

WBS Chart Pro

Quick Reference Guide

Installation Instructions, Getting Started Guide
and Tutorials for the WBS Chart Pro software

The complete WBS Chart Pro User's Guide can be found on
the installation CD (WBSProDoc.PDF) or can be downloaded
from our website at www.criticaltools.com/doc

WBS Chart Pro

Copyright © 1994-2010 Critical Tools, Inc. All rights reserved.

Information in this document is subject to change without notice. The software described in this document is furnished under a license agreement. It may be used only in accordance with the terms of the agreement. It is against the law to copy the software on any medium except as specifically allowed in the license agreement.

No part of this manual may be reproduced or transmitted in any form without the express written permission of Critical Tools, Inc.

Critical Tools, Inc.
7308 West Rim Drive
Austin, Texas 78731 USA
+1 512 342 2232 phone
+1 512 342 2234 fax

Visit our website at www.criticaltools.com

Send your comments, questions or suggestions to
support@criticaltools.com

WBS Chart Pro is a trademark of Critical Tools, Inc. Microsoft Project and Microsoft Windows are registered trademarks of Microsoft Corporation.

WBS Chart Pro – Quick Reference Guide

Table of Contents

Installation	4
Installing WBS Chart Pro for Standalone use.....	4
Installing WBS Chart Pro for use with Microsoft Project.....	4
Installing WBS Chart Pro on a Network	5
Downloading the software from our website.....	6
Troubleshooting Installation Problems	6
Getting Started	9
Terminology and Basic Concepts.....	9
Creating projects in WBS Chart Pro	10
Creating WBS charts from Microsoft Project.....	11
Working with WBS charts.....	12
Tutorials	17
Tutorial #1 - Creating a new WBS chart.....	17
Tutorial #2 - Creating a WBS chart from MS Project.....	23

Installation

Installing WBS Chart Pro for Standalone use

To use WBS Chart Pro standalone (without the interface to Microsoft Project), insert the CD and follow the installation instructions. When prompted to modify Microsoft Project, choose **No**.

If the Setup program does not start automatically when the CD is inserted, doubleclick the Setup file on the CD.

Do you have a Product ID?

If you have a Product ID, enter this number when prompted during Setup. This will activate the full version of the software.

No Product ID – Use as Demo

If you do not have a Product ID, the software can only be installed as demo software on a 50 task/30 day trial basis. If you purchase the software and obtain the Product ID, there is no need to reinstall, just start WBS Chart Pro, select Help>About WBS Chart Pro and select Register to enter the ID.

With the exception of the 30 day and 50 task limit, the Demo software functions just like the full version.

Installing WBS Chart Pro for use with Microsoft Project

To configure WBS Chart Pro to work with Microsoft Project, Setup asks if you wish to Modify Microsoft Project. Answer **Yes** to configure Microsoft Project to work with WBS Chart Pro.

Note: If you configure WBS Chart Pro to work with Microsoft Project it adds a WBS Toolbar button, a Macro, a few Views and a few Tables to the Global.mpt file of Microsoft Project. It will not overwrite any existing items in the Global.mpt file nor will it add or overwrite data in any existing Microsoft Project (.mpp) file.

If you have Microsoft Project installed on your local computer you should see a WBS Chart Pro toolbar button in Microsoft Project after installation. Click this button to create a WBS chart of a Microsoft Project plan.

The WBS Chart Pro toolbar button within MS Project looks like this:



If you do not see the WBS button in Microsoft Project, see the section on Troubleshooting Installation Problems.

Installing WBS Chart Pro on a Network

WBS Chart Pro can be installed on a network and can be used with Microsoft Project installed on a local computer or on a network.

Named User vs. Concurrent

WBS Chart Pro supports Named User licensing when installed on a network. This means that if a user will be using the software they must have a license. Concurrent Use Licensing where any number of users can access the software but not more than a certain number at one time is not supported.

Steps to install WBS Chart Pro on a network:

1. Run Setup and install WBS Chart Pro on the network drive. Enter the Product ID when prompted.
2. Assign access rights to the WBS Chart Pro folder on the network for each user.
3. The first time each user starts WBS Chart Pro from their workstation they will be in Demo mode. Go to

Help-About WBS Chart Pro, select Register and enter the Product ID.

