

# WBS Schedule Pro

## User's Guide

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## Overview of WBS Schedule Pro

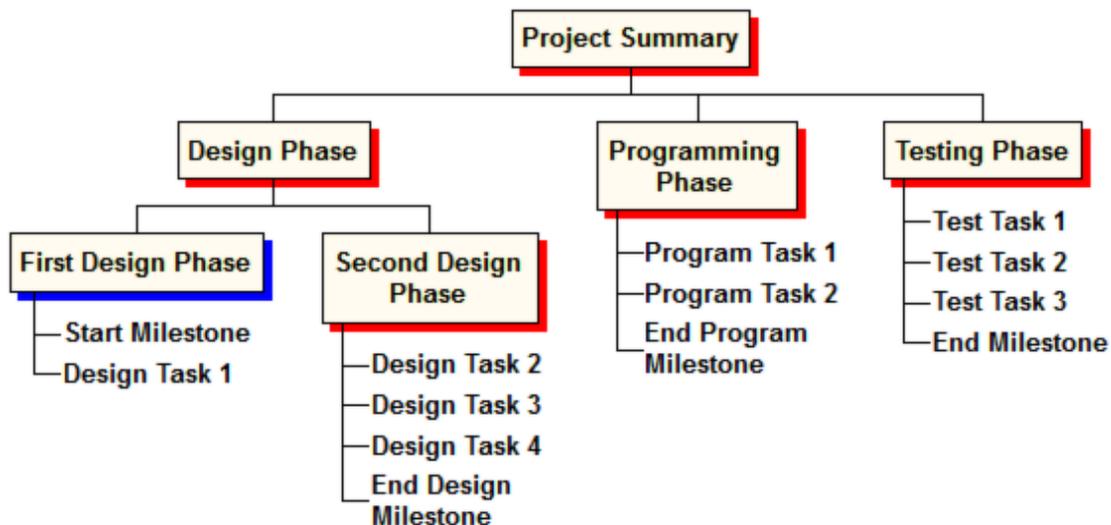
What is WBS Schedule Pro?

WBS Schedule Pro is a Windows-based project management software application used to create, display and manage projects using a WBS (Work Breakdown Structure) Chart, Network Chart, Gantt Chart and Task Sheet.

WBS Schedule Pro can be used for Project Planning and Project Management

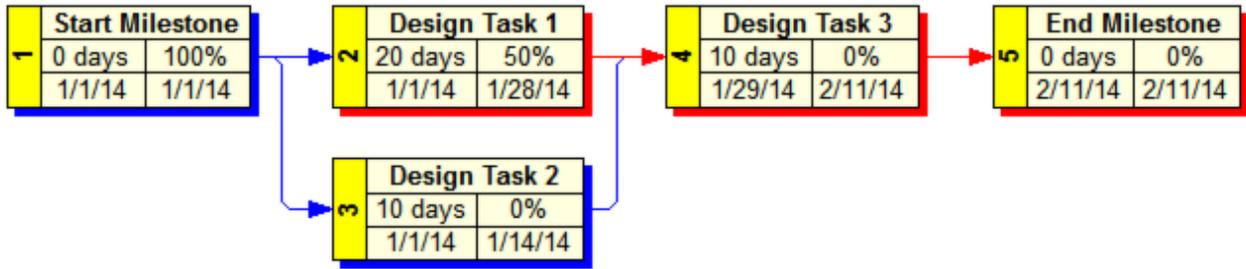
As a planning tool, you can use WBS Schedule Pro to quickly sketch a project plan on the screen using a "Top-Down" approach. In the WBS Chart, define Phases (Summary Tasks) and Subtasks with a click of the mouse. Double-click a Task to add schedule information like Duration, Start Date, Finish Date, Cost, Work, etc... WBS Schedule Pro automatically rolls up the core task data to each summary level of the project.

