Default Views in Open Workbench
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Introduction
When Open Workbench is installed, it comes pre-loaded with a series of Views, grouped by Categories. The purpose of this Guide is to demystify the information that appears in the default Views. Open Workbench also allows users to modify the default Views or create their own Views. IT Design has a Views package available for free download.

Visit the Open Workbench Warrior website (http://workbenchwarrior.wordpress.com/) for more information and tutorials.

Views and Groups

Favorites Group

Gantt Chart – The Gantt Chart View provides information about the project and a graphical representation of the project schedule. By default, the View includes the following columns:

Task Area – the top portion of the display, which provides information about the project plan and hierarchy (Phases, Activities, Tasks, Milestones etc.)

- Task ID – users can optionally use alpha-numeric IDs to identify tasks. Each ID number must be unique throughout the project.
- Task Name – each row in the project must have a Name. Open Workbench, unlike MS Project, does not support empty rows. If a Task Name is left blank, a Task will be created (start & finish dates will appear) with an empty Task Name.
- Start – The Task Start Date – the date on which the Task started, or is scheduled to start.
- Finish – The Task Finish Date – the date on which the Task finished, or is scheduled to finish.
- Time-scaled View – This is the right-hand portion of the window, which shows a graphical representation of the project plan.

Resource Area – the bottom portion of the display, which provides information about the resources (people, expenses, material resources, etc.) allocated to the Project.

- Resource ID – each Resource must have an ID (which corresponds to MS Project’s Resource Initials field). Unlike MS Project, however, the Resource ID field cannot have duplicates.
- Resource Name – self-explanatory field name.
- Resource Availability Start – this is the first date on which the Resource is available for allocation to the project. The Availability field is controlled by (among others) the Calendar assigned to the Resource, the Resource Start Date.
- Resource Availability Finish – this is the final date on which the Resource is available.
- Time-scaled View – This field holds the Task Total Usage for the Resource. This is a calculated field which is a combination of the Actual Usage plus the Estimate to Complete, across all Tasks, for the Resource.

CPM Network – The CPM Network is a PERT Chart view which provides a graphical representation of the project plan, highlighting the Critical Path.

Phase Level Gantt – The Phase Level Gantt View is exactly the same as the Gantt Chart View, but with information aggregated (rolled up) to the Phase level.
Planning Group

**WBS Definition** – The WBS Definition View provides a Task List to enable the Project Manager to build up their project plan. By default, the View includes the following columns:

- **Task Type** – There are 5 default Task Types (Phase, Activity, Task, Milestone and WBSLevel3 – WBSLevel15). Each row in the project plan must have a Task Type so the project hierarchy can be established.
- **Task ID** – users can optionally use alpha-numeric IDs to identify tasks. Each ID number must be unique throughout the project.
- **Task Name** – each row in the project must have a Name. Open Workbench, unlike MS Project, does not support empty rows. If a Task Name is left blank, a Task will be created (start & finish dates will appear) with an empty Task Name.
- **Category** – This is a free-text field which enables the Project Manager to categorise tasks (e.g. by Phase, or perhaps by delivery team) for filtering and sorting purposes.
- **Deliverables** – This field is inactive in the current version of Open Workbench.
- **Key Task?** – The Project Manager can nominate a Phase, Activity, Task or Milestone as a “Key” task for reporting purposes.

**Dependency Definition** – This View is somewhat mis-named, in that it offers the opportunity to view dependency relationships between tasks, but does not provide the ability to create those relationships. By default, the View includes the following columns:

- **Task ID** – users can optionally use alpha-numeric IDs to identify tasks. Each ID number must be unique throughout the project.
- **Task Name** – each row in the project must have a Name. Open Workbench, unlike MS Project, does not support empty rows. If a Task Name is left blank, a Task will be created (start & finish dates will appear) with an empty Task Name.
- **Relation** – This field will show whether the Related Task is a Successor of, or a Predecessor to the current task.
- **Task ID** – users can optionally use alpha-numeric IDs to identify tasks. Each ID number must be unique throughout the project.
- **Related Task** – This field holds the Name of the Task with which the current Task has a relationship.
- **Dep Type** – This is the Dependency Type, which can be one of the following:
  - Finish -> Start
  - Start -> Start
  - Finish -> Finish
  - Start -> Finish
- **Lag** – This field shows the number of days (or percentage of Task Duration) between the tasks
- **Lag Type** – This field is related to the Lag field, and shows whether the Lag displays a Daily number or a Percentage of Task Duration.
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**Resource Assignment** – The Resource Assignment View provides information about the task assignments for the project. By default, the View includes the following columns:

*Task Area* – the top portion of the display, which provides information about the project plan and hierarchy (Phases, Activities, Tasks, Milestones etc.)

