then the planned hours cannot be edited. If the loading method is one that updates past periods, then the planned hours must be equal to or greater than the total number of actual hours in past periods.

Option	Description
Planned start date field	Date that the work should begin. The default date is the date that the task assignment is created. If the loading method is manual, then the date must be on or before the earliest date that contains effort.
Remaining hours field	Number of hours remaining to complete the task.
Requested Resource field	Read-only. Resource that was requested on the associated resource request.
Resource comment field	Resource's comment from the task status update.
Resource list	Resource who is assigned to the task.
Resource Request number field	Number of the resource request.
Soft-booked check box	When selected, the resource is tentatively booked for planning purposes. Soft-booked time is shown as flexible on the resource schedule calendar. When cleared, the resource is committed to the project.
Status not required check box	When selected, resources are not required to update the status of their task assignments. The project rollup calculates the remaining hours for assignments that do not require updates as planned hours minus actual hours. If the actual hours are greater than the planned hours, the remaining hours is set to 1.
Status up to date check box	Read-only. When selected, indicates the task status is current.
Task name field	Read-only. Name of the task.
WBS order field	Read-only. Number for the task that corresponds to the order of the work breakdown structure. It can be used for sorting purposes in views and when exporting data to Excel.

Option	Description
Work code category list **Work code** list	Work code category and work code of the task. Used in reports and for calculating taxes.
Work location group list **Work location** list	Work location group and work location where the work will be performed. Used in reports and for calculating taxes.

About sorting rows in Project Worksheet

By default, rows in Project Worksheet are in WBS order, but you can define a different sort order for rows based on the data in one or more columns. Keep in mind that changing from the default sort order affects how items are displayed and limits the functionality in the worksheet as follows:

- items are listed in a flat list
- Gantt chart is not available
- some column data might be repeated
- you cannot do the following:
  - add or remove rows or reorder rows
  - indent or outdent rows
  - copy and paste rows
  - select or deselect tasks for activation

Sorting the rows in Project Worksheet

You can specify a sort order for the rows based on the data in one or more columns. For example, you can sort task assignments by resource, then by planned start date.

1. Click the **Switch or manage views** icon > **Manage Views**. The **Manage Views** dialog box appears.
2. In the **Sort data in selected columns (Section 2 of 2)** section, drag the column that you want to sort by first to the top of the **Sort by column data** list.
3. To specify the sort order, do one of the following:
   - To sort in ascending order, click the arrows until only the up arrow is displayed.

- To sort in descending order, click the arrows until only the down arrow .is displayed.

4. To sort by additional columns:
   a. Drag the column that you want to sort by second to just below the first column.
   b. Specify the sort order by clicking the arrows, as above.
5. To remove sorting from a column, click the arrows until both the up and down arrows appear.
6. Click **Save**. An arrow in the headers of the columns in the worksheet indicates that sorting (ascending, descending) has been applied.

Editing a Project Worksheet view

You can edit all of the settings for a view except for the view type.

1. Access Project Worksheet.
1. Click the **Switch or manage views** icon > **Manage Views**. The **Manage Views** dialog box appears.
2. From the **View** list, select the view that you want to edit.
3. To delete the view, click **Delete**, and then confirm the deletion.
4. To change the name of the view, type the new name in the **Name** field.
5. Make the necessary changes. For more information, see "Creating a Project Worksheet view" on page 93.
6. When you are finished, click **Save**.

About switching Project Worksheet views and filters

You can temporarily switch the Project Worksheet view by clicking the **Switch or manage views** icon , and then selecting a different view. Similarly you can temporarily switch the Project Worksheet filter by clicking the **Switch or manage filters** icon and then selecting a different filter. The selected views and filters will be displayed until you exit from Project Worksheet.

Note: To display a view or filter each time you access Project Worksheet, you must edit the view or filter and mark it as default.

About filtering data in Project Worksheet

There are two layers of filtering that are available in Project Worksheet. The primary level of filtering is the Project Worksheet filter, which determines the data to be displayed in the worksheet. You can also do ad hoc filtering, which is based on the column data that is displayed in the worksheet, with or without using a Project Worksheet filter.

Note: When you apply a Project Worksheet filter or column filter to a task view, the filter results include the hierarchy of the work breakdown structure (WBS) of the filtered tasks, provided that a sort order for one or more columns has not been specified in the view settings. If a sort order has been defined, the tasks are displayed in a flat list.

For more information, see:

- "About Project Worksheet filters" on page 106
- "About filtering rows based on column data in Project Worksheet" on page 109

About Project Worksheet filters

You filter the data in Project Worksheet by creating a filter and then applying it to Project Worksheet so that only the tasks or task assignments that match the filter criteria are displayed. For example, you can create a filter that displays only the tasks that were created after a specific date, or only the task assignments that have fewer than 8 planned hours.

You base the filter criteria on the data in the task or task assignment fields (columns). There are logical AND and OR operators and parentheses that you can use to create more complex filter criteria.

You can apply a filter only if it is for the same entity type as the current view. The names of the current view and filter are displayed at the bottom left corner of Project Worksheet.

Note: Filter criteria is applied to the values for configurable fields only after the configurable field has been saved, whereas filter criteria is applied to standard field values as soon as the value is entered in Project Worksheet.

Creating a Project Worksheet filter

1. Access Project Worksheet.

2. In the **Worksheet** toolbar, click the **Switch or manage filters** icon > **Manage filters**.

   The **Manage Filters** dialog box appears.

3. Do one of the following:

   - If this is the first filter being created, enter the filter name.
   - If there is a filter name in the **Name** field, click **New.**

4. Complete the fields as required. For more information, see "Manage Filters (Project Worksheet) dialog box options" on page 107.

5. To specify filter criteria:

   a. Click **Add new**.

   b. In the **Filter on** column, select the column that the criteria row applies to.

   c. In the **Condition** column, select the condition for the information in the **Filter on** column.

   d. In the **Value** column, select the values that the condition must meet.

6. To add an AND or OR operator, or parentheses, click in the **Operators** column in the row and then select the item from the list.

7. To add a criteria row, click **Add new** below the last row.

8. To delete a criteria row, click at the end of the row.

9. Click **Save**.

Manage Filters (Project Worksheet) dialog box options

Option	Description
Filter list	Current filter.
Name field	Name of the filter.
Type of filter options	Option to select whether the filter displays task or task assignments.

Option	Description
Set as my default filter check box	When selected, the current filter is automatically applied each time that you access Project Worksheet.
Share filter with others check box	When selected, other resources can use the filter.
Operators columns	Lists of operators (AND, OR) and parentheses for complex filter criteria.
Filter on column	Column or field that the filter criteria applies to.
Condition column	Condition for the criteria row.
Value column	Value for the condition.

Editing a Project Worksheet filter

You can edit the settings for a filter except for the type of filter.

1. Access Project Worksheet.
2. In the **Worksheet** toolbar, click the **Switch or manage filters** icon > **Manage filters**.

   The **Manage Filters** dialog box appears.
3. In the **Filter** list, select the filter.
4. Do one of the following:
   - Make the necessary changes. For more information, see "Creating a Project Worksheet filter" on page 106.
   - To delete the filter, click **Delete**, and then click **OK** to confirm the deletion.
5. When you are finished, click **Save**.

Copying a Project Worksheet filter

You can copy and then edit an existing filter.

1. Access Project Worksheet.
2. In the **Worksheet** toolbar, click the **Switch or manage filters** icon and then select **Manage filters**.

The **Manage Filters** dialog box appears.

3. In the **Filter** list, select the filter that you want to copy, and then click .
4. Complete the fields as required. For more information, see "Manage Filters (Project Worksheet) dialog box options" on page 107.
5. To specify filter criteria:
   a. In the **Filter on** column, select the column that the criteria row applies to.
   b. In the **Condition** column, select the condition for the information in the column.
   c. In the **Value** column, select the values that the condition must meet.
6. To add an AND or OR operator, or parentheses, click in the **Operators** column in the row and then select the item from the list.
7. To add a criteria row, click **Add new** below the last row.
8. To delete a criteria row, click at the end of the row.
9. Click **Save**.

About filtering rows based on column data in Project Worksheet

You can temporarily filter the information that is displayed by specifying filter criteria for the data in one or more of the columns. The filter criteria is based on the data in the column. Depending on the type of data in the column, you can specify one or more specific data values, a range of data values, or the rows that have no value in the column.

The values that are available as filter criteria are based on the values in the rows that are currently in the view. For example, if only active tasks are in the view, there will not be an option to filter on draft tasks.

You can edit column filters by adding or removing the data values.

Note: Unlike Project Worksheet filters, column filters are temporary and remain in effect only until you either refresh or close Project Worksheet.

Filtering rows based on column data in Project Worksheet

Column filters are temporary and remain in effect only while you have Project Worksheet open.

1. Click the column header. The filter criteria appear.

2. Select the filter criteria:
   - For check boxes, select the check boxes for the values that you want to include in the view. To display the rows that do not have a value in the column, select the check box for **(Blanks)**.
   - For a range of values, specify the from and to values. To specify a single value, enter the same value in both fields.
3. Click **OK**. The following occurs:
   - only the rows that include values that match the filter criteria are displayed
   - a filter icon appears to the right of the column name
4. To remove a column filter:
   a. Click the column name. The filter criteria appear.
   b. Click **Clear filter**.
5. To remove the filters from all of the columns, click the **State** column header > **Clear all column filters**.

About creating tasks in Project Worksheet

You can create tasks in Project Worksheet by either adding a new task and then specifying the task details, or by copying an existing task.

When you add a new task, it is inserted into a new row that is under but at the same WBS level as the selected task. If no task is selected, the new task is inserted at the bottom row of the worksheet but at the top WBS level.

Note: Tasks at the top WBS level can be created or activated only by a project manager or project plan editor who has the project locked.

Tip: To minimize the effect on other resources who could be editing other parts of the project, it is good practice to insert tasks where they are least likely to affect the WBS, for example, at the bottom of the task hierarchy or worksheet, or within a summary task.

Summary task managers must select an insertion point that is below the summary task because they do not have edit access to the summary task itself.

About creating milestone tasks

You create a milestone task the same way as a regular task but with the following differences:

- When you select the **Milestone** check box for a task for which the planned start and planned finish are the same date, the duration and planned hours are each automatically set to 0.
- Similarly, when you set the duration for a task to 0 days, then the planned hours is set to 0, the planned finish is changed to the same date as planned start, and the milestone option is enabled automatically.
- You can later increase the duration and planned hours if required, but if the duration is 0, then planned hours must also be 0.

  Note: The task editing screen does not include the **Duration** field, but the behavior is the same. You can view the changes in Project Worksheet.

Creating a task in Project Worksheet

1. Access Project Worksheet.
2. Ensure that a task view is displayed.
3. To create a top-level task, click . The new task row appears on the bottom row.
4. To insert a task into a specific row, click the task row under which you want the new task to be, and then click (or press the **Insert** key). The new task row appears after the subordinate tasks of the task that you clicked.
5. Complete the fields as required.

   For more information, see "Available columns for Project Worksheet task views" on page 95.
6. You can create a summary task by indenting tasks under a task, or outdenting a task over other tasks:
   - To indent a task, select the task and then click (or press Alt+Shift+Right Arrow).
   - To outdent a task, select the task and then click (or press Alt+Shift+Left Arrow).
7. For information about assigning resources, see "Assigning resources to a task in Project Worksheet" on page 118.

8. Click **Save**.

   The draft task is created.

9. To activate tasks, see "Activating a task in Project Worksheet" on page 138

   Tip: To work with task assignment details such as allocating different planned effort to daily or fiscal periods manually to assigned resources, switch to a task assignment view.

About rollup in Project Worksheet

In Project Worksheet, the project data is rolled up automatically as you work so that you can view the effects of your changes to the project totals. Note however, that the totals include only the tasks or task assignments that are currently displayed in Project Worksheet and are not saved until you save Project Worksheet.

For general information about how project data is rolled up, see "About rolling up projects" on page 48.

Note: Only a portion of the project is displayed when a filter has been applied, or if the resource is a summary task manager who does not have view access to the project. Also, summary task totals are not displayed when a sort order is defined in a Project Worksheet view.

About linking tasks in Project Worksheet

You can create dependencies between tasks in the worksheet and the Gantt chart. For more information about using the Gantt chart, see "Linking tasks in the Gantt chart in Project Worksheet" on page 144

Note: Inter-project dependencies between tasks are not supported in Project Worksheet.

