#### Georgia Tech

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# Create a WBS Using the Planning Console

Quick Reference Guide

### **Accessing the WBS**

The **work breakdown structure (WBS**) is a hierarchical representation of all the tasks in your project. Use the WBS to get a quick overview of the entire project, including the tasks and subtasks nested in the project. The Gantt chart gives you a similar overview using graphical elements such as lines and bars to show dependencies and lengths of tasks. You can view the project WBS on the Planning Console.

#### Access the **Planning Console** by:

- 1. Clicking the **Planning Console** related link from the main page of the project.
- 2. Going to the **Project Workspace**, clicking into a project, then clicking the **Planning** tab





### **Time Constraints**

- Defining a time constraint on a task determines the start date of that task. If a task is set to Start ASAP, the task starts at the same time as the parent task or project start date. The task appears on the Gantt chart as starting when the dependency allows it. However, a task can start on a later date when a lag value is set for the relationship.
- If a task is set to **Start on Specific Date**, the task appears on the Gantt chart as starting on the specified date.

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* Short description					
Initiate Project				V E	
Number		State			
PRJTASK0017697		Pending	v		
Time constraint		Percent complete			
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Start ASAP					
Start on specific date					



#### **Editing Tasks in the Console**

- In the Planning Console, right click on tasks to access a short cut menu of options. You can edit, delete or add task dependencies.
- When choosing Edit, the task appears in a popup screen where you can make the necessary edits.
- Double-click in certain fields to edit the data directly within the **Planning Console** view.

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۲ <u>۵</u>	Short description	Dependency	State	Planned start date
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1	Inititating		Closed Com	2019-02-14 08:00:00
2	Project Kick-off Meeting	1fs+0	Close 🔺	2019-03-03 08:00:00
3	Planning	2fs-2	<u>م</u>	2019-03-01 08:00:00
4	Executing o	3fs-2	Pending Open	2019-03-22 08:00:00
5	Execution Complete	4fs+0	Work in Progress	2019-06-20 08:00:00
6	Control o	3fs+0	Closed	2019-03-24 08:00:00
7	Closing o	5fs+0	Closed	2019-06-20 08:00:00



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### Dependencies

Add and edit task dependencies by dragging and dropping in the Gantt-chart to the right or double-clicking in the **Dependency** column.

To add an External Dependency:

- Go to the successor project (the second project that should be worked on after the first project / predecessor project). Right-click a task in the WBS section of the planning console.
- Click Add External Dependency.
- Select a project and task that must be worked on first for your successor project to be successful.
- Choose the **Dependency Type**. Soft just provides a notification. Hard will move project tasks and notify you.
- External dependencies are represented on the Planning Console via the link () icon and "Shadow Tasks" will appear on both predecessor and successor projects.

¢	Short description		Dependency	State
Â	▼ Enhance Credit Card authorization se			Pending
1	<ul> <li>Inititating</li> </ul>			Pending
1.1	Evaluation & Recommendations			Pending
1.2	Develop Project Charter		1.1fs+0	Pending
1.3	Project Sponsor Reviews Project		1.2fs+0	Pending
1.4	Project Charter Signed/Approved		1.3fs+0	Pending
2	Project Kick-off Meeting		1fs+0	Pending
3	Planning		2fs-2	Pending
4	Executing	•	3fs-2	Pending
5	Execution Complete		4fs+0	Pending
6	Control	0	3fs+0	Pending







## **Types of Dependencies**

The **Dependency column** on the planning console can specify dependencies between tasks. The values that you put in this column must be in the following format:

WBS Number | Dependency Type | Lag Time

anning	Dependency	Stat
u put in ng		Per
		Per
		Per
ig Time	1.1fs+0	Per
	1.2fs+0	Per
	1.3fs+0	Per

Project Task Dependenc	y values	
Dependency type	Example	Additional information
Finish to start	1.1fs+0	The task you are editing starts when task 1.1 is finished.
Start to start	1.1ss+0	Task 1.1 cannot finish until the task you are editing finishes.
Start to finish	1.1sf+0	Task 1.1 cannot start until the task you are editing finishes.
Finish to finish	1.1ff+0	The task you are editing cannot finish until task 1.1 finishes.



#### **Parent-Child Relationships**

The **WBS** section of the **planning console** allows you to create parent-child relationships for new tasks or move around existing tasks in a new parent-child relationship. The position of a task in the hierarchy and the level of indentation determine the parent-child relationship it has with the tasks above or below it.

In this example, the System Readiness Assessment task is a child of the Planning task because it is one level below the Planning task and is indented.

When you group child tasks together under a parent, values aggregate and roll up to the parent task. Planned start date and Planned end date rollup occurs, and duration of the parent automatically adjusts to cover its child tasks.

Parent-child task relationships have several effects on task time constraints:

- When a child task is set to Start ASAP:
  - The child task starts at the same time as the parent task, as long as it does not have dependencies with other child tasks.
- When a parent task is set to Start ASAP and child tasks are set to Start on Specific Date:
  - The earliest child task start date determines the start date of the parent, assuming no other dependencies.
  - In this case, the Time constraint field of the parent remains **Start ASAP**, but the actual start date is changed to the start date of the earliest child task.

1	$\vee$ Planning	•
1.1	System Readiness Assessment	•



#### Project Task State Roll Up & Roll Down

Some project task states roll up when you have parent and child task relationships

- When the state of the child task is manually changed to Work in Progress or Closed the parent state is updated
- **Pending** and **Open** do not roll up to the parent task

Project tasks can also roll down

• If you change the state of a Project to Closed, all tasks under it change to the default closed value (Closed Complete).

When you close a project, all project tasks are closed automatically. Normally, you should not reopen a project after it is closed.

Updating the project state from Closed to Work In Progress, Pending, or Open is not allowed.

If you still need to reopen a closed project, reopen an existing project task or add a new task to the project. This moves the project from Closed to Work in Progress state without affecting the other closed tasks and clears out the Actual end date since the project is no longer closed.



#### **Automatic vs. Manual Scheduling**

#### For Manual Scheduling (M):

- Dates on phases do not automatically reflect any changes from dependencies, however child task dates are reflected in parent phase tasks.
- New Projects created from the Project workbench are set to manual calculation by default. Projects created as manual can be changed to automatic.
- The Project timeline reflects the earliest planned start date and latest planned end date based on the Project tasks.

#### For Automatic Scheduling (A):

- A task automatically reflects any changes from its dependent and child tasks.
- New Projects created from the Project application are set to automatic calculation by default.
- A Project created as automatic with one or more tasks cannot be converted to manual.
- Once a project is changed from manual to automatic, it cannot be changed back.

Note: "Percentage completion" and "states" for phases are updated automatically for both manual and auto calculation.