- Task ID – users can optionally use alpha-numeric IDs to identify tasks. Each ID number must be unique throughout the project.
- Task Name – each row in the project must have a Name. Open Workbench, unlike MS Project, does not support empty rows. If a Task Name is left blank, a Task will be created (start & finish dates will appear) with an empty Task Name.
- Resource ID – The ID of the Resource assigned to the Task (there will be one Resource/Task relationship modeled per row in the View).
- ETC – The effort Estimate to Complete for the Resource/Task assignment.
- Loading Pattern – The Loading Pattern dictates when and how the Resource will complete their work on the Task. By default, the ‘Front’ Loading Pattern is used, which means the project plan will model the resource completing their work as early as possible.

*Resource Area* – the bottom portion of the display, which provides information about the resources (people, expenses, material resources, etc.) allocated to the Project.

- Resource ID – each Resource must have an ID (which corresponds to MS Project’s Resource Initials field). Unlike MS Project, however, the Resource ID field cannot have duplicates.
- Resource Name – self-explanatory field name.
- Resource Category – much like the Task Category field, Resources can be categorized (perhaps by Team) for filtering and sorting purposes.

**Executing Group**

**Schedule** – The Schedule View provides a Task List to enable the Project Manager to manage their project plan. By default, the View includes the following columns:

- Task ID – users can optionally use alpha-numeric IDs to identify tasks. Each ID number must be unique throughout the project.
- Task Name – each row in the project must have a Name. Open Workbench, unlike MS Project, does not support empty rows. If a Task Name is left blank, a Task will be created (start & finish dates will appear) with an empty Task Name.
- Start – The Task Start Date – the date on which the Task started, or is scheduled to start.
- Finish – The Task Finish Date – the date on which the Task finished, or is scheduled to finish.
- Locked? – This check-box indicates whether the Task is Locked for Scheduling. If a Task is Locked for Scheduling, that means the Project Manager has indicated it cannot be altered during the AutoSchedule process.
- Dur. – This field shows the Task Duration.
- Fixed – This check-box indicates whether the Duration has been Fixed. If ticked, it means the Duration cannot change and the effort to complete the Task must be re-ordered within the nominated Duration. If unticked, it indicates the Task is effort-driven.
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- **Res ID** – This is the ID of the Resource assigned to the Task (there will be 1 row in the View for each Resource/Task assignment).

- **ETC** – This is the effort Estimate to Complete for the Resource/Task assignment.

- **Loading Pattern** – see above for a description of Loading Patterns.

- **Time-scaled View** – This shows the Estimate to Complete by time-period. By default, the View shows weekly ETC for 10 weeks from the Project Start Date.

**Resource Area** – the bottom portion of the display, which provides information about the resources (people, expenses, material resources, etc.) allocated to the Project.

- **Resource ID** – each Resource must have an ID (which corresponds to MS Project’s Resource Initials field). Unlike MS Project, however, the Resource ID field cannot have duplicates.

- **Resource Name** – self-explanatory field name.

- **Resource Availability Start** – this is the first date on which the Resource is available for allocation to the project. The Availability field is controlled by (among others) the Calendar assigned to the Resource, the Resource Start Date.

- **Resource Availability Finish** – this is the final date on which the Resource is available for allocation to the project.

- **Availability:** - This is not an Open Workbench field, but is meant to operate as a Column Heading (you can’t place column headings for the bottom portion of the window).

- **Resource Availability** – this field shows the number of hours per day the Resource is available for work.

- **Time-scaled View** – This field holds the Task Estimate to Complete for the Resource. This is a calculated field which is a combination of the Actual Usage plus the Estimate to Complete, across all Tasks, for the Resource.

**Dependency Status** – The Dependency Status View provides a similar View to the Dependency Definition View mentioned under the Planning Group. By default, the View includes the following columns:

- **Task ID** – users can optionally use alpha-numeric IDs to identify tasks. Each ID number must be unique throughout the project.

- **Primary Task** – the Name of the Task.

- **Finish** – The Task Finish Date – the date on which the Task finished, or is scheduled to finish.