Downloading the software from our website

The latest version of WBS Chart Pro is always available on our website. Upgrading within the same major version is free (from version 4.5 to 4.6, for example). Download the software if you have an earlier version on your CD, if you have lost your CD or it is damaged. Use the same ID that was sent to you to activate the full version during Setup.

After downloading from our website, if you receive an error message when installing that is similar to the following:

“Corrupt Installation Detected”

it may mean that you have a firewall or other security software in place that is damaging the file when downloading. Turn the firewall and/or security software off and download again.

Troubleshooting Installation Problems

The following are common installation problems and solutions.

Setup did not add the WBS Chart Pro button to a local version of Microsoft Project

If you chose to modify Microsoft Project during Setup and you do not see a WBS toolbar button within Microsoft Project, try the following:

1. Start Microsoft Project.
2. Select Tools-Macro-Security and set it to Medium.
3. Click OK.
4. Go to File-Open and open the folder where you installed WBS Chart Pro (C:\Program Files\WBS Chart Pro by default).
5. Select the file SetupWBSxxxx (where xxxx is the version of Microsoft Project you are using).

6. Select Open.
7. Select Enable Macros if prompted.
8. Close this file without saving.

If you see the WBS toolbar button now, close Microsoft Project and start it again. If the WBS button in Microsoft Project is still there then you should be OK.

If you do **not** see the WBS Chart Pro toolbar button within Microsoft Project, make sure you have rights to access the global.mpt file. This is a Microsoft Project file where items such as toolbar buttons and macros are stored. You need access rights to this file to install WBS items into Microsoft Project. Get access rights to this file and try again.

If you see the WBS Chart Pro button in Microsoft Project but it does not work, close Microsoft Project and run the WBS Chart Pro Setup program.

Setup did not add the WBS Chart Pro button to a Network version of Microsoft Project

This is most likely due to the fact that you do not have access rights to modify Microsoft Project. If you are granted access rights to modify Microsoft Project on the Network, try the 8 steps listed earlier to add the WBS Chart Pro toolbar button.

Microsoft Project displays a “Visual Basic” error message during Setup

If, during Setup, you receive a “Visual Basic” message or any message from Microsoft Project with the words “Visual Basic”, try adding the WBS button using the 8 steps listed earlier.

If you still receive a “Visual Basic” message after using the 8 steps described earlier this probably means that Microsoft Project is having trouble with its Visual Basic component. Try running a Microsoft Project macro to confirm this. If it fails you should reinstall Microsoft Project.

The message “You Have Modified a Signed Project...” is displayed during Setup

The message “You have modified a signed project. You do not have the right to sign this project. The signature will be discarded”, may appear after WBS Chart Pro modifies Microsoft Project. This is a Microsoft Project message and appears when you are the first one to modify Microsoft Project’s global.mpt file (where the WBS items are copied). You can disregard this message. It does not affect the operation of Microsoft Project or WBS Chart Pro and will not appear again.

Getting Started

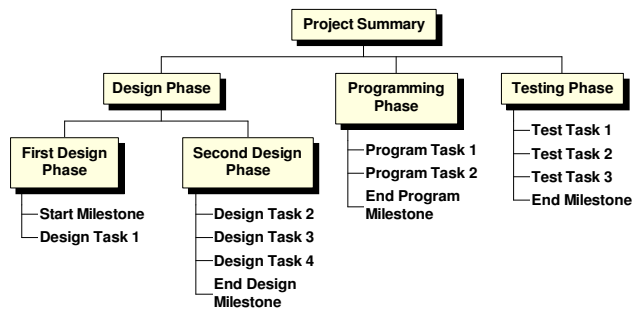
Terminology and Basic Concepts

WBS Chart

A WBS chart or Work Breakdown Structure chart is a type of diagram that displays a project in a Top-Down fashion. It shows the structure of a project and how the project breaks down into various summary (phase) and task (detail) levels.

A WBS chart can also show the rollup of information to each level of the project depending on the View selected.