An example of a WBS Chart is shown here:



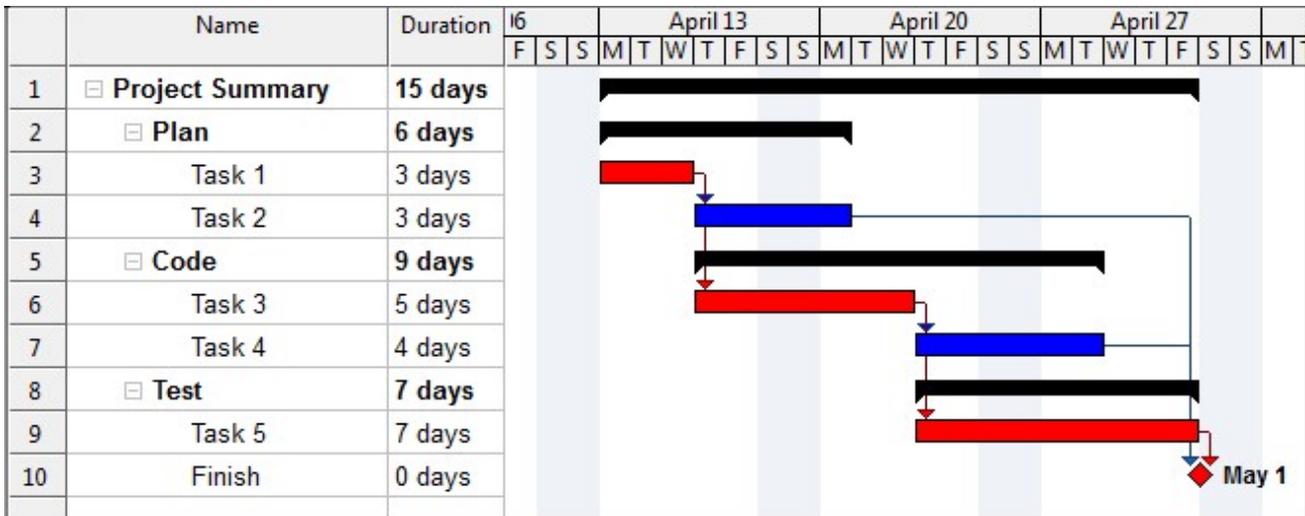
In the Network Chart, define the project's schedule. Link tasks to define the relationships between Tasks and determine the Critical Path.

An example of a Network Chart is shown here:



You can also use the Gantt Chart to create and schedule the project. Create Summary Tasks and Tasks. Link Tasks to create the schedule and Critical Path.

An example of a Gantt Chart is shown here:



Plans can be displayed in a Task Sheet view. An example of a Task Sheet is shown here:

Start Milestone	0d	1/1/2014	1/1/2014
Design Task 2	20d	1/1/2014	1/28/2014
Design Task 1	10d	1/1/2014	1/14/2014
Design Task 3	10d	1/29/2014	2/11/2014
End Milestone	0d	2/11/2014	2/11/2014

Projects created in WBS Schedule Pro can be maintained and managed separately, or transferred to Microsoft Project or any program that can read the Microsoft Project XML file format.

WBS Schedule Pro can be used with Microsoft Project

WBS Schedule Pro can be used to generate WBS, Network and Gantt Charts directly from existing Microsoft Project files. WBS Schedule Pro uses the Outline created in Microsoft Project to generate a hierarchical view of the data. Buttons can be installed

into Microsoft Project for easy transfer of data. As you organize and change your project in Microsoft Project using the outlining features, a WBS, Network or Gantt Chart of that data is only a click away.

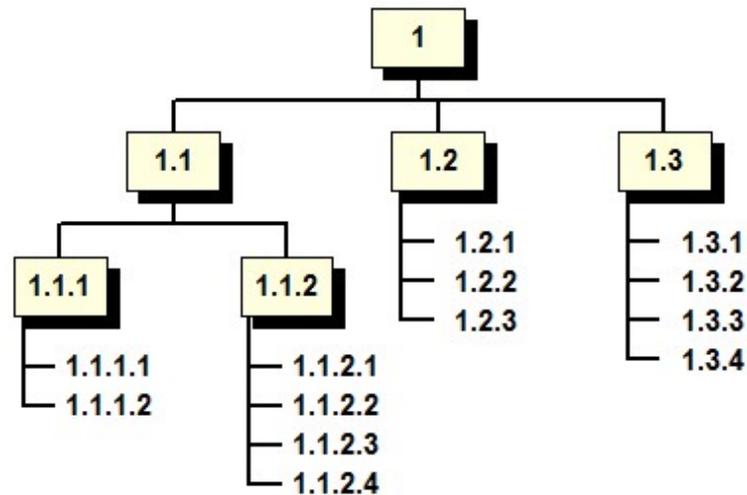
When you create a chart of an existing Microsoft Project plan, all changes made in the chart are immediately reflected in the Microsoft Project plan. You can add/delete/reorganize/update your Microsoft Project plan using WBS Schedule Pro as it contains a seamless integration between the two programs.

