

Ask the Expert: Timeline view in MS Project 2010 – Selling your Message November, 2011

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Julie from New York City asks: I am in the process of putting a proposal together for a prospective client. The client will have 8 batches of work to be completed. I need to lay out what it will take to one batch of work building in hidden contingency time. I would also like to show the timeline graphically. Each batch should take about five to six months to complete and I need to highlight check points for the client. Any ideas?

Ellen answers: MS Project 2010 Pro and Standard have the Timeline view which could help you present your timeline graphically to your client. You'll want to stay at a high level showing just the tasks that will drive the batch of work you want to represent. I would also suggest entering some milestones to represent goal points for the timeline.

Here are the requirements as you have stated them:

1. Each batch of work is expected to take five to six months of duration.
2. Each batch needs to include some slack for contingencies that may occur which the client won't see.
3. The client will approve work during the project and approval points should be shown on the timeline.

To create the Timeline view to meet these requirements the tasks to be shown in the view must be identified. All of the tasks must be present in the task list. The tasks should be higher level rather than detail level but detail tasks can be included in the Timeline view. The client approval points should be entered as milestones. Names on tasks should be clear to denote what work will occur with each task. In other words, don't use "company speak" which are terms that only internal employees understand. Use terms that are easily understandable to the client to make sure you are conveying a clear message.

The next step would be to filter out only the tasks that should be shown in the Timeline View: This can be done several ways but the easiest it to Mark each task and apply the autofilter to the Gantt view.

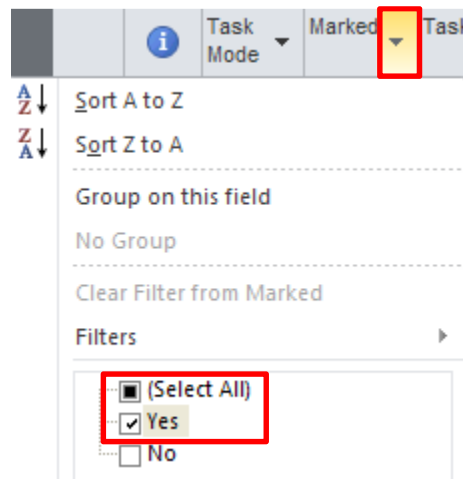
To mark tasks to be filtered for the Timeline view insert the Marked column:

- Right click on the Task name column → Insert column → Marked



The Marked column contains only a Yes or No value. Tasks that are to be included in the Timeline view should be marked "Yes". Note how summary and milestones tasks are marked "yes". See the example below.

Marked	Task Name
Yes	<input type="checkbox"/> Proposal for ABC Company
Yes	<input type="checkbox"/> Scope
No	Determine project scope
No	Secure project sponsorship
No	Define preliminary resources
No	Secure core resources
Yes	ABC Company acceptance of scope
Yes	<input type="checkbox"/> Analysis/Software Requirements
No	Conduct needs analysis
No	Draft preliminary software specifications
No	Develop preliminary budget
No	Review software specifications/budget with team
No	Incorporate feedback on software specifications
No	Develop delivery timeline
No	Obtain approvals to proceed (concept, timeline, budget)
No	Secure required resources
Yes	ABC Company acceptance of Analysis

Once all tasks are marked it is easy to apply the autofilter to display on the “Yes” values in the Marked column. Click on the down arrow to the right of the Marked column name, remove the checkmark next to Select all and select “Yes”. Then click OK to apply the filter.



With the filter applied you should be viewing just the tasks that will be contained in the Timeline report.

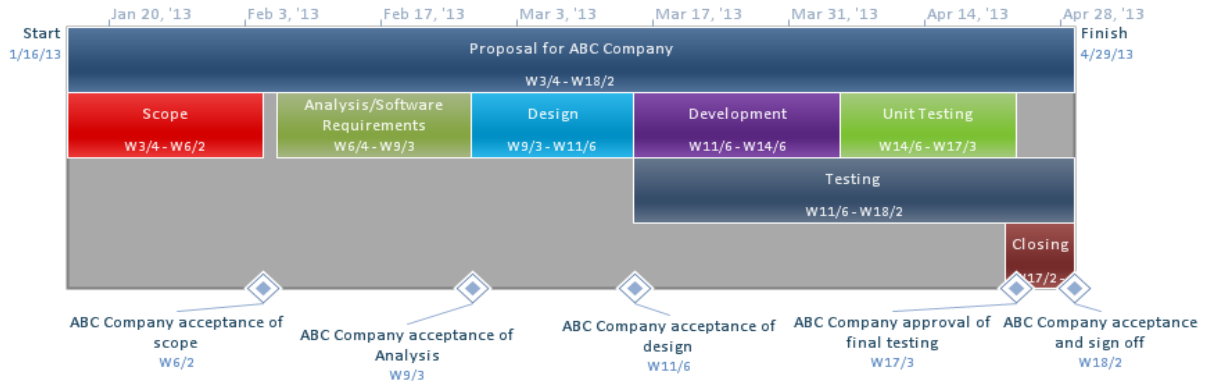
Marked 	Task Name 
Yes	<input type="checkbox"/> Proposal for ABC Company
Yes	<input type="checkbox"/> Scope
Yes	ABC Company acceptance of scope
Yes	<input type="checkbox"/> Analysis/Software Requirements
Yes	ABC Company acceptance of Analysis
Yes	<input type="checkbox"/> Design
Yes	ABC Company acceptance of design
Yes	<input type="checkbox"/> Development
Yes	<input type="checkbox"/> Testing
Yes	<input type="checkbox"/> Unit Testing
Yes	ABC Company approval of final testing
Yes	<input type="checkbox"/> Closing
Yes	ABC Company acceptance and sign off

Select all of the tasks, right click on the selection and select “Add to Timeline”. If the Timeline view is not automatically displayed, click on the View tab and click on the Timeline option to display the Timeline view.

If you need to tweak the Timeline view, click in the Timeline view then click on Format tab on the ribbon bar to access Timeline view formatting options:

- Adjust the time density using the **time zoom** at the bottom right corner of the view.
- If labels for milestones overlap, select and drag them to make viewing easier.
- Adjust the date labels using the Date Format options
- Click on a **Timeline bar** and change font, color, bold, italic, underline, text styles, etc to format the Timeline view.
- If a bar ends up in the view that should be removed, click on the bar and click on **Remove From Timeline**.

Below is an example of the finished Timeline view. Note along the bottom the client’s responsibilities are shown as milestone points.



Clicking in the Timeline view and selecting Copy Timeline will give you several options to copy the view for Email (or Word), for Powerpoint or as a full-size image. Once copied, the image can be pasted.

When creating a proposal or communicating a timeline for others to view, the Timeline view is a wonderful tool to help you convey your message. Keep detail data to a minimum and add higher level tasks (summaries). Milestones will help point out important points in time. Having the tasks Marked will make it easy to reproduce this view in the future.