Here is an example of a WBS chart:



Summary Tasks and Tasks

A Summary Task in WBS Chart Pro is anything with a subordinate. A Task is the lowest level item in the chart. As you create your chart in WBS Chart Pro you will define Summary Tasks as the “Phases” in your project and Tasks as the lowest level of detail. You create a Summary Task by inserting a subordinate.

As you enter Tasks in the chart you can enter information such as (but not limited to) the Name of the Task, Duration, Start, Finish, Work, and Cost. This information is rolled up to the Summary Tasks in the chart.

Doubleclick a box to enter and view information for a Summary Task or Task.

Note: If you doubleclick on an item in the WBS chart and cannot change the information it is because that item is a Summary Task. Fields like Duration, Start, Finish, Work and Cost cannot be changed in a Summary Task because this information is automatically rolled up from the Tasks in the project.

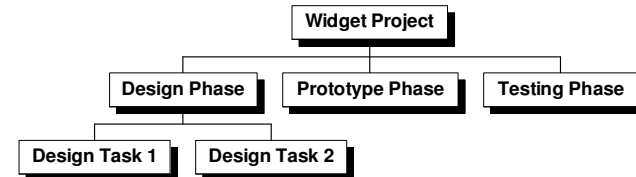
Creating projects in WBS Chart Pro

Starting WBS Chart Pro displays a blank planning screen. To create Summary Tasks (Phases) and Tasks use the left/right/up/down arrow toolbar buttons.



To add the first item in your plan you must click the Down arrow. Add other items below to the left or to the right of your first box. Select a box and type to enter a description. Doubleclick to enter additional information.

Below is a WBS chart in progress:



In the above example, the Prototype Phase and Testing Phase are tasks since they do not have subordinates. Once you add subordinates to Prototype and Testing they will automatically become Summary Tasks.

A red outline appears around the “current” task. Click any task box to make it the current task and insert tasks using the arrow buttons relative to the current task.

You can also add items by using the **Alt-Arrow Key** combination. Hold the Alt key down and press the up/down/left/right arrow key on your keypad to add a task in the chart relative to the current task.

See the Tutorials for step by step instructions on how to create a project in WBS Chart Pro.

Creating WBS charts from Microsoft Project

To create a WBS chart from an existing plan in Microsoft Project, open a plan in Microsoft Project and click the WBS Chart Pro toolbar button.

This starts WBS Chart Pro and creates a WBS chart of the current plan.

If you do not see the WBS Chart Pro toolbar button in Microsoft Project see the Installation section of this guide.

When you create a WBS chart of a Microsoft Project plan you are dynamically linked to this plan. This means that any changes you make in the WBS chart are automatically and immediately reflected back in Microsoft Project.

Filtering and Collapsing Tasks in Microsoft Project

In your Microsoft Project plan, if you apply a filter or collapse tasks and click the WBS Chart Pro toolbar button it will create a WBS chart of only those tasks that are currently displayed in Microsoft Project. This is useful for large charts where you only want to view a certain subset of tasks in a WBS chart.

Saving WBS charts created from Microsoft Project plans

If you create a WBS chart from a Microsoft Project plan and save the WBS chart it saves the WBS chart **and** the corresponding Microsoft Project file. It also creates a link from the WBS chart file to the Microsoft Project plan.

Note: It is important to remember that the WBS chart itself does not contain your project data. The project data is stored in Microsoft Project (in the *.mpp file). The WBS chart (the *.wbs file) only contains the WBS chart formatting.

Opening the WBS chart file at a later time will open the corresponding Microsoft Project plan. Conversely, opening the Microsoft Project plan and clicking the WBS Chart Pro toolbar button will open the previously saved WBS chart so you can continue working exactly where you left off.

Working with WBS charts

Whether you create a WBS chart from scratch or one from an existing Microsoft Project plan here are some tips for working with a WBS chart:

Views

There are many ways to display a WBS chart and you can create **Views** to display the same project in different ways. WBS Chart Pro includes several Views that show various fields of information and various arrangements of tasks. You can choose a View you like, modify an existing View or create a new View.

Switch Views using the Previous View and Next View arrows or choose a specific View from the drop down list.



Hint: Try using the Planning View for creating projects and the Critical Path View for displaying existing projects. The Planning View lists Summary Tasks and Tasks in a top/down and left/right fashion which makes it easy to add items to your chart but tends to make charts very wide. The Critical Path View will stack Tasks vertically under their respective Summary Tasks which makes for a more condensed chart.