- **Relation** – The relationship to the dependent task

- **Task ID** – The Task ID of the dependent task

- **Related Task** – The Task Name of the dependent task

- **Start** – The Start Date of the dependent task

- **Dep Type** – The Dependency type of the relationship

- **Lag** – The number of days (or % of duration) between the two tasks

- **Lag Type** – Whether the Lag field shows number of days or % of duration.
### Controlling Group

#### Status Update
The Status Update View provides a snapshot of the current effort usage at the Task level. By default, the View includes the following columns:

- **Task ID** – users can optionally use alpha-numeric IDs to identify tasks. Each ID number must be unique throughout the project.
- **Name** – the Name of the Task.
- **Res ID** – The ID of the Resource assigned (there will be 1 row per Resource/Task assignment).
- **Middle section (no column header)** – Assignment Actual Usage – the number of Actual Effort hours booked by the Resource to the Task in the current week.
- **Total Actual (Hours)** – The total effort hours booked by the Resource to the Task.
- **Pending ETC [CA Time] (Hours)** – This is a CA Clarity PPM field, not related to using Open Workbench in stand-alone mode.
- **ETC (Hours)** – The estimated effort to complete the assignment.
- **Start** – The Assignment Start Date
- **Finish** – The Assignment Finish Date
- **Status** – The Task Status

#### Unused Availability
The Unused Availability View shows how much “free” time your project team has. By default, the View includes the following columns:

- **Res ID** – The Resource ID
- **Resource Name** – the Name of the Resource
- **Category** – the Resource Category.
- **Default Avail** – the default number hours per week the Resource is available for work.
- **Time-scaled View** – the amount of remaining availability (or unallocated time) for the Resource, per week. By default this field shows unused availability as a percentage of availability, but it can easily be changed to show unused availability by hours.

#### Variance Analysis
The Variance Analysis View provides a snapshot of the project's progress against the current Baseline. By default, the View includes the following columns:

- **Task Name** – The Resource ID
- **Status** – the Task Status
- **Field Label Column**
- **Start** – Over 3 rows, this field shows the Planned (or Actual) Start Date, the Baseline Start Date and the Variance between Baseline and Actual
- **Finish** - Over 3 rows, this field shows the Planned (or Actual) Finish Date, the Baseline Finish Date and the Variance between Baseline and Actual
- **Usage** - Over 3 rows, this field shows the Planned (or Actual) Usage, the Baseline Usage and the Variance between Baseline and Actual. By default, 'Usage' is represented in Hours of Effort, but can easily be changed to show Cost.
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**Revise Schedule** – The Revise Schedule View provides a snapshot of information about the project and allows the Project Manager to revise the plan. By default, the View includes the following columns:

*Task Area* – the top portion of the display, which provides information about the project plan and hierarchy (Phases, Activities, Tasks, Milestones etc.):

- Task ID – users can optionally use alpha-numeric IDs to identify tasks. Each ID number must be unique throughout the project.
- Task Name – each row in the project must have a Name. Open Workbench, unlike MS Project, does not support empty rows. If a Task Name is left blank, a Task will be created (start & finish dates will appear) with an empty Task Name.
- Start – The Task Start Date – the date on which the Task started, or is scheduled to start.
- End – The Task Finish Date – the date on which the Task finished, or is scheduled to finish.
- Res ID – the ID of Resources assigned to the Task. There will 1 row per Resource assigned.
- Estimate (Hours) – the Estimate to Complete, represented in hours.
- Estimate (Cost) – the Estimate to Complete, represented in funding
- Duration – the Task Duration
- Fixed Dur? - shows the tick-box ticked if the Duration has been fixed, or un-ticked if the Task is effort-driven
- Time-scaled View – shows the Effort Estimate to Complete. By default, the View shows 30 days from the Project Start Date.

*Resource Area* – the bottom portion of the display, which provides information about the resources (people, expenses, material resources, etc.) allocated to the Project:

- Resource ID – each Resource must have an ID (which corresponds to MS Project’s Resource Initials field). Unlike MS Project, however, the Resource ID field cannot have duplicates.
- Resource Name – the Name of the Resource
- Resource Availability – the number of days per week the Resource is available for work.

**Filters & Sorts Group**

The Filters & Sorts Group isn't a list of Views as such, but works in conjunction with the Views to enable the Project Manager to filter, or sort the information shown.

**Clear Filters** – This option removes all filtering from the current View, and resets the View to its default settings.

**Clear Sorts** – This option removes all sorts from the current View, and resets the View back to its default settings.

**Key Tasks** – This option filters the View so that only Key Tasks, and their hierarchical parents, are displayed.

**Sort by Resource** – This option sorts the Resource portion of the View alphabetically, by Resource ID.

**Pending ETC** – This option is relevant only for those using Open Workbench in conjunction with CA Clarity PPM. It refers to when a team member changes the ETC in their weekly timesheet.
Conclusion

That concludes our look at the standard Open Workbench Views, installed with the application. The best way to learn more about Views is to work with them and try things out. If you get stuck or want some advice, please feel free to leave a comment on the Working With Views page of the Open Workbench Warrior.