You link tasks in the worksheet by specifying the dependency information in the **Predecessors** column of the successor task, using the following format:

[task ID][dependency type][+/–lag time]

Where:

- [task ID] is the number from the ID column
- [dependency type] is the two-letter abbreviation (case-insensitive) for the type:
  - FS – finish-to-start (default type)

Note: Because finish-to-start is the *system* default dependency type, the “FS” is not required, and will be removed if you enter it. This does not apply to your default dependency settings, if set.

- SS – start-to-start
- FF – finish-to-finish
- SF – start-to-finish

- [+/– lag time] – plus sign for lag time, or minus sign for lead time, and the number of working days

For example, if the [task ID] is “3”, dependency type is start-to-start, and [lag time] is two days, then you would enter:

3SS+2

You can add multiple predecessor tasks by separating them with a comma, for example:

3SS+2, 5SF-3

Specifying a default dependency type and lag time in Project Worksheet

The default dependency type for linking tasks is finish-to-start, but you can specify a different dependency type as well as a lag time. If you specify a different default dependency type and lag time, when you enter the task ID in the **Predecessors** field, the dependency type and lag time are added automatically.

For example, you specify **Start-To-Start** as the dependency type and "**4**" as the lag time, and you want to create a dependency for task ID 3. You can simply enter **3** in the **Predecessors** field. When you click out of the cell, "3SS+4" appears automatically. You can specify other dependency types and lag periods as required.

1. Access Project Worksheet.
2. Click **More** > **Project Worksheet settings**. The **Project Worksheet settings** dialog box appears.
3. In the **Task dependencies** section:
   a. In the **Default type** list, select the dependency type.
   b. In the **Lag time** field, specify the number of lag days between the tasks.
4. Click **Save**.

Specifying a primary product for a task in Project Worksheet

When you associate a single product with a task in Project Worksheet, the product is designated as the primary product. When you associate multiple products with a task, the first product that you select is designated as the primary product.

To change the primary product for a task, you must first clear the entries in the **Product** column and then reselect the products, being sure to select the primary product first.

To specify the primary product for a task in Project Worksheet

1. Add the **Product** and **Primary product** columns to the task view.
2. In the **Product** column, select the primary product first, and then select the other products to be associated with the task.
3. Click .

To change the primary product for a task in Project Worksheet

1. Add the **Product** and **Primary product** columns to the task view.
2. In the **Product** column, do the following:
   a. Clear the selected products by clicking , and then selecting the blank line at the top of the list.
   b. Reselect the products, being sure to select the primary product first.
3. Click .

Specifying time entry restriction settings in Project Worksheet

You can specify the time entry restrictions for tasks and task assignments to within the planned dates or planned effort for the task or task assignment.

You can also restrict the time entries for open tasks to selected workgroups and/or roles. For more information, see "Restricting time entries for an open task in Project Worksheet" on page 115.

1. Add the following fields to the Project Worksheet view:
   - Restrict time entries to within the planned dates for the task
   - Restrict time entries to within the planned effort for the task

- Restrict time entries to within the planned dates for the task assignment
- Restrict time entries to within the planned effort for the task assignment

2. In Project Worksheet, edit the settings for tasks or task assignments as required.
3. Click **Save**.

Restricting time entries for an open task in Project Worksheet

By default, all resources can enter time for open tasks. You can restrict time entries for an open task to one or more workgroups and/or roles so that only the following resources can enter time for the task:

- resources who are members of the workgroups that you select
- resources assigned to one of the selected roles that you select

  Note: Resources who are assigned directly to open tasks can always enter time for the tasks and are not affected by time entry restrictions.

1. In Project Worksheet, select the open task and then click . The **Open task** view appears.
2. In the **Time entries are restricted to the selected workgroups and/or roles** section, select the workgroups and roles that can enter time for the open task.
3. To include all of the workgroups under the selected workgroups in the hierarchy, click the **Include all subgroups of selected workgroups** check box.
4. Click **Save**.

To remove access restrictions from an open task

1. In Project Worksheet, select the open task and then click . The **Open task** view appears.
2. In the **Access is restricted to the selected workgroups and/or roles** section:
   - clear the check boxes for all selected workgroups
   - click the x for all selected roles
3. Click **Save**.

Copying a task in Project Worksheet

You can copy one or more tasks and then paste them into Project Worksheet. When you copy a task, all of its subtasks are included. If you copy tasks from different WBS levels, the tasks are pasted into the row below the task that you select as the insertion point, but into the same WBS level as the task.

Values for fields that are included in your view are copied. In some cases, default values are applied to fields that are missing from your view.

1. Access Project Worksheet.
2. Select one or more tasks
3. Click (or press Ctrl+C).
4. Select the row above where you want to insert the tasks, and then click (or press Ctrl+V).
5. Edit the tasks, if required.
6. Click **Save**.

About assigning resources to tasks in Project Worksheet

There are two ways to assign resources to tasks:

- using a task view
- creating task assignments using a task assignment view

  Note: It is best to use a task assignment view for doing detailed work, such as assigning different amounts of planned effort to resources. For more information, see "Creating a task assignment in Project Worksheet" on page 122.

You can assign one or more resources and/or personal groups to a single task or to multiple tasks all at once. You can split the planned effort equally among the resources or specify different effort amounts or percentages for each resource. Percentages of planned effort are calculated based on the total planned effort for the task.

About the preferred resources list in Project Worksheet

The preferred resources list includes the resources that are assigned to tasks in the current project in addition to the resources that you added to the list.

Note: You can add resources to your preferred resources list by clicking **More** > **Manage preferred resources**.

About project teams in Project Worksheet

For projects for which resource requests are enabled, the resources from the project team and resources that are exempt from resource requests are available in place of the preferred resources list. If you assign a task to a personal group, only the resources that are in the project team or are exempt from resource requests are assigned to the task. Only the personal groups that have at least one resource the is from the project team or is exempt from resource requests will be available.

Assigning personal groups to tasks

When you select a personal group in the **Resources** column, all resources in the personal group are assigned to the task, and the planned effort is distributed evenly among the resources. To edit the planned effort amounts manually, switch to a task assignment view.

Assigning multiple resources to a task

When you assign more than one resource to a task, either individually or by assigning a personal group, you can add, edit, and delete resources, and specify the effort amounts for each resource all in one dialog box. If the total of the planned effort that is allocated to resources is different from the total planned effort for a task, you must either update the task total, or adjust the allocated amounts to equal the task total.

If you select a group using the **Assign resources** or **Reassign resources** dialog box, the planned effort or percentage that you specify in the row will be assigned to each member of the group, but can be changed later.

Assigning resources to multiple tasks

Each resource will be assigned to all of the selected tasks, except for the tasks to which they are already assigned, which remain unchanged.

If no resources have already been assigned to the task, you have the option to evenly distribute the planned effort among the newly assigned resources.

Assigning resources to summary tasks

When you select resources in the **Resources** column to assign them to summary tasks, the planned effort is automatically set to 0 because time cannot be entered for summary tasks in a task view.

However, you can assign effort to summary tasks in the **Assign resources** or **Reassign resources** dialog box or in a task assignment view. Total planned effort for a summary task includes the assignments to the summary task as well as its subtasks.

About duration calculations in Project Worksheet

The duration of a task is calculated based on the number of working days between the planned start and the planned finish dates. If no resources are assigned to the task, then the working days of the staffing workgroup of the contract are used. If only one resource is assigned to the task, then the working days of the resource are used.

If more than one resource is assigned to a task, then the working days of the staffing workgroup of the contract are used. The planned start date will be the earliest planned start date of the resources that are assigned to the task, and the planned finish date will be the latest planned finish date.

Note: If you make changes in a task assignment view, the duration is not recalculated for summary tasks. It will be calculated when the project is saved and a rollup occurs. However the rollup values are updated on summary tasks when you make changes in a task view.

Assigning resources to a task in Project Worksheet

1. Access Project Worksheet.
2. In the **Resources** column of the task, select one or more resources or personal groups to be assigned to the task.

   If you assigned personal groups or multiple resources, the planned effort is distributed evenly to each resource.

   If all of the existing assignments have a manual loading method, new resources are assigned 0 planned effort and the existing assignments are not changed.
3. You can change the distribution amounts in the task assignment view.

Assigning resources to multiple tasks in Project Worksheet

The options to allocate effort by percentage and distribute effort evenly are available only when there are no existing assignments for the selected tasks.

1. Select the tasks that you want to assign resources to.

2. In the **Actions** toolbar, click > **Assign**. The **Assign resources** dialog box appears.
3. Do one of the following:
   - To allocate effort based on a percentage of the total effort for the task, select the **Percentage** option.
   - To allocate effort based on the planned effort amounts that you specify, select the **Effort** option.
4. To assign a resource:
   a. In the **Resource** type-ahead field, select a resource.
   b. In the **Effort** (or **Percentage**) column, enter the planned effort (or percentage).
5. To allocate the planned effort evenly to the selected resources click the **Distribute evenly** icon .
6. Click **Save**.

About searching for resources when assigning tasks in Project Worksheet

You can search for resources to be assigned to a task or task assignment. When you select a task or task assignment and then launch **Resource Match**, the planned hours, planned start and planned finish dates, and function from the task or task assignments are automatically loaded into the corresponding sections in **Resource Match**. You can change or add criteria to search for suitable resources i**n Resource Match** and then assign resources from the results.

Note: You can also use **Resource Match** to search for resources without selecting a task or task assignment first, in which case you must define all of the search criteria.

When you launch **Resource Match** from a *task* that has no existing task assignments, a new task assignment is created for each resource that you selected in the **Resource Match** results. The total planned hours for the task is assigned to the first task assignment and you must allocate the planned hours to the remaining task assignments.

If the task has one or more task assignments, then a new task assignment with zero planned hours is created for each resource that you selected in the **Resource Match** results.

When you launch **Resource Match** from a *task assignment*, the currently assigned resource is replaced by the first selected resource and new tasks assignments are created for the remaining resources. If the currently assigned resource has entered time or expenses, it cannot be replaced

and therefore a new task assignment with zero planned hours is created for each new resource to be assigned.

Searching for resources when assigning tasks in Project Worksheet

1. In Project Worksheet, select the task or task assignment that you want to assign resources to.
2. Click . The **Resource Match** dialog box appears.
3. Specify the search criteria. For more information, see "Resource Matches" in the *Resource Management User Guide* or online help.
4. In the **Resource Match Results**, select the check boxes beside the resources that you want to assign to the task or task assignment.

   Note: If you selected a task assignment and want to keep the current resource assignment, select the check box for the assigned resource.
5. Click **Actions** > **Create** > **Task assignment**.
6. Click **Save** in Project Worksheet.

About displaying resource availability in Project Worksheet

You can show either actual effort or availability for task assignments in blue text beside the planned hours.

Keep the following in mind when using this functionality:

- Resource availability is provided only from the current date forward, but planned hours are allocated across the duration of the task assignment, even if the planned start is in the past. Therefore, changing planned start dates in the past can change the allocation of planned hours, which in turn changes the resource availability.
- Overallocations can distort the resource availability. For example, the duration of a task assignment is two weeks, and a resource is overallocated for the first week, but is completely available for the second. Because the total resource availability will be reduced by the number of overallocated hours, it will appear that the resource has less availability than they do.

The resource’s availability is calculated as follows:

Daily capacity * Percent available for planned work – Committed hours

Where:

- **Daily capacity** is the number of hours per working day for the resource.
- **Percent available for planned work** is from the resource's workgroup.
- **Committed hours** includes all demand for all items in the current project and other projects, and in all other demand items that are configured as committed.
- Total availability is calculated from the later of the current date or planned start date to the planned finish date for the task assignment.

  Note: The availability will be recalculated when changes are made within Project Worksheet, but not when demand items are added or edited outside of Project Worksheet.

Showing actual effort or availability in Project Worksheet

You can show either actual effort or availability for task assignments in blue text beside the planned hours in the **Planned hours** and daily or fiscal period columns.

1. Create or switch to a task assignment view that includes the **Planned hours** and **Effort distribution** columns.
2. Click the **Show actual effort or availability** icon , and then select the applicable option.

   The actual hours or availability for the task assignment appears in blue text to the left of the planned hours values.
3. To remove the actual hours or availability, click the **Show actual effort or availability** icon , and then select **None**.

Setting up a warning when effort distribution on task assignments is overridden

You can set up a warning so that a message appears when you a make a change that affects the existing distribution of effort on task assignments.