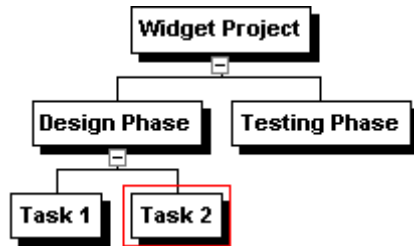
Moving and Repositioning Tasks

There are two ways to rearrange a task in a chart. One is to Move it (which involves Cutting and Pasting to another place in the WBS chart thus changing the structure of the chart). The other is to Reposition it but not change the structure.

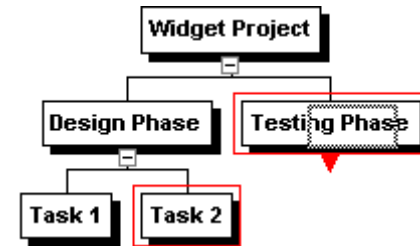
To **Move** a task, click the task you want to move and drag it over another task.

When you drag a task over another, a red arrow appears indicating the insertion point (below, to the left, to the right or above the task). Pick a direction and release the mouse button to move the task relative to the box you placed it over.

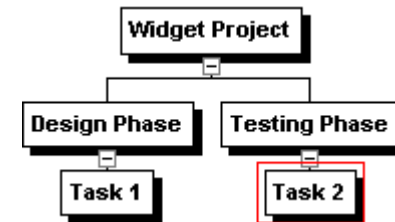
The following example will **Move** Task 2 and place it below the Testing Phase:



To Move Task 2 below the Testing Phase, click on Task 2...



...drag it **over** the Testing Phase box until you see the red arrow pointing down...

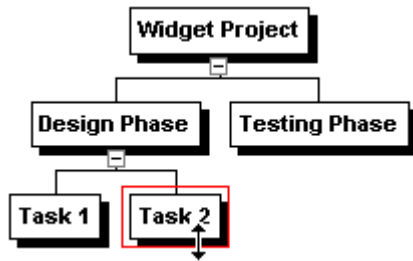


...and release the mouse to place Task 2 under the Testing Phase box.

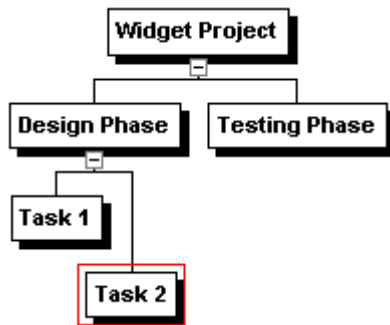
Hint: Moving a Summary Task by clicking and dragging will Move it and all of its subtasks.

To **Reposition** a task, click the edge of the box and drag it to a new location. Repositioning a task keeps it under the same Summary Task thus keeping the overall structure the same. Repositioning is useful for utilizing the space at the bottom of your WBS chart when printing. By selectively repositioning Summary Tasks and Tasks in your WBS chart you can make a wide chart narrower which will then print on fewer pages.

Example of **Repositioning** a task:



To Reposition Task 2 down, place your cursor on the top or bottom edge of the box until you see an up/down arrow...



...and drag the task down.

Note: You can only reposition a task relative to one above it or to the left of it. Therefore you cannot reposition the top task or the leftmost task.

Expanding and Collapsing

The - (minus) symbol below a Summary Task is the collapse feature. Click this to collapse the Tasks to show only the Summary Task. Click the + (plus) symbol to expand and display Tasks that were collapsed.

You can also select a Summary Task and use the Expand (+) or Collapse (-) buttons on the Toolbar.

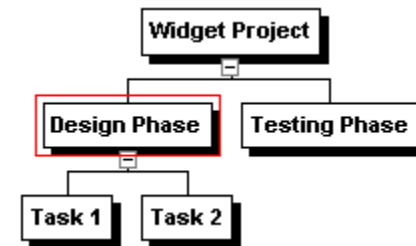


Click the ++ button to expand all Summary Tasks in the WBS chart. Click the -- button to collapse all of the Summary Tasks in the WBS chart. See the next section on using the Focus button (the up/down arrow).