For example, selecting another resource from the **Resources** list will evenly split the planned effort among resources. If effort is different for task assignments, a warning message appears. The effort amounts are compared up to 2 decimal places.

1. Access Project Worksheet.

2. Click **More** > **Project Worksheet settings**. The **Project Worksheet settings** dialog box appears.
3. In the **Warning messages** section, select the **Display warnings before planned effort is overridden** check box.
4. Click **Save**.

About reenabling the message that the planned effort is different for one or more tasks

You can reenable the message that appears in the **Assign/Replace Resources** dialog box when the total planned effort for task assignments is different than the planned effort for one or more tasks by deleting the server cookies in **My settings**.

Creating a task assignment in Project Worksheet

Use a task assignment view to do more detailed work with task assignments such as:

- manually distributing effort to daily or fiscal periods
- using different loading methods for assignments for the same task
- assigning different planned start and planned finish dates to different resources who are assigned to the same task
- adding additional resources to a task once one or more of the previous points are applicable
- assigning planned effort to summary tasks

Before you can create a task assignment in a task assignment view, there must already be a task assignment for the same task in the task assignment view.

Tip: In a split view, you can select a task in the task view half and then switch to the task assignment view half to create the task assignments.

1. Access Project Worksheet and select a task assignment view.
2. To add a new task assignment, select an existing task assignment for the same task and then click .
3. To copy a task assignment:
   a. Select the task assignment that you want to copy, and then click .

b. Click .

4. Complete the fields as required. For more information, see "Available columns for Project Worksheet task assignment views" on page 100.

5. Click **Save**.

About resource requests and task assignments in Project Worksheet

If your organization uses resource requests, there are restrictions on how you can edit task assignments in Project Worksheet, depending on whether resource requests are enabled at the contract level, project level, or task level.

Note: In all cases, you can create task assignments for resources that are configured to be exempt from resource requests.

If resource requests are enabled at the contract level, then you can create or copy a task assignment for a resource on the worksheet only if there is a resource request for the resource in the **Projected resources** tab of the contract.

If resource requests are enabled at the **Project** level, then the following restrictions apply to the worksheets:

- you can only assign a resource to a task assignment if there is a resource request for the resource that covers the planned start, planned finish and planned hours for the task assignment.
- you can copy and paste a task assignment, but you can save it only if there is a resource request for the resource that covers the planned start, planned finish and planned hours for the task assignment

If resource requests are enabled at the task level, then the following restrictions apply to the worksheets:

- you cannot create or copy and paste task assignments
- you can only reopen resource requests from the task editing view or resource request dialog box
- the following columns are not editable on the worksheets:
  - Resource
  - Planned start
  - Planned finish

- Planned hours
- Effort distribution
- Daily periods
- Loading method
- Open task

Editing a task assignment in Project Worksheet

1. Access Project Worksheet and select a task assignment view.
2. To assign a different resource to a task assignment:
   a. Copy-paste the task assignment.
   b. Assign the resource to the new task assignment.
   c. Delete the old task assignment.
3. Edit the fields as required. For more information, see "Available columns for Project Worksheet task assignment views" on page 100.
4. To delete a task assignment, select the task assignment and then click
5. Click **Save**.

About marking task assignments as completed in Project Worksheet

In a task assignment view, you mark an assignment as completed by setting the percent complete to 100 or remaining effort to 0.

When time has been entered for a task assignment:

- The actual start date is set to the date of the earliest time record and the actual finish date is set to the date of the latest time record.
- If the completed task assignment is later reopened, the actual finish date is cleared, and the actual start date will remain unchanged.

If there are no actual hours for the task assignment:

- The actual finish date is automatically set to the current date, but you can change the date.
- The actual start date is set to the same date as the actual finish date and these dates both roll up to the task and summary tasks normally.

- If the completed task assignment is later reopened, both the actual start and actual finish dates are cleared.

  Note: If you change the actual finish date in a task assignment view, the revised actual start and actual finish dates will not appear in a task view until Project Worksheet has been saved and reloaded.

Best practice regarding actual time

The point at which time records are considered actual time by your organization is controlled by a setting in ChangePoint Administration. The setting options are:

- when the time is entered in the time sheet
- when the time records are submitted in the time sheet
- when the time records have been approved

The actual finish date is determined based on the actual time for the tasks or task assignments *at that time that the task or task assignment is marked as completed*. If time records are considered actual time only after time is submitted or approved, and a task or task assignment is marked as completed before the time records have been submitted or approved, there might be an actual finish date, but no true actual hours.

As a best practice, ensure all time records are actual time before marking tasks or task assignments as completed.

About replacing assigned resources in Project Worksheet

In Project Worksheet you can replace a resource with one or more resources on all tasks in the project or only selected tasks. This functionality is useful for replacing a resource who is leaving the customer or has been removed from a project, or for replacing generic resources with actual resources when template projects are used as a starting point.

When replacing a source resource, you select one or more target resources and specify the percentage of the effort amount that is to be reassigned to each target resource. You can also specify a date range for the resource to be replaced.

A new assignment is created for each target resource based on the information from the source task assignment. Daily effort distributions are multiplied by the percentage, and the total of the daily distributions becomes the total planned effort for the target resource.

- If the percentage is 100% or higher, the source resource is removed from the task, unless there is actual effort for the source resource, in which case the source resource remains assigned to the task with effort set to 0.
- If the percentage is 100% and there are multiple target resources, a slightly higher amount might be assigned to one of the target resources due to rounding.
- If a target resource is already assigned to the source task, the effort will be added to the existing effort for the target task.

  Note: For performance reasons, some processing is not done immediately in Project Worksheet, such as replacing effort in past periods with actual effort. As a result, there may be changes in effort amounts after you save changes or switch to another view.

Replacing an assigned resource in Project Worksheet

1. Do one of the following:
   - To replace a resource on all tasks in the project, in the **Actions** bar click > **Reassign**.
   - To replace a resource on one or more selected tasks:
     - Select the tasks first.
     - In the **Actions** bar click > **Reassign**.

   The **Reassign resources** dialog box appears.
2. In the **From** field, select the source resource (resource that you want to replace).
3. To specify a date range for replacing the resource, enter dates in to the **Start date** and **End date** fields.
4. Add one or more target resources in the **Resource** table.
5. Specify a percentage for each target resource.
6. Click **Save**.

About submitting resource requests from Project Worksheet

You can submit a resource request for a single task or task assignment from Project Worksheet if resource requests are enabled at the task level for the project.

After a resource request has been submitted for a task or task assignment, you can no longer edit the following fields for the task assignment in Project Worksheet. Instead, you must edit the resource request.

- Billing role
- Duration
- Effort distribution
- Function
- Loading method
- Planned start, Planned finish
- Planned hours
- Resource

You also cannot perform the following actions because they affect the values of the fields:

- reassign resources
- delete the task or task assignment
- allocate recurring allocations of planned effort
- replace planned effort with actual or forecast effort

  Note: After the resource request is completed and a resource is assigned to a task assignment, you cannot edit the Planned start, Planned finish, Duration, Planned hours fields for the related task.

Submitting a resource request from Project Worksheet

You can submit a resource request for a resource from a single task or task assignment.

Tip: To view the resource request numbers for task assignments, add the **Resource request number** column to the task assignment view.

1. Select the task or task assignment row, and then click . The **Create Resource Request** dialog box appears.
2. In the **Planned hours** field, enter the estimated number of hours required to complete the task.

3. In the **Start date** field, enter the planned start date for the task assignment.
4. In the **End date** field, enter the planned finish date.
5. In the **Billing Role** type-ahead field, enter a billing role for the task assignment.
6. To request a specific resource, in the **Requested resource** type-ahead field, select the resource.
7. In the **Comments** field, enter instructions for the resource manager.
8. You can select or edit functions and/or specific skills and competencies for the resource request:
   a. In the **General** tab, select the function in the **Function** field. The related qualifications are automatically selected.
   b. Click the **Qualifications** tab, and then select the qualifications.
   c. To mark a qualification as preferred, right-click the qualification and then select **Set as preferred**.
9. Complete other fields as required.
10. Click **Save**.

    If you submitted the resource request from a task, a task assignment is created. The resource request is submitted to the resource manager for approval.

Editing a resource request in Project Worksheet

You can edit a resource request from a task assignment, including updating workflow steps. The changes that you can make depend on your user role and where the resource request is in the resource request workflow.

1. Select the task assignment row that includes the resource request, and then click . The

   Edit Resource Request dialog box appears.
2. Make the necessary changes.
3. In the **Comments** field, provide the reason for the changes.
4. Click **Save**. The resource request is updated and the changes appear in Project Worksheet, provided the related columns are displayed in the task assignment view.

About allocating planned hours in Project Worksheet

The methods that you can use to allocate planned hours depend on whether or not fiscal periods have been selected for the project, and the loading methods that are specified for tasks.

If you select fiscal periods for the project:

- you can allocate planned hours to fiscal periods and edit planned start, planned finish and planned hours, provided that they are in current or future fiscal periods. You require the appropriate security feature to edit information in past fiscal periods.
- the default loading method for tasks is **1 - Auto distribute - update past and future**.

  Note: If you do not want planned hours in past fiscal periods to be updated with actual hours, then you must change the loading method for each task to loading method 3 or 4. For more information, see "About selecting loading methods" on page 129.

If you do not select fiscal periods for the project, then only the following loading methods are available:

- **3 - Manually distribute – no update**
- **4 - Auto-distribute – no update to past** (default)

You can allocate planned hours to nonworking days if the loading method is a manually distribute method. If there are no nonworking days between the planned start and planned finish dates, effort can be allocated to nonworking days either manually or automatically.

You can change a planned start date that is the past when the loading method is one that replaces planned hours in past periods with actual hours, provided that you have access rights to edit data in past fiscal periods.

Note: If you change a planned start date this way, keep in mind that existing actual hours can cause the date to revert back to the original date upon saving. Also, if there are no actual hours at the time that you change the date, actual hours on a future date can change the date automatically.

About selecting loading methods

The default loading method for tasks is:

- if fiscal periods are selected for the project – 1 - Auto-distribute – update past and future
- if fiscal periods are not selected for the project – 4 - Auto-distribute – no update to past

The loading method applies to each task assignment for the task. In Project Worksheet, you can change the loading method for task assignments.

To allocate planned hours, you can select the loading method to specify how planned hours are distributed across fiscal periods, and how (or whether) actual hours are applied to past fiscal periods when the project is rolled up.

When you select a manually distribute loading method, you can manually allocate the planned hours in the current and future fiscal periods. However, you cannot edit the total planned hours for the task assignment.

When you select one of the auto-distribute loading methods, you can update planned start, planned finish and planned hours for the task assignment, but the system automatically allocates the hours to the fiscal periods.

> **Note:** When open tasks are rolled up, the planned hours for the task are evenly distributed to each fiscal period between the planned start and planned finish dates, and planned hours are not rolled up from task assignments. Therefore the total planned hours for open tasks might not balance with the total task assignment hours.

The loading method affects how planned and actual information is rolled up for each task assignment.

0 - Manually distribute – update past only

- Planned hours in past periods are replaced by actual hours
- Planned start and planned finish in past periods are replaced if time records are earlier than the planned start or later than the planned finish. For more information, see "About replacing planned start and finish dates with actuals" on page 131.
- Current and future planned hours are not changed
- Total planned hours are set to: past period hours + current and future planned hours
- Resources can manually update current and future periods

1 - Auto-distribute – update past and future

- Planned hours in past periods are replaced by actual hours
- Planned start and planned finish in past periods are replaced if time records are earlier than the planned start or later than the planned finish. For more information, see "About replacing planned start and finish dates with actuals" on page 131.

- Total planned hours minus planned hours from past periods, are distributed evenly to current and future periods

2 - Auto-distribute – update past only

- Planned hours in past periods are replaced by actual hours
- Planned start and planned finish in past periods are replaced if time records are earlier than the planned start or later than the planned finish. For more information, see "About replacing planned start and finish dates with actuals" on page 131.
- Current and future periods are not changed (unless the resource changes the planned start, planned finish or planned hours)
- Total planned hours are set to: past period planned hours + current and future planned hours

3 - Manually distribute – no update

- Planned hours in past periods are not replaced by actual hours
- Resources can manually update current and future periods
- Resources with the required access rights can manually update past periods

4 - Auto-distribute – no update to past

- Planned hours in past periods are not replaced by actual hours, but can change when planned start, planned finish or total planned hours are changed
- Total planned hours are evenly distributed across the working days between the planned start and finish dates, and the planned hours for fiscal periods (including past fiscal periods) are updated accordingly

About replacing planned start and finish dates with actuals

If the loading method for a task assignment is one that includes “update past”, then if a time record is entered before the planned start date in a past period, the planned start date is changed to the date of the time record. Similarly, the planned finish date in a past period is changed to the date of a time record that is later than the planned finish date.

When the planned start date for a task assignment is changed in this way, then all effort that is allocated to daily periods for the task assignment is deleted.

However, the planned start and finish dates for task-level or project-level resource requests that have resource restrictions enabled will not be replaced with dates of time records if the new dates are outside of the dates for the original resource request item.

Loading method examples

The following table shows the results after a project rollup, of the different loading methods on a task assignment with the following conditions:

- Planned start: September 1
- Planned finish: October 31
- Planned hours: 50
- Fiscal periods selected for the project, and the fiscal periods are months (September, October)
- 20 actual hours were entered during the September fiscal period
- The current fiscal period is October

  Note: All of the tables in the loading method examples show the results after the project has been rolled up.

Loading Method	Total Planned Hours	Fiscal Period September	Fiscal Period October
Original task assignment	50	25	25
0 - Manually distribute – update past only	45	20	25
1 - Auto-distribute – update past and future	50	20	30
2 - Auto-distribute – update past only	45	20	25
3 - Manually distribute – no update	50	25	25
4 - Auto-distribute – no update to past	50	25	25

The following table shows the results of the loading methods on the same original task assignment, but with 60 actual hours entered during the September fiscal period.

Loading Method	Total Planned Hours	Fiscal Period September	Fiscal Period October
Original task assignment	50	25	25
0 - Manually distribute – update past only	85	60	25
1 - Auto-distribute – update past and future	60	60	0
2 - Auto-distribute – update past only	85	60	25
3 - Manually distribute – no update	50	25	25
4 - Auto-distribute – no update to past	50	25	25

The following table shows the results of the loading methods on the same original task assignment, but with 40 actual hours entered in the September fiscal period and the planned hours changed to 60. You can only change planned hours on task assignments that have auto-distribute methods, therefore this example applies to the auto-distribute methods only.

Loading Method	Total Planned Hours	Fiscal Period September	Fiscal Period October
Original task assignment	50	25	25
1 - Auto-distribute – update past and future	60	40	20
2 - Auto-distribute – update past only	70	40	30
4 - Auto-distribute – no update to past	60	30	30

About allocating planned hours to daily or fiscal periods in Project Worksheet

You can allocate planned hours to daily or fiscal periods to individual resources in a task assignment view:

- for fiscal periods, one year of fiscal periods starting from the fiscal period that contains the current date is displayed

- for daily periods, 31 days from the current date are displayed initially

You can scroll backward and forward within the fiscal periods, or set a different start date for them.

To display daily or fiscal periods in Project Worksheet you must add the **Effort distribution** column to the view.

Using different fiscal periods in Project Worksheet

By default, the fiscal periods come from the billing office for the project. You can use different fiscal periods (if available) in Project Worksheet without changing the project billing office. For example, you might want to use daily or weekly periods for the current time period, and then switch to monthly periods for future time periods.

When you switch from fiscal periods to daily periods, the daily periods start at the first date of the first fiscal period that was in the view prior to switching. When you switch from daily periods to fiscal periods, the fiscal periods start at the one that contains the first date of the daily periods that were in the view prior to switching.

Whichever periods that you use last are saved in Project Worksheet until you switch them again.

> **Note:** Regardless of which periods you use in the view, the project data is always rolled up and stored in the fiscal periods that come from the billing office for the project.

Allocating recurring planned effort in Project Worksheet

You can allocate recurring effort in Project Worksheet within a date range. There are weekly and monthly options. For example, you can allocate effort for a task assignment for every day during a project, or for a task assignment that must be performed at the end of each month.

The recurring effort allocation replaces existing effort allocations for the selected demand items within the specified date range. Any existing effort allocations for the selected demand after the date range are removed.

> **Note:** It is not possible to allocate recurring effort for time-based tasks.

1. In Project Worksheet, display a task assignment view with daily distributions so that you can view the results of your work.
2. Select the task assignment that the recurring demand will be allocated for.
3. Click .

The **Recurring allocations** dialog box appears.

4. Enter the date range, and the number of hours for the recurring allocation.
5. In the **Recurrence pattern** section, select either the weekly or monthly options. You can override one or more daily amounts in the weekly options, if necessary.
6. Click **Save**. The demand is allocated according to the options that you selected.

Using a formula to allocate recurring planned hours in Project Worksheet

You can allocate planned effort of the same amount over a number of consecutive daily or fiscal periods.

To allocate planned effort over daily or fiscal periods that are not consecutive, see "Allocating recurring planned effort in Project Worksheet" on page 134.

To allocate the same number of planned hours to consecutive daily or fiscal periods

Using the following formula, enter the recurring planned hours into the daily or fiscal period where you want the allocations to begin:

```
[Planned hours amount]x[Number of daily or fiscal periods]
```

For example, to allocate 5 hours each to the next 10 daily or fiscal periods, enter "5x10" in the first daily or fiscal period.

To evenly distribute planned hours over consecutive daily or fiscal periods

Enter the recurring planned hours based on the following formula into the daily or fiscal period where you want the allocations to begin:

```
[Planned effort amount]/[Number of daily or fiscal periods]
```

For example, to evenly distribute 50 hours over the next 10 daily or fiscal periods, enter "50/10" in the first daily or fiscal period. Five hours would then be allocated to each of the 10 consecutive daily or fiscal periods.

About replacing planned effort or forecast effort in Project Worksheet

This topic describes the options for replacing planned or forecast effort in Project Worksheet.

Replace planned effort with past actual effort plus forecast effort

This option applies only to task assignments with auto-distribute loading methods.

When this option is selected:

- Planned effort in past days or fiscal periods is replaced with the actual effort.
- Planned effort on the current date or in the current fiscal period is replaced with remaining hours, which are evenly distributed in the current fiscal period
- Planned effort is replaced up to the current date or fiscal period, or the specified date, depending on the Project Worksheet settings

Replace past planned effort with actual effort

This option applies to all loading methods.

When this option is selected:

- Planned effort in past days or fiscal periods is replaced with actual effort, up to the current date or fiscal period, or the specified date (if selected on the Project Worksheet settings).

  Note: The default Project Worksheet settings for replacing past effort do not apply to loading methods that replace past planned effort with actual effort (loading methods 0, 1, 2).

- If actual effort exists:
  - total planned effort becomes the total of actual effort that replaced planned effort (up to the current date or fiscal period, or the specified date), plus planned effort in the current and future fiscal periods or up to the specified date
  - planned start date is changed to the actual start date; planned finish is not changed
- If there is no actual effort:
  - total planned effort is the total of all past, current and future effort distributions
  - planned start date is not changed

Replace forecast remaining effort with planned effort minus actual effort

This option does not affect planned hours, and applies to all loading methods.

When this option is selected, remaining effort is replaced with planned effort less the actual effort.

Note: Remaining effort is not replaced if the actual effort up to the specified or current date exceeds the planned effort.

Replacing planned effort or forecast effort in Project Worksheet

1. In the **Worksheet** toolbar, click **Replace effort** and then select the option:
   - Replace planned effort with past actual effort plus forecast effort
   - Replace past planned effort with actual effort
   - Replace forecast remaining effort with planned effort minus actual effort
2. If the **Replace effort** dialog box appears, select the end date and then click **Save**.

Specifying the default settings for replacing past effort in Project Worksheet

You can specify the default settings for when you want to replace planned effort in past periods with actual effort.

You can specify whether the planned effort in past periods is replaced with all of the existing actual effort, or only up to a date that you specify at the time when you want the effort replaced. You can also specify that only the effort for task assignments that have actual effort be replaced.

1. In Project Worksheet, click **Replace effort** > **Manage Settings**. The **Replace effort settings** dialog box appears.
2. In the **Replace past planned effort with actual effort** section:
   - To replace the planned effort in past periods with all actual effort for those past periods, select **Up to the current date**.
   - To replace the planned effort only up to a date that you specify at the time that you select the option to replace the planned effort, select **Up to a specified date**.

   Note: This setting applies only to loading methods that do not replace past planned effort with actual effort (loading methods 3 and 4).
3. To replace the planned effort in past periods only for task assignments that have actual effort for the past periods, select the **Do not replace planned effort when actual effort is 0** check box.
4. Click **Save**.

About activating tasks in Project Worksheet

You must activate tasks in Project Worksheet before they are available to resources in the time sheet and **Projects** tree-view.

To activate a task, you must first mark it for activation. When you mark a task for activation, all of the tasks in the same task hierarchy and all of the tasks linked to the tasks in the hierarchy are marked as well. For this reason, tasks can be activated only from a task view that has no sorting or filter applied.

Once you have marked tasks for activation, you cannot make any edits to the tasks that affect the WBS or task dependencies.

You can choose to automatically mark tasks for activation by selecting the option in Project Worksheet settings. For more information, see "Automatically activating draft tasks in Project Worksheet" on page 139.

When you mark tasks for activation and then click **Save**:

- all active tasks that you modified and all draft tasks that you marked for activation will be validated in a background process
- active tasks that pass validation are saved
- all draft tasks are activated only if they all pass validation (none of the draft tasks are activated if one or more fail validation)
- warnings are cleared
- Project Worksheet is closed and errors appear the next time you access Project Worksheet

  Tip: To review error and warning messages immediately, click **Apply** instead of **Save** .

Tasks that pass validation are activated and can be viewed and edited in all the usual ways. Tasks that fail validation are flagged and the error messages are available in the **State** column. You can either correct the errors and activate the tasks, or delete them.

Activating a task in Project Worksheet

To activate a task, you first mark it for activation and then submit it for activation. You can remove a task from being marked for activation, but you cannot revert an activated task to draft status.

Note: Tasks at the top WBS level can be created or activated only by a project manager or project plan editor who has the project locked.

1. To mark tasks for activation, select one or more draft tasks, and then click .

   The cell in the **Draft** column turns green.

2. To remove a task from being activated, select the task and then click .

3. To activate the marked tasks, click **Save** or **Apply**.

Validating changes in Project Worksheet

Because only basic validation is performed when you create and edit tasks and task assignments in Project Worksheet, it is possible that you unknowingly introduce errors as you work. You can validate your work to check it for errors so that you can view and correct the errors before activating or saving.

1. Select the draft tasks that you want to validate, and then click .

   Note: Active tasks that have been edited are automatically included.

2. Click **Validate**.

Automatically activating draft tasks in Project Worksheet

You can set an option to automatically mark draft tasks for activation. After you select this option, all existing tasks and new tasks for the current project are activated when you save the project in Project Worksheet. Existing draft tasks in other projects are activated only after you access and then save each project in Project Worksheet.

Note: This setting applies to all projects that you access in Project Worksheet.

1. Access Project Worksheet.

2. Click **More** > **Project Worksheet settings**. The **Project Worksheet settings** dialog box appears.

3. In the **Draft tasks** section, select the **Automatically activate draft tasks** check box.

4. Click **Save**.

About editing tasks in Project Worksheet

Changing the loading method

If you change the loading method for a task assignment from one that does not replace planned hours in past fiscal periods with actual hours to one that does, the planned hours in past fiscal periods will initially be replaced with an even distribution of the total actual hours. To see the true distribution of actual hours in the past, you must save the project in Project Worksheet. Saving the project saves the daily distribution of the task assignment and initiates a project rollup.

Editing the planned start date

When you change the planned start date of a task, the start dates of its task assignments are moved to maintain the same relationship to the task start date. That is, if the original start date of the task assignment was 5 days after the original task start date, then the new start date of the task assignment will be 5 days after the new task start date. The duration remains the same, and the finish date is changed based on the duration.

If the new start date for a task assignment is on a nonworking day, the effort is moved to the next available working day and the new finish date is determined based on the duration, which can move the task finish date. Planned start and planned finish dates can be on nonworking days, but effort can only be allocated to nonworking days manually. If there are no nonworking days between the planned start and planned finish dates, effort can be allocated to nonworking days either manually or automatically.

When you change the planned finish date of a task, the dates of its task assignments are moved relative to the new finish date. The planned start date remains the same and the duration is recalculated.

If dependencies on other tasks prevent the finish date from being moved, or the new finish date is earlier than the planned start date of the task assignment, the task assignment dates are set to same date as the task start date.