Focus

Select focus button (the up/down arrow on the toolbar) to display only the selected Summary Task and all tasks below it. This is useful for working on one section of your plan. Select the Focus button again to remove the focus.

An example of **Focus**:



Select the Design Phase Summary Task...



... and click the Focus button to display only the Design Phase. Click the Focus button again to restore the entire chart.

Tutorials

The following tutorials are intended to introduce you to the basic functionality of WBS Chart Pro using two approaches; first, how to create a WBS chart from scratch and second, how to create a WBS chart from Microsoft Project. The tutorials will show you how to use the most popular features of WBS Chart Pro. Refer to the PDF User's Guide or Help within the software for a complete explanation of **all** of the features of WBS Chart Pro.

Tutorial #1 - Creating a new WBS chart

When you start WBS Chart Pro a blank screen is displayed for you to begin planning a project.

Creating Summary Tasks (Phases) and Tasks

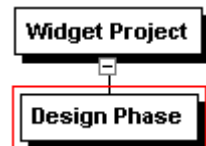
To create your first box, click the **Down Arrow** on the toolbar.



This will create a single box at the top of the screen. Name this box by typing in a description. For example,



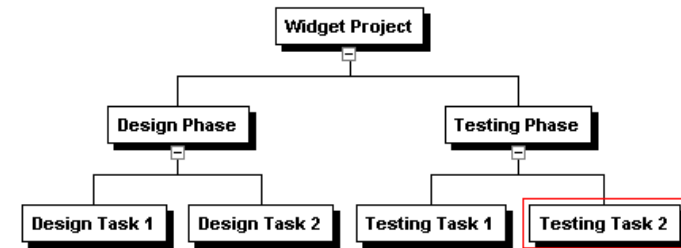
Click the Down arrow to create a subordinate to this top box. Name this box by typing in a description, like this:



To create another "Phase" after the Design Phase, click the right arrow. To create a subordinate to the Design Phase click the down arrow.

Note: The red box indicates the selected or "current" task. You create new boxes relative to this selected box.

Create another phase and two tasks for each phase using the arrows to produce a project like the following chart:

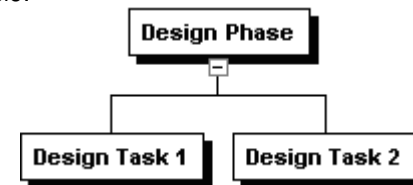


If your chart does not look like this, see Tip #2 below.

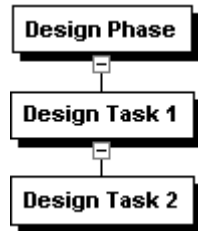
Important Tips:

Tip #1: When creating subordinates, place them under their respective parent in a left to right manner, not beneath each other.

For example:



This is the correct way to add subordinate tasks. Design Task 1 and Design Task 2 are the children to the Design Phase parent.



This is **not** the correct way to add subordinate tasks. Design Task 1 should not be the parent of Design Task 2 as depicted here. This would produce improper summarization of data.

Tip #2: We recommend using the **Planning View** to create projects. The Planning View arranges Summary Tasks and Tasks in a top-down and left-right fashion similar to an Org Chart.

If your chart looks different then the one on the previous page, switch to the Planning View by selecting the View drop-down list on the toolbar as shown below:



If you are currently in the Planning View and it still does not look like the picture as described before Tip #1 then go to Format-Chart, select Org Chart Style from the Style list and click the Reset All button.

Entering Task Information

To enter information for a task, doubleclick the task to display the Task Information form. This form is where you enter information such as Duration, Cost, Work, etc.

The information you enter for a task is rolled to each level of your project. Each Summary Task in your chart contains the rollup of information from the items below it.

Note: If you doubleclick a box and cannot edit the information it means that it is a Summary Task and the information is being rolled up from the tasks below. Summary Task fields like Start, Finish, Duration, Work and Cost are calculated from the task data below it and cannot be edited.

Rearranging the WBS chart

As you develop your WBS chart you can always rearrange tasks in the chart by clicking and dragging to move a task or summary task.

When you move a box from one area to another remember that you click on a box, drag it over another box until you see the left/right/up/down arrows and let go.