Editing a task in Project Worksheet

1. Access Project Worksheet.
2. Check that you have the tasks locked.
3. Make the necessary changes.
4. Click **Save**.

About marking tasks and task assignments as completed in Project Worksheet

In a task view, you mark a task as completed by selecting the **Completed** check box.

If there are actual hours for the task, the following occurs:

- the actual start date is set to the date of the earliest time record and the actual finish date is set to the date of the latest time record.
- The actual start date, finish date, and completed status are applied to all subtasks and task assignments that are not completed and have no actual hours.
- If a task assignment has actual hours, the actual start date is set to the date of the earliest time record and the actual finish date is set to the date of the latest time record.
- If the completed task is later reopened, the actual finish date is cleared.

If there are no actual hours for the task,

- the actual start date is set to the same date as the actual finish date and the actual finish date is automatically set to the current date. You can change the actual finish date.
- If a completed task is later reopened, both the actual start and actual finish dates are cleared and will be updated during the save and project rollup.

About the Gantt chart in Project Worksheet

You can move tasks, change task durations, and create or delete task dependencies within the same project in the Gantt chart.

The items in Project Worksheet are represented in the chart as follows:

- tasks – blue bars
- summary tasks – dark gray bars
- milestone tasks – black diamonds

To show/hide the Gantt chart

In the **Gantt** toolbar, click .

To align both Gantt charts

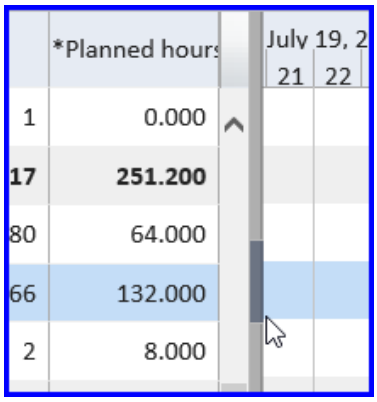
To align the display of the Gantt charts to match the Gantt chart in the active view, click .

The following items are changed to match the active Gantt chart:

- position of the split bar
- starting date
- timescale (zoom level)

To show/hide the worksheet

Click the darker **Show worksheet/Hide worksheet** bar in the split bar between the worksheet and the Gantt chart.



To scroll outside of the time frame that is currently displayed

There is a second set of arrows in the horizontal scroll bar of the Gantt chart that you can use to scroll outside of the time frame that is currently displayed.

To scroll to dates prior to the earliest date displayed, click the arrow on the far left.

To scroll to dates after the latest date displayed, click the arrow on the far right.

To scroll vertically on the Gantt chart

To scroll up or down in the Gantt chart, you use the scroll bar that is between the worksheet area and the Gantt chart.

Changing the timescale in the Gantt chart in Project Worksheet

You can zoom in to show less information in greater detail, or zoom out to show more information in less detail.

To change the timescale in the Gantt chart

To zoom in, click . The lowest zoom level shows the timescale in days per week.

To zoom out, click . The highest zoom level shows the timescale is semiannual.

To display the entire Gantt chart in the available space

Click . The Gantt chart is scaled to fit in the width of the pane.

To start the time frame displayed in the Gantt chart at the planned start date of a task

Click the task row and then click .

To start the time frame displayed in the Gantt chart at a specific date

Click the **Go to the selected date** date at the bottom right of the Gantt chart and then select the date.

Managing tasks in the Gantt chart in Project Worksheet

You can change the planned start date of a task by moving it forward or back in the timescale. The duration for the task remains the same. If you move a predecessor task, its successor tasks are moved automatically to maintain the constraints of the dependency type.

You can change the planned finish date of tasks as well as shorten or lengthen their duration by moving the right (planned finish) end of the task bar.

> **Note:** You cannot move a successor task, nor change its dates that are dependent on its predecessor task.

To change the planned start date for a task

Point to the task, and when the four-sided arrow appears, move the task forward or back to the desired date.

To change the planned finish date for a task

Point to the right (planned finish) end of the task bar, and when the two-sided arrow appears, drag the end to the desired date.

Linking tasks in the Gantt chart in Project Worksheet

Tasks that you link in the Gantt chart initially have the system default dependency type (finish-to-start) unless you set up a different default dependency type. You can change the dependency type and add a lag or lead time.

1. Click the predecessor task, and then drag it down towards the successor task.

   A tooltip indicates the potential successor tasks as you point to them.

2. Release the predecessor task on the successor task.

   The successor task is moved to start on the first working day after the finish date of the predecessor task. A line links the predecessor task to the successor task.

3. To change the dependency type, right-click the link and then select the dependency type.

4. To add a lag, in the **Predecessors** column, add `+n`, where *n* is the number of lag days (or `-n` to specify lead time).

To unlink tasks

Right-click the dependency link, and then select **Delete**.

7. Reporting Project Progress

Viewing the Task Status Compliance report

Project managers can access the **Task Status Compliance** report to view and update the status of tasks in their projects.

1. Click > **Analytics** > **Reports**.

   The **Reports** tree view appears.

2. Expand the **Project Management** folder.

3. Select the **Task Status Compliance** report.

   The filter criteria window appears.

4. To include subprojects in the report, select the **Include subprojects** check box.

5. To include completed tasks, select the **Include completed tasks** check box.

6. In the **Project** list, select one or more projects.

7. Click **Go**.

   The **Task Status Compliance** report appears.

8. To update the status of a task:

   a. Click or the task name in the task row. The **Update Task Status** dialog box appears.

   b. Update the status. For more information, see "Update Task Status dialog box options" in the *Time and Expense Management User Guide*.

8. Microsoft Project Integration

About Microsoft Project integration

The integration of ChangePoint with Microsoft Project combines the benefits of high-level planning options and detailed task lists from Microsoft Project with the capture of time and status information in ChangePoint.

After a ChangePoint project is linked to Microsoft Project (called a linked MSP project), the project manager creates the tasks and resource assignments in the MSP project, and resources update their task status in ChangePoint. The actual data from the task status updates is transferred to the linked MSP project when the project manager updates the linked MSP project.

Although ChangePoint does not integrate with Microsoft Project calendar functionality, the project manager can transfer nonworking days from ChangePoint to the Microsoft Project calendar and set the resource maximum units based on the resources' available hours per day. Also, if the option to update the calendar is enabled for a task in ChangePoint, the personal calendar will be updated for resources who are assigned to the task in the linked MSP project.

> **Note:** Depending on the Microsoft Project version used in your organization, procedures may differ. For more information, see the Microsoft Project help.

About data transfer between linked MSP projects and ChangePoint

The first time that you link a ChangePoint project to Microsoft Project, the system creates a new MSP project with the same name as the ChangePoint project. The MSP project is stored in a temporary Microsoft Project file (.mpp) on your computer while you are working with it. When you save and exit from Microsoft Project, the linked MSP project is saved in ChangePoint.

The following information in the ChangePoint project is transferred to the new MSP project:

- Project name
- Resources
- Resource cost information, if the project manager has access rights
- Planned, actual, remaining and baseline start and end dates
- Planned hours

- Tasks and task dependencies within the project

All tasks automatically have the fixed duration task type, regardless of the Microsoft Project default setting. The task duration, work start and finish match the values from ChangePoint. After the project is linked, you can change the task type to fixed work or fixed units in Microsoft Project and the values will be recalculated.

When you edit and save a linked MSP project, the following information is transferred back to the ChangePoint project:

- Task names
- Project planned start date
- Planned start and finish dates of tasks
- Phase information for tasks
- Resource assignments
- Work breakdown structure

After the transfer, the information is automatically distributed to project resources. If resource leveling is enabled for your organization, the system validates the task assignments and a validation report is displayed if there are any conflicts.

Data transferred from ChangePoint when updating a linked MSP project

Each time you access a linked MSP project, you can select whether you want to update the following information from ChangePoint:

- Actual hours spent on tasks
- Actual time by assignment, by date
- Actual start dates for assignments
- Task status (forecast to complete in hours)
- Estimated completion date of tasks (if not finished)
- Forecast start date of task assignments

ChangePoint allows the status update requirement for projects to be overridden for specific tasks and task assignments, but this capability is not supported in Microsoft Project. If you

create a task or task assignment in Microsoft Project and then transfer the task to ChangePoint, applies the project status requirement to the task or task assignment.

Data transferred between ChangePoint and MSP

You can enter the following task-related information in either ChangePoint or Microsoft Project:

- Specification of whether a task is billable
- Text fields 1, 2, 3
- Code fields 1, 2, 3 (single values only)
- Utilization eligible
- Update resource calendar
- Associate with fixed fee
- Fixed-fee item

Steps required before linking a project

The following list describes the steps required before a ChangePoint project can be linked with Microsoft Project.

1. Creating a project in ChangePoint, with or without tasks and task assignments. For more information, see "About creating projects" on page 14.
2. Creating a list of resources for the project in ChangePoint. For more information, see "About creating a list of resources for a linked MSP project" on page 149.
3. Setting up exchange rates in ChangePoint Administration.

   If different currencies are used in ChangePoint and Microsoft Project, ensure that the appropriate exchange rate values have been set up and activated in ChangePoint Administration. Otherwise, an exchange rate value of 1 will be used during data transfers.
4. Installing the ChangePoint MSP COM Add-in. For more information, see "Installing the ChangePoint MSP COM Add-in" on page 150.

About creating a list of resources for a linked MSP project

Before you link your ChangePoint project to Microsoft Project, you must ensure that all of the resources that you intend to assign to project tasks are specified in ChangePoint. The type of

resource list depends on how resource requests are used by your organization:

- If resource requests are not used, the resources from your **Preferred resources** list are used.
- If resource requests are submitted from the contract or task editing view, then the projected resources from the contract are used. If task restrictions have been set up for the contract to restrict assignments to projected resources, then these task restrictions are also applied in Microsoft Project.
- If resource requests are submitted from the project, then the resources from the project team are used.

Installing the ChangePoint MSP COM Add-in

1. In ChangePoint, click **Preferences**.

   The **Preferences** view appears.

2. Expand the **Add-in installations** section, and click the **Install ChangePoint MSP COM Add-in** link.

   A file download dialog box for **ChangePoint MSP COM Add-in** installer appears.

3. Click **Run** to launch the installer.

   Depending on your browser, you may have to save the installer first and then run it.

4. If a security warning displays, acknowledge the warning and continue with the installation.
5. Follow the installer prompts:
   - When you are prompted to select a language, select your Windows operating system language.
   - When you are prompted for the URL of the ChangePoint website, copy and paste the URL from the **MSP** subsection of the **Add-in installations** section of the **Preferences** view.
6. When the installation complete message displays, click **Finish**.

   The following ChangePoint-related items are added to the Microsoft Project interface:

   - **ChangePoint** command on the **Add-Ins** tab.
   - **CP Gantt** view, accessible from the **Gantt Chart** command on the **View** tab.

- ChangePoint fields for selection, accessible from the **Insert Columns** command on the **Gantt Chart Tools Format** tab.

Default schedule settings for Microsoft Project

It is recommended that you set the following schedule settings as default settings in Microsoft Project, before linking to ChangePoint. The options are in the **Schedule** tab of the **Options** dialog box in Microsoft Project. For more information, refer to the Microsoft Project help.

MSP Schedule option	Recommended setting
New tasks created	Auto Scheduled
Show assignment units as a	Percentage
Auto-scheduled tasks scheduled on	Project Start Date
Duration is entered in	Days
Work is entered in	Hours
Default task type	Fixed Duration (All tasks in ChangePoint are defined as fixed duration.)
Show that scheduled tasks have estimated durations	Clear the check box

Configuring the ChangePoint website settings

If you access different ChangePoint websites, for example, an internal website at the office and an Internet website from home, then you must switch the ChangePoint website settings in Microsoft Project.

Tip: When you open a linked MSP project, the ChangePoint URL displays in the bottom left corner of the Microsoft Project window.

1. In Microsoft Project, click the **Add-ins** tab.
1. Click**ChangePoint** > **ChangePoint Setup**.

   The **ChangePoint Setup** dialog box appears.
2. Enter the URL or website address for ChangePoint.

3. Click **OK**.

   Your ChangePoint website settings are validated and saved. These settings are used the next time you link to ChangePoint.

Accessing a linked MSP project

After a project is linked, you can view and edit it using Microsoft Project.

1. In Microsoft Project, click the **Add-ins** tab.
2. Click **ChangePoint** > **Link ChangePoint Project**.
3. If the ChangePoint sign in dialog box displays, enter your ChangePoint user ID and password and click **OK**.