Views

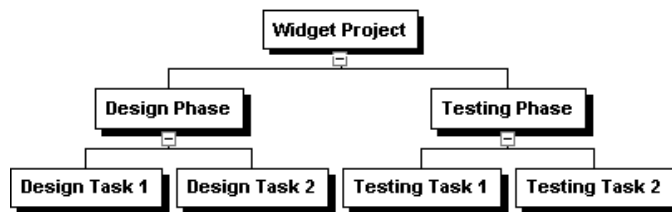
A View is way of looking at a WBS chart and includes various styles for displaying the arrangement of tasks and fields within the boxes.

To pick a different View, click the View drop down list on the Toolbar and pick one or click the left/right arrow to switch between Views.

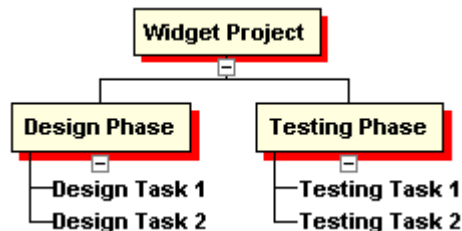


We recommend creating your WBS chart using the Planning View as we have done in this Tutorial. Once you have the majority of the plan in place you may want to consider switching to the Critical Path View. This view displays Tasks vertically under their respective Summary Task and gives a more compact view of the data.

As an example, this WBS chart was developed using the Planning View:



This is the same plan using the Critical Path View:



The other Views in the list of Views contain variations of these two types of Views. Switch to the one you want. You can also modify a View to display data the way you want.

To modify a View, switch to it and format it using the options under the Format Menu. If you change the way a View looks it will be saved in the current chart and saved over the default View so that any **new** charts will contain these changes.

Note: Before you modify a View make a copy of it so you will have the original View. To copy a View, click the ... button on the View toolbar and select Copy. Rename the View and click OK to make it the active View.

Printing the WBS chart

To print a chart it is always best to display it in Print Preview first. Select File-Print Preview to display the WBS chart in Print Preview.

While in Print Preview you can edit the layout of the page or set the Titles.

Transferring a WBS chart to Microsoft Project

To transfer a WBS chart to Microsoft Project click the Goto Project button within WBS Chart Pro. This will automatically start Microsoft Project and transfer the WBS chart to a Microsoft Project plan.

The Goto Project button within WBS Chart Pro looks like this:



Transferring a WBS chart to Microsoft Project moves all of the project data out of the WBS chart file (the .wbs file) and places it into a Microsoft Project file (the .mpp file). You will then have two files, a .wbs file that contains the WBS chart formatting and a .mpp file that contains the project data.

Note: Once you transfer a WBS chart to Microsoft Project the WBS chart no longer contains data but is dynamically linked to the Microsoft Project data. Any changes you make to the WBS chart are instantly reflected in the corresponding Microsoft Project plan where the data is now stored. After you transfer a WBS chart to Microsoft project, make sure you save the Microsoft Project plan to save your data!!

Tutorial #2 - Creating a WBS chart from Microsoft Project

If you have a Microsoft Project plan and wish to create a WBS chart from this plan, the following tutorial will show you how to accomplish this. It will also show you various features that you can use to manage your Microsoft Project plans using WBS Chart Pro.

Create a WBS chart from an existing Microsoft Project plan

For this tutorial we will use the sample Microsoft Project plan that is installed by WBS Chart Pro. To create a WBS chart from an existing Microsoft Project plan:

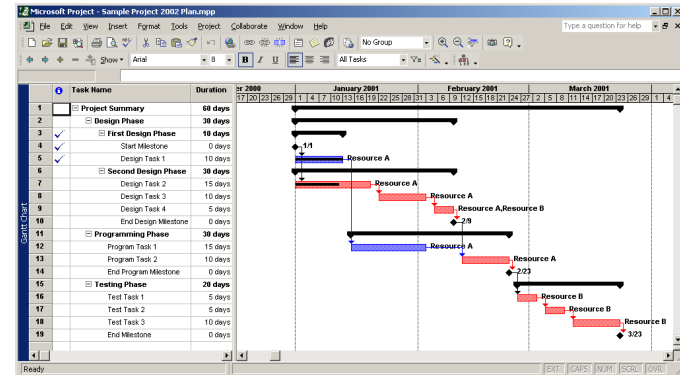
1. Start Microsoft Project.
2. Choose File-Open and locate the file called Sample Project xxx Plan.mpp (where xxx is the version of Microsoft project you are using). This file is located in the folder where you installed WBS Chart Pro (C:\Program Files\WBS Chart Pro by default).
3. Click the WBS Chart Pro toolbar button to create a WBS chart of this Microsoft Project plan.

Note: The WBS Chart Pro toolbar button within Microsoft Project looks like this:

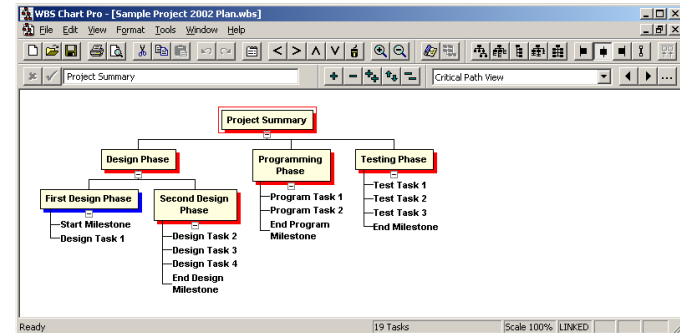


If you do not see this button, refer to the **Troubleshooting Installation Problems** section earlier in this guide.

The plan in Microsoft Project looks something like this:



The corresponding plan in WBS Chart Pro looks like:



The WBS chart is created from the Summary Tasks and Tasks created in Microsoft Project. Summary Tasks are created in Microsoft Project by “Indenting” tasks thus creating a hierarchy of project data.

Summary Tasks in Microsoft Project and in WBS Chart Pro represent the rollup of the information below them.

Doubleclick a Summary Task in the WBS chart to view the rolled up information to each level of the chart.

In the WBS chart, click the – (minus) symbol box below a Summary Task to collapse the detail. Click the + (plus) symbol to expand the detail for a collapsed Summary Task.

Note: The WBS chart is linked dynamically to the existing Microsoft Project plan. This means that any changes you make to the WBS chart in WBS Chart Pro are instantly reflected in Microsoft Project.

Saving the WBS chart also saves the corresponding Microsoft Project plan.

Filtering and collapsing tasks

You can create a WBS chart of a specific part of your Microsoft Project plan by applying a Filter or collapsing Summary Tasks in Microsoft Project **before** you create the WBS chart. To create a WBS chart of a specific subset of tasks in Microsoft Project:

1. In Microsoft Project, apply a filter or click the – (minus) symbol on a Summary Task to hide the detail for a Summary Task.
2. Click the button within Microsoft Project to goto WBS Chart Pro.

Note: Switching to WBS Chart Pro by clicking the Task Bar at the bottom of your screen will not create a WBS chart of the filtered data from Microsoft Project. Use the WBS Chart Pro toolbar button within Microsoft Project to switch to WBS Chart Pro.

Making changes in the WBS chart

When you create a WBS chart from a Microsoft Project plan the WBS chart is dynamically “linked” to the corresponding Microsoft Project plan. Any changes you make in the WBS chart are **instantly reflected** in the Microsoft Project plan. If you click and drag tasks to move them in the WBS chart you are effectively moving them in the Gantt Chart in Microsoft Project. If you doubleclick a task and change Duration, Work, Start, Finish, etc. this will be changed in Microsoft Project.

Saving the WBS chart

When you save a WBS chart that is linked to a Microsoft Project plan the corresponding plan in Microsoft Project is also saved. Saving a WBS chart saves to a *.wbs file type. The .wbs file does not contain any data, it only contains the formatting and a link to the Microsoft Project plan where the data resides.

Opening a saved WBS chart that is linked to a Microsoft Project will open the corresponding Microsoft Project file to display the data in the WBS chart.

You can also open the Microsoft Project file first and click the WBS Chart Pro button within Microsoft Project to go to the saved WBS chart of this plan.

Note: If you send a WBS chart file that was created from a Microsoft Project plan to someone you must also send the corresponding Microsoft Project file.