   The **ChangePoint Project List** dialog box appears.
4. Expand the **Linked Projects** folder and select a project.
5. Click **OK**.

   The **Link ChangePoint Project** dialog box appears.
6. Do one of the following:
   - To access the linked project without transferring data from ChangePoint, select the **Do not update the data in Microsoft Project** option and then click **OK**.
   - To update the linked project before accessing it, select the relevant update option and then click **OK**. For more information, see "Link ChangePoint Project dialog box options" on page 153.

   The linked project opens in Microsoft Project.

About linking ChangePoint projects to Microsoft Project

If you do not select additional update options when first linking a project, the start date, finish date and hours for tasks and task assignments in Microsoft Project will be preserved. If you select additional update options (such as, **Update the actual start date** or **Update actual hours**), it could cause Microsoft Project to recalculate the start date, finish date and effort, which means that these values will be different than what was originally in ChangePoint will not interfere with the Microsoft Project calculations.

Note: Open tasks are not supported in linked MSP projects because entering time for open tasks creates an assignment in ChangePoint, which is not allowed in linked MSP projects. Therefore, you cannot link a ChangePoint project that includes open tasks.

If you link an MSP project that already contains actual work, costs, start dates or finish dates, this information is not transferred into ChangePoint. Instead, the actual values are overwritten with values from ChangePoint when you link and update the project. However, you can choose not to link certain tasks from the MSP project and the actual values for these tasks will not be overwritten.

After an MSP project is linked to a ChangePoint project:

- You must enter all planning and resource assignment changes in the linked MSP project.
- The project manager, project plan editor, or summary task manager for the task can do limited editing on tasks in ChangePoint, but cannot add tasks or modify them using Project Worksheet. However, you can make changes to the project that are not related to tasks. For example, you can still change access rights in ChangePoint.
- You cannot create open tasks for linked MSP projects.
- You cannot save baselines for linked MSP projects.

Link ChangePoint Project dialog box options

In the **Link ChangePoint Project** dialog box, you specify the options for transferring data from ChangePoint to the MSP project.

Option	Description
Do not update the data in Microsoft Project	When selected, data is not transferred from ChangePoint to the MSP project. Not available the first time the project is linked.
Update the modified tasks in Microsoft Project	When selected, transfers data only from tasks for which resources have entered time or status updates. Not available the first time the project is linked.

Option	Description
Update all tasks in Microsoft Project	When selected, transfers all of the data. Use this option to transfer all of the data from ChangePoint if the linked project gets out of sync, for example, if an update is interrupted or there is a system crash. Not available the first time the project is linked.
Update the rates for Microsoft Project	When selected, transfers the cost rates for resources.
Update project and resource-level nonworking days and calculate resource maximum units	When selected, transfers the nonworking days from the project and resource-level to MSP. Also, calculates the maximum units for resources based on the percent available for planned work from the ChangePoint workgroup and the default hours per day from MSP.
Update the actual start date	When selected, transfers the actual start dates of task assignments.
Update actual hours	When selected, transfers actual hours that resources entered against tasks.
Update remaining hours	When selected, transfers the remaining hours for tasks.
Update planned effort distributions	When selected, transfers allocated planned hours from the project to the MSP project *the first time that the project is linked only*. After the project is linked, time allocation data is transferred only from Microsoft Project to ChangePoint. This option is set automatically and cannot be changed if a billing office has been associated with the ChangePoint project.
Only update tasks with a planned start date within the following date range	When selected, transfers the actual hours and dates for the tasks that have a planned start date that is within the date range that you specify. Not available the first time a project is linked.

Option	Description
Update the summary time in Microsoft Project	When selected, transfers time at the task assignment level, and only the **Actual Work** column is updated in Microsoft Project. For example, if time records for a task include 6 hours on Monday and 8 hours on Tuesday, the **Actual Work** column in Microsoft Project displays a total of 14 hours. However, Microsoft Project distributes the actual time based on the planned hours for each day. If 8 hours were planned for Monday and 8 hours for Tuesday, the actual time would be distributed as 8 hours on Monday and 6 hours on Tuesday in Microsoft Project. Available only when **Update actual hours** is enabled and a billing office has been associated with the ChangePoint project.
Update the detailed time in Microsoft Project	When selected, transfers actual data at a detailed level, including a breakdown of task time by day. For example, if time records for a task include 6 hours on Monday and 8 hours on Tuesday, the actual time would be distributed in Microsoft Project as 6 hours on Monday and 8 hours on Tuesday. Available only when **Update actual hours** is enabled and a billing office has been associated with the ChangePoint project.

Linking a ChangePoint project to Microsoft Project

1. In Microsoft Project, click the **Add-Ins** tab.
2. Click **ChangePoint** > **Link ChangePoint Project**.
3. If the **ChangePoint sign-in** dialog box displays, enter your ChangePoint user ID and password and then click **OK**.

   The **ChangePoint Project List** dialog box appears. The **Available projects** folder lists projects for which you are a project manager. The **Linked projects** folder lists your projects that are already linked with Microsoft Project.
4. Expand the **Available projects** folder, select the project, and then click **OK**.

The **Link ChangePoint Project** dialog box appears.

5. Do one of the following:
   - To create the link to Microsoft Project without transferring actual data, or if no data exists yet, do not select any options. You can always update the actual data at a later time.
   - To transfer data from the ChangePoint project, select the relevant options. For more information, see "Link ChangePoint Project dialog box options" on page 153.
6. Click **OK**.

   The new MSP project is created and linked to the ChangePoint project.

About editing a linked MSP project

After a ChangePoint project is linked to an MSP project, you must edit and create all tasks and task assignments in the MSP project. You can also enter additional project information and monitor project progress.

Note the following differences in behavior for working with linked MSP projects:

- When projects and tasks are linked through interproject dependencies, you cannot move the start date of the successor task to an earlier date than the latest finish date for the parent task plus lag time for all parent tasks.
- When adding a new task, you must enter values for fields that are mandatory in ChangePoint.
- If you change the billing role for a task assignment, it is saved in ChangePoint with the current date as the effective date. If you want to specify a different effective date, you must perform the change in ChangePoint, which requires breaking the link to Microsoft Project.
- When using the **Insert project** option to import an existing MSP project, you must clear the **Link to project** check box. Otherwise, data will not be updated from Microsoft Project to ChangePoint . Also, keep in mind that actual times and dates in this plan will be overwritten with actual data from ChangePoint when the link is updated.
- When you create a task assignment in a linked MSP project, the effort amounts are converted to hours, days, or FTEs based on the system-level **Daily capacity** setting and

not the **Daily conversion factor** that is normally used when task assignments are created in ChangePoint.

Editing a linked MSP project

1. Access the linked project in Microsoft Project.
2. Make the necessary changes.
3. To update a task in the ChangePoint project, select **Yes** in the **Update CP** column.
4. Click the **Save** icon.
5. Exit from Microsoft Project.
6. If a message appears, asking if you want to save the project, click **Yes**.
7. In ChangePoint, roll up the project to update the planned hours, planned start and planned finish dates. For more information, see "Rolling up a project manually" on page 49.

Deleting a task or task assignment from a linked MSP project

You cannot delete a task or task assignment that has actual time or expenses entered against it. When you delete a task from a linked MSP project, the task is removed from ChangePoint, but remains in Microsoft Project. If the task is an integral part of the **Projects** tree view, it remains in ChangePoint but is inactive.

1. Access the linked project in Microsoft Project.
2. To delete a task in the ChangePoint project only, select **Yes** in the **Remove CP** column.
3. Click the **Save** icon.
4. Exit from Microsoft Project.
5. If a message appears, asking if you want to save the project, click **Yes**.

Updating actual time and dates in a linked MSP project

Resources enter the time that they spend working on tasks into ChangePoint, but this data is not transferred to the linked MSP project until you update it.

1. Access the linked MSP project.

   The **Link ChangePoint Project** dialog box appears.

2. Select the **Update the modified tasks in Microsoft Project** check box.

3. Select the type of information you want to transfer to the MSP project. For more information, see "Link ChangePoint Project dialog box options" on page 153.

4. Click **OK**.

   The data is transferred to the MSP project, which opens.

About identifying ChangePoint resources in a linked MSP project

In linked MSP projects, there is a custom **ChangePoint resource** flag that you can use to identify ChangePoint resources. You can either insert the flag as a column into a resource sheet, or insert a column in your linked MSP project. For more information, see the Microsoft Project help.

About forecast start and finish dates in linked MSP projects

Only planned start and finish dates are updated from Microsoft Project to ChangePoint, but not forecast start and finish dates. In both ChangePoint and Microsoft Project, the forecast start and finish dates are the same as the planned start and finish dates until the first time that a resource updates the status of a task. After a resource updates the status of a task, the forecast start and finish dates are stored in separate fields in ChangePoint and transferred to Microsoft Project into the Start10/Finish10 fields for information purposes. Changes to the planned start and finish dates, whether done in Microsoft Project or ChangePoint, no longer affect the forecast start and finish dates.

Forecast dates in ChangePoint may be different than the start and end dates in Microsoft Project. Forecast start and finish dates in ChangePoint are updated when resources update the task status. Start and end dates in Microsoft Project are updated when the project manager changes planning information and by Microsoft Project calculations.

Viewing task usage information in a linked MSP project

Use the **Task Usage** view in Microsoft Project to view the distributed time information as it has been entered in ChangePoint. Actual time is exported from ChangePoint to Microsoft Project by assignment date.

1. Access the linked MSP project.

2. Click the **View** tab.

3. Click **Task Usage** > **Task Usage**.

About removing the MSP link

If you want to manage a linked MSP project in ChangePoint without interfacing with Microsoft Project, you can remove the MSP link. When the MSP link is removed:

- All dependencies between ChangePoint and Microsoft Project are removed. Reconnecting the MSP link after will not re-establish the dependencies.
- A snapshot of the MSP project is saved as an .mpp file attachment in the **Related knowledge** section of the project profile. The .mpp file is for information purposes only.

Removing the MSP link

You must use Microsoft Project to remove the link.

1. In Microsoft Project, click the **Add-Ins** tab.
2. Click **ChangePoint** > **Remove ChangePoint project link**.
3. If the **ChangePoint sign-in** dialog box displays, enter your ChangePoint user ID and password and then click **OK**.

   The **ChangePoint Project List** dialog box appears.
4. Expand the **Linked projects** folder and select the project that you want to unlink.
5. Click **OK**.

   A confirmation dialog box appears.
6. Click **Yes**.

   The link is removed.

Microsoft Project and ChangePoint field mappings

The following tables detail how the project, task and task assignment fields in ChangePoint are mapped to the corresponding fields in Microsoft Project, and how and when the fields are updated automatically.

Note: The ChangePoint **Alternate Name** field is not supported in Microsoft Project.

Restrictions with configurable fields in linked MSP projects

The ChangePoint configurable fields **Text 1**, **Text 2**, and **Text 3** for projects are mapped to the **Text 1**, **Text 2**, and **Text 3** fields in Microsoft Project, which are text only. To ensure that

these fields in linked MSP projects are updated properly, the field type of the ChangePoint configurable fields must be text. Do not change the field type to numeric or date.

Project field mappings

ChangePoint field	Direction	During creation and/or update	MSP column
Project name	To	Creation	Project Name
Billable	To	Creation and Update	Billable
First status	To	Creation	Status date
Currency	To	Creation and Update	Currency
Project start (calculated)	To	Creation	Project Start
Billing type	To and From	Creation and Update	Text 2

Task field mappings

ChangePoint Field	Direction of Feed	During Creation and/or Update	Microsoft Project Column
Task name	To, during creation only. From, during updates		Name
Description	To and From	Creation and Update	Task Notes
Baseline start	From	Creation	Baseline Start
Baseline finish	To during creation only. From during updates		Baseline Finish
Baseline hours	To during creation only. From during updates		Baseline Work
Forecast start	To and From	Creation and Update	Start 10

ChangePoint Field	Direction of Feed	During Creation and/or Update	Microsoft Project Column
Forecast finish	To and From	Creation and Update	Finish 10
WBS	To	Creation	Outline Level
WBS	From	Update	Outline Number
Billable task	To and From	Creation and Update	Billable
Text 1	To and From	Creation and Update	Text 1
Text 2	To and From	Creation and Update	Text 2
Text 3	To and From	Creation and Update	Text 3
Billed to fixed-fee portion of the contract	To and From	Creation and Update	Fixed Fee (Flag 5)
Fixed fee (deliverable name)	To and From	Creation and Update	Fixed Fee Item (Text 4)
Utilization eligible	To and From	Creation and Update	Utilization Eligible (Flag 6)
Capital	To and From	Creation and Update	Capital (Flag 10)
Project phase	To during creation only. From during updates		Phase (Text 12)
Configurable code 1	To and From	Creation and Update	Text 6
Configurable code 2	To and From	Creation and Update	Text 7
Configurable code 3	To and From	Creation and Update	Text 8
Add to calendar	To and From	Creation and Update	Calendar CP (Flag 4)
Locked task	To and From	Creation and Update	Locked (Flag 7)

ChangePoint Field	Direction of Feed	During Creation and/or Update	Microsoft Project Column
Open task	To	Creation and Update	Not editable in Microsoft Project
Work code	To and From	Creation and Update	Work Code (Text 9)
Location	To and From	Creation and Update	Location (Text 10)
Task status (completed only)	To and From	Creation and Update	Percent Complete
Planned hours (computed value)	To and From	Creation	Duration
Billing role	To and From	Creation and Update	Text 5
Function	To and From	Creation and Update	Text 11
Capital	To and From	Creation and Update	Capital (Flag 10)
Allow work code override	To and From	Creation and Update	(Flag 9)
Allow work location override	To and From	Creation and Update	(Flag 8)
Planned start	To during creation only. From during updates		Start
Actual start	To during creation, if the option to update the actual start date is selected. Thereafter, from during updates.		Actual Start
Actual finish	From	Update	Actual Finish
Planned finish	To during creation only. From during updates		Finish
Milestone	To and From	Creation and Update	Milestone

Task assignment field mappings

ChangePoint Field	Direction of Feed	During Creation and/or Update	Microsoft Project Column
Planned hours	To during creation only. From during updates		Work
Not stored in ChangePoint	To and From	Creation and Update	Units MSP calculates units based on work/duration, which is updated from ChangePoint.
Actual hours	To during creation only.		Actual Work (summary) Time Scale Actual Work (detailed)
Forecast start Forecast finish When the task assignment is not completed, these are set to planned start and planned finish. When resource completes the task and agrees to update the planned hours, then they are set to planned start and planned finish.	To and From	Creation and Update	Start (Start 10)
	To and From	Creation and Update	Finish (Finish 10)
Actual start	To	Creation and Update	Actual Start

ChangePoint Field	Direction of Feed	During Creation and/or Update	Microsoft Project Column
Actual finish	To	Creation and Update	Actual Finish (ChangePoint updates the actual start and MSP calculates the actual finish)
Manager comments Notes entered in MSP will be updated in **Manager comments** only.	To and From	Creation and Update	Notes Both manager comments and resource comments are updated in **Notes**.
Resource comments	To	Creation and Update	Notes
Planned start	From	Creation	Start
Planned finish	From	Creation	Finish

ChangePoint Field	Direction of Feed	During Creation and/or Update	Microsoft Project Column
Cost to date (task assignment – This figure is the total hours times the resource's hourly cost rate)	To	Creation and Update	Actual Cost (This value is calculated based on time entries and the effective dates on cost rates for each task assignment through a scheduled job run in ChangePoint. The values calculated are added to the field in Microsoft Project.)
Remaining hours Remaining hours are sent to ChangePoint only when the resource completes the task and selects to update the planned hours for the completed task. Then remaining hours is set to 0 (zero).	To and From	Creation and Update	Remaining Work
Text 1	To and From	Creation and Update	Text 1
Text 2	To and From	Creation and Update	Text 2
Text 3	To and From	Creation and Update	Text 3

ChangePoint Field	Direction of Feed	During Creation and/or Update	Microsoft Project Column
Billing role description	To and From	Creation and Update	Billing role (Text 5)
Locked	To and From	Creation and Update	Locked (Flag 7)
Location	To and From	Creation and Update	Location (Text 10)
Functions	To and From	Creation and Update	Functions (Text 11)
Allow work code override	To and From	Creation	Location Override (Flag 8)
Allow work location override	To and From	Creation	Work Code Override (Flag 9)
Code 1	To and From	Creation and Update	Text 6
Code 2	To and From	Creation and Update	Text 7
Code 3	To and From	Creation and Update	Text 8
Work code	To and From	Creation and Update	Work Code (Text 9)

Resource Field Mappings

ChangePoint Field	Direction of Feed	During Creation and/or Update	Microsoft Project Column
Indicate CP resource	To	Creation	Flag 1 (Read-only in MSP)
Resource name	To	Creation and Update	Resource
Hourly cost rate	To	Creation and Update	Standard Rate
Effective date	To	Creation and Update	Effective Date

Nonworking days settings

ChangePoint Setting Level	Microsoft Project Setting
System level	Project Calendar
Global Workgroup	Personal Calendar
Workgroup	
Resource	

About editing tasks and task assignments in linked MSP projects

You can select the values for the following fields at the task level and at the task assignment level:

- **Work**
- **Duration**
- **Start**
- **Finish**
- **Code 1,2,3** (if used)
- **Text 1,2,3** (if used)
- **Forecast start**
- **Forecast finish**
- **Billable**
- **Billing role**
- **Function**
- **Work code**
- **Work location**
- **Work location override**
- **Work code override**

- **Locked**

  Tip: If the columns for the fields are not displayed, you can insert them.

When creating a task in Microsoft Project, you can select the values for these fields in the task view. Task assignments that you create for tasks automatically have the same field values as the task and are transferred to ChangePoint when you save the linked project. However, you can edit these values for tasks and specific task assignments.

Editing a task in a linked MSP project

1. Access the linked MSP project.
2. Click the **View** tab.
3. Click **Gantt Chart** > **CP Gantt**.
4. Click **Table** > **CPUsage**.
5. Make the necessary changes.
6. If there are existing task assignments, a message displays, asking if you want to override this value for all assignments. Do one of the following:
   - To replace the values for all existing task assignments with the new value, select **Yes**.
   - To leave the values for existing task assignments unchanged, select **No**.
7. Save the project.

   Note: Changes to the **Billing role** field are handled in a different way. Existing task assignments that were previously saved with or without a billing role will not be updated. You must edit the task assignments accordingly. For more information, see "Editing a task assignment in a linked MSP project" on page 168.

Editing a task assignment in a linked MSP project

1. Access the linked MSP project.
2. Click the **View** tab.
3. Click **Task Usage** > **Task Usage**.
4. Click **Table** > **CPUsage**.
5. Make the necessary changes.

6. Save the project.

About setting baselines in linked MSP projects

In Microsoft Project, you can set up to 11 baselines. However, only the information from the first baseline option in the list (**Baseline**, without a number), is transferred to ChangePoint. You can set this baseline multiple times; however, each time you set the baseline, the new baseline information replaces the previous baseline information in ChangePoint.

> **Note:** Changes that you make to project and task assignment baselines in Microsoft Project are not transferred to ChangePoint.

For information about setting a baseline, see the Microsoft Project help.

About saving interim plans in linked MSP projects

The use of interim plans is solely for the purpose of project tracking in Microsoft Project. The interim plan fields have no effect on the ChangePoint project dates. That is, this information is not transferred back to ChangePoint.

To view an interim plan after it has been saved, insert the interim baseline field columns into the table. For example, if you selected the **Start1** and **Finish1** fields when saving the interim plan, then you would add these fields to the table.

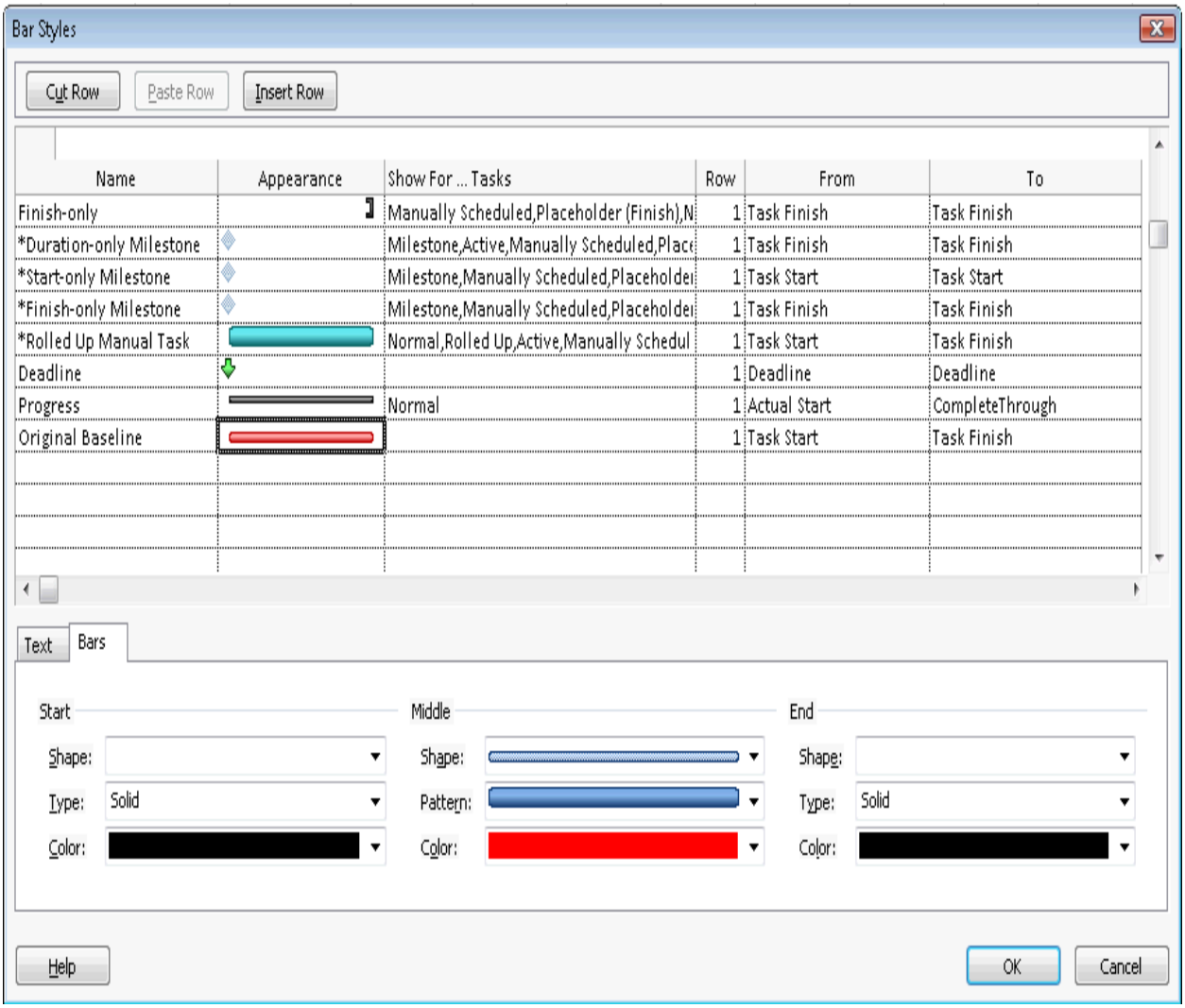
For information about saving an interim plan, see the Microsoft Project help.

Setting up multiple baselines in a linked MSP project

To display both the active and original baselines in Microsoft projects, each Microsoft Project user must configure a specific bar style for each of the baselines in their local Microsoft Project settings. You only have to perform this procedure once for each installation of Microsoft Project.

> **Note:** It may be possible to have one user perform this procedure and then email the Global.mpt file to the other ChangePoint users at the organization. For more information, see the Microsoft Project online help.

1. In Microsoft Project, click **Format > Bar Styles**.
2. The **Bar Styles** dialog box appears.
3. Insert a new row and different color bar for each for the active and original baselines. For more information about configuring bar styles, see the Microsoft Project online help.



4. Click **OK** to close the dialog box.
5. Click the **View** tab.
6. Select **Additional View** > **More Views**.

   The **More Views** dialog box appears.
7. Click the **Organizer** button.

   The **Organizer** dialog box appears.
8. Select **CP Gantt** in the list to the right that displays the name of the current project.
9. Click the **Copy** button.

The CP Gantt entry is copied to the Global.mpt list (added to the Global.mpt template file).

10. When prompted to replace the existing file, click **Yes**.
11. Click **Close** to close the **Organizer** dialog box.
12. Click **Close** to close the **More Views** dialog box.

After you save the settings, the two new baseline fields are displayed in Microsoft Project for all projects in the CP Gantt chart view, and you can do the following with or without ChangePoint:

- Show the **Baseline** and **Interim Baseline** on the **CP Gantt** view.
- Export the **Interim** baseline to the **Start1** and **Finish1** fields.

9. Project Management Troubleshooting

Scenarios for saving baselines

This topic provides project scenarios with different combinations of settings for rolling up subtasks and saving task baselines, and details the expected results of saving baselines on the different levels of projects and tasks within those scenarios.

The scenarios are based on the following project structure:

Project level 1	Project level 2	Project level 3	Project level 4
Project 1			
	– Task 1		
		– Project 1.1	
			Task 1.1.1
			Task 1.1.2
	Task 2		

Scenario 1

The following conditions exist:

- Project 1 is not configured to roll up planned information from subprojects to parent task
- Resources do not have the option to save task baselines without affecting upper-level tasks, OR
- Resources have the option to save task baselines without affecting upper-level tasks, but when saving a task baseline, the resource selects the option to roll up and baseline

Project or task	Rollup	Baseline
Project 1	Roll up Task 1 and Task 2 to Project 1	Task 1, Task 2, Project 1 No baseline in Project 1.1
Task 1*	Roll up to Project 1	Task 1, Project 1
Project 1.1*	No roll up to the parent task	Task 1.1.1, Task 1.1.2, Project 1.1
Task 1.1.1*	Roll up to Project 1.1	Task 1.1.1, Project 1.1
Task 1.1.2*	Roll up to Project 1.1	Task 1.1.2, Project 1.1
Task 2*	Roll up to Project 1	Task 2, Project 1

* When saving a task baseline, the system uses the previous (most recent) baseline values for the other project tasks when they are required to calculate summary task and project baselines.

Scenario 2

The following conditions exist:

- Project 1 is not configured to roll up planned information from subprojects to parent task
- Resources have the option to save task baselines without affecting upper-level tasks option
- When saving a task baseline, the resource selects the option to baseline the task and lower tasks only

Project or task	Rollup	Baseline
Project 1	Roll up Task 1 and Task 2 to Project 1	Task 1, Task 2, Project 1 No baseline in Project 1.1
Task 1	No roll up to the Project 1	Task 1
Project 1.1	Roll up Task 1.1.1 and 1.1.2 to Project 1.1. No rollup to the Task 1	Project 1.1, Task 1.1.1, Task 1.1.2 (Project 1 baseline rules apply)

Project or task	Rollup	Baseline
Task 1.1.1	No roll up to the Task 1	Task 1.1.1
Task 1.1.2	No roll up to the Task 1	Task 1.1.2
Task 2	No roll up to the Project 1	Task 2

Scenario 3

The following conditions exist:

- Project 1 is configured to roll up planned information from subprojects to parent task
- Resources do not have the option to save task baselines without affecting upper-level tasks, OR
- Resources have the option to save task baselines without affecting upper-level tasks, but when saving a task baseline, the resource selects the option to rollup and baseline

Project or task	Rollup	Baseline
Project 1	Project 1	All projects and tasks
Task 1*	Roll up to Project 1	Task 1, Project 1 Project 1.1, Task 1.1.1, Task 1.1.2
Project 1.1*	Roll up to Task 1, Project 1	Project 1.1, Task 1.1.1, Task 1.1.2 Task 1, Project 1, Task 2 (old baseline value)
Task 1.1.1*	Roll up to Project 1.1, Task 1, Project 1	Task 1.1.1, Project 1.1, Task 1, Project 1
Task 1.1.2*	Roll up to Project 1.1, Task 1, Project 1	Task 1.1.2, Project 1.1, Task 1, Project 1
Task 2*	Roll up to Project 1	Task 2, Project 1

* When saving a task baseline, the system uses the previous (most recent) baseline values for the other project tasks when they are required to calculate summary task and project baselines.

Scenario 4

The following conditions exist:

- Project 1 is configured to roll up planned information from subprojects to parent task
- Resources have the option to save task baselines without affecting upper-level tasks
- When saving a task baseline, the resource selects the option to baseline the task and lower tasks only

Project or task	Rollup	Baseline
Project 1	Project 1	All projects and tasks
Task 1	Roll up to Task 1 No rollup to Project 1	Task 1 Project 1.1, Task 1.1.1, Task 1.1.2
Project 1.1 * †	Rollup to Task 1, Project 1	Project 1.1, Task 1.1.1, Task 1.1.2 Task 1, Project 1, Task 2 (old baseline value)
Task 1.1.1 * †	Rollup to Project 1.1, Task 1	Task 1.1.1, Project 1.1, Task 1
Task 1.1.2 * †	Rollup to Project 1.1, Task 1	Task 1.1.2, Project 1.1, Task 1
Task 2	No Rollup to Project 1	Task 2

* When saving a task baseline, the system uses the previous (most recent) baseline values for the other project tasks when they are required to calculate summary task and project baselines.

† Baselines are saved for higher level tasks because the rolling up of planned information from subprojects to parent task takes precedence even when the resource saves a task baseline and selects the option to baseline the task and lower tasks only.

Troubleshooting projects

This topic provides troubleshooting information for the project profile and project dialog box.

Billable project check box is not available

The **Billable project** check box is available only if the option to allow project managers to override the **Billable** status check box has been selected in the contract dialog box. For the project to display as a selection in the invoice dialog box, the project must be billable.

Cannot change the Billable status of a project

You cannot change the setting of the **Billable project** check box when the **Split billing** check box has been selected on the **Billing information** tab of the contract and either of the following conditions exist:

- Invoices exist for a contract or phantom contract that is in **Draft**, **Pending Approval**, **Pending Second Approval** or **Approved** status.
- All invoices are committed, but there is time and/or expenses for the contract or phantom contract that have not been fully invoiced.

Project ID field is not available

The field has not been enabled by your organization.

Fiscal Periods field: billing office is not available

The **Fiscal periods** field lists only billing office that have defined fiscal periods.

Billing Contact field is not available

This field is available only if the option to allow project managers to specify the billing contact check box has been selected for the contract. The address type (main, billing, shipping or another as configured by your System Administrator) for the contact is selected at the contract level.

CP Project Type field is not available

The **CP project type** field has not been enabled by your organization.

Alternate Name field is not available

The field has not been enabled by your organization.

Request field is not available

The project did not originate from a request.

Enable project time approval check box is not available

This field is available only if the option to allow project managers to specify the time approver field has been enabled for the contract associated with this project.

Project Plan editor cannot take ownership of a project
Project plan editor cannot create or delete tasks
Resource does not appear in project plan editor list

These issues are most likely related to access rights. See "Managing projects" in the *Security Access Reference Guide*.

“Baseline only” option selected when saving a baseline, but parent task is being rolled up and baselined

If the option to roll up planned information from subprojects to parent task is selected on the **Access** tab of the parent project, it takes precedence over the option to save a baseline without affecting higher level tasks.

Project Team section does not appear

In order for the **Project Team** section to appear, *both* of the following conditions must exist:

- resource requests must be enabled on the billing office
- resource requests must be enabled at the project level on the **Projected Resources** dialog box of the contract

Fiscal Year Breakdown section does not appear

The section displays only if fiscal periods have been specified for the billing office that is associated with the project.

Allow users to override the [Billable] status on expenses entered for this project check box is not available in the Access section of the project dialog box

This option is available only if the contract and project are billable, and the option for the project manager to override this status has been enabled on the contract.

Troubleshooting linked MSP projects

Project is not available for linking from Microsoft Project

If your organization uses resource requests, all mandatory configurable fields on resource requests must be completed on the project editing and task editing views before the project

will be available for linking from Microsoft Project.

Troubleshooting tasks

This topic provides troubleshooting information for the task profile and task editing view.

A resource is not available to be assigned to a task

Resources require the **Track Project-Related Time** feature to be assigned to a task.

Open task field not available

If resource requests have been enabled for projects or tasks on the contract, then the **Open task** check box is disabled on the task editing view.

Billed to fixed-fee portion of the contract field is not available

This option is available only if the contract uses fixed-fee billing

Fixed Fee field is not available

This field is available only if the contract is billed under some variation of a fixed-fee method.

Billing rate field is not available

This field is available only if you have the **View Billing and Cost Rates in Task Assignment Section** feature. Also, the first time that you access a task in the system, you must right-click on the grid and select **Show billing rates** to view this field.

Cost rate field (Billing role cost rate or Resource-based cost rate) is not available

The **Cost rate** field is a non-editable field that displays the billing role-based or resource-based cost rate that is applicable to the task assignment. It is only available to resources who have the **View Billing and Cost Rates in Task Assignment Section** feature.

The cost rate that is displayed is determined by the settings for the billing office in ChangePoint Administration:

- If the billing office for the task is configured to use billing role cost rates, then this field is called **Billing role cost rate**.
- If the billing office is configured to use resource cost rates, then the field is called **Resource-based cost rate** and you additionally require the **View Costs** feature for it to display.

The first time that you access a task in the system, you must right-click on the table and select **Show cost rates** to view this field.

Soft-booked field is not available

This field is available only if soft-booking has been enabled for the billing office.

Status update section is not available

The **Status update** section appears only on tasks that are assigned to you.

Troubleshooting Project Worksheet

Time-based assignment appears on different dates in Service Scheduler and Project Worksheet

If the time zone for the resource is changed after the time-based task is assigned to the resource, the task assignment is displayed according to the new time zone in Service Scheduler, but according to the original time zone in Project Worksheet. This limitation applies only to task assignments that exist at the time that the time zone is changed.

Dependency link does not appear in Gantt chart

Check if the predecessor task has been hidden by a filter, which will result in the dependency link not appearing in the Gantt chart.

Actual effort in past periods is evenly distributed after changing the loading method

If you change the loading method from one that does not replace planned effort in past periods with actual effort (3,4) to one that does (0,1,2), the actual effort in the past periods is distributed evenly and not according to the dates and amounts when the actual effort was originally entered.

To see the exact distribution of actual hours in the past, you must save the project and then refresh Project Worksheet. Saving the project saves the daily distribution of the assignment (including the actual effort in past periods) and initiates a project rollup.

Task field values not inherited when assigning tasks in task view
Field values not copied when copying tasks or replacing assigned resources

Configurable field values (and a few standard fields) are not inherited when assigning tasks in a task view unless the fields on the task and task assignment have been displayed in Project Worksheet.

Similarly, field values are not copied when copying or reassigning tasks unless the fields on the task and task assignment have been displayed in Project Worksheet.

To ensure that field values are inherited or copied, do the following:

1. Create a task view that contains the desired fields.
2. Create a task assignment view that contains the desired fields. Make the task assignment view your default view so that it appears each time you access Project Worksheet.
3. Switch to the task view to add or change data.

You cannot insert a task or make any modifications in Project Worksheet and the "Save" and "Apply" buttons are missing.

Check that you have locks on the tasks that you want to work with. If they are locked by other resources, you must wait until the tasks have been unlocked before you can lock them. Note that the project manager can take locks from other resources, which can cause the other resources to lose their changes. To view who has the locks, point to the lock icon in the Project Worksheet view.

Summary task managers can see only their summary tasks in Project Worksheet

To view all of the tasks in Project Worksheet, summary task managers must be granted view project access to the project by the project manager.

Rolled up amounts for the project are incorrect in Project Worksheet

Only the tasks that are currently displayed in the worksheet are rolled up after changes have been made.

Therefore the rolled up amounts can be lower than the project totals for the following reasons:

- filter has been applied to limit the tasks that are displayed
- you are a summary task manager and do not have view project access to the project

Cannot edit planned start, planned finish, and planned hours in a task view

If one or more task assignments for a task has a manual loading method, then you cannot edit the planned start, planned finish, or planned hours for the task in a task view.

Planned effort totals for daily distribution amounts are incorrect in Project Worksheet

Daily distribution amounts are calculated and stored using five decimal places, but are rounded to three decimal places when displayed in Project Worksheet. Therefore due to rounding, the daily distribution amounts for a task assignment might add up to a slightly different amount than the total planned effort that is displayed for a task assignment.

"Select/Deselect tasks for activation" icon does not appear in Project Worksheet

The **Select/Deselect tasks for activation** icon is available in a task view only when no sort criteria has been specified in the view and no filter has been applied.

Cannot add effort to a resource in the "Assign/Replace Resources" dialog box

When the default loading method is manual, you must use a task assignment view to allocate effort to daily or fiscal periods.

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