Additionally, charts can be created first in WBS Schedule Pro and then transferred directly to Microsoft Project. WBS Schedule Pro can be used as a front-end planning tool for Microsoft Project.

## What is a WBS Chart?

A WBS (Work Breakdown Structure) Chart is a way of organizing a project into varying levels of detail using a hierarchical diagram. The traditional Work Breakdown Structure chart displays varying levels of detail starting with the highest or broadest at the top. Then, each phase or component of the project is defined at subsequent levels until the appropriate level of detail is achieved. The lowest level items in the chart are the Tasks in the project. Those with subordinate items are the Summary Tasks in the project.

WBS codes are used to label and identify the different levels of the hierarchy. Usually, the highest level summary is labeled 1, the second level 1.1, 1.2, 1.3, the third level 1.1.1, 1.1.2, 1.1.3, and so on. The following diagram is an example of WBS codes:



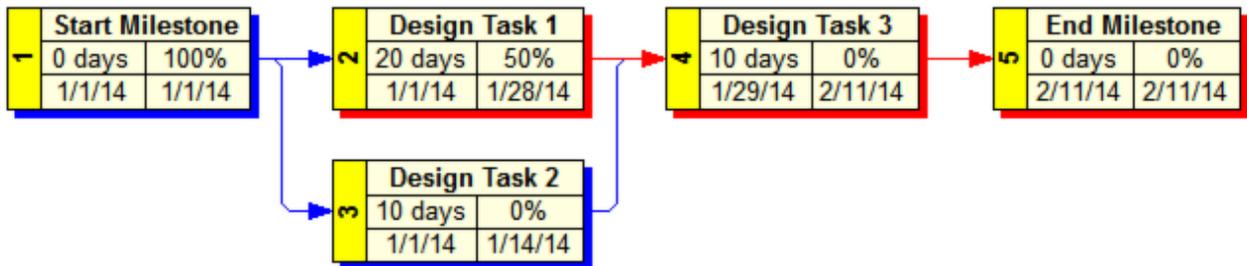
In WBS Schedule Pro, this effect is achieved by creating Summary Tasks and Tasks in the WBS Chart or by "Indenting" Tasks in the Gantt Chart and Task Sheet. By creating a Summary Task you are specifying that the summary is a higher level than the tasks below it and will rollup or "summarize" the information of its subtasks.

For detailed information on how to use the WBS Chart in WBS Schedule Pro, see [Using the WBS Chart](#)

## What is a Network Chart?

A Network Chart (sometimes referred to as a Network Diagram, PERT Chart, Dependency Diagram or Precedence Diagram) is a way of creating and displaying a project by showing tasks as boxes and the dependencies between tasks as lines between these boxes.

The following diagram is an example of a simple Network chart:



A Network Chart is useful for defining the workflow or schedule of the project. By clicking and dragging between the Tasks in the Network Chart, a link is defined between the tasks specifying that one task cannot start until another has finished or that one task cannot start until another has started and worked for a certain number of days. Various links can be defined depending on the relationship that exists between the tasks. By using the Task's Duration and Calendar, the schedule and Critical Path for the project is derived from this information.

The Critical Path (shown in red) in a Network Chart is constantly and dynamically changing based on the links and information you enter. The Critical Path tells you which tasks in the project must be completed on time for the project to be on time. The non-critical tasks (shown in blue) are those that can slip and not affect the project completion. Non-critical tasks have "Slack" which is the amount of time they can slip and not affect the completion of the project.

For detailed information on how to use the Network Chart in WBS Schedule Pro, see [Using the Network Chart](#)





## What's New in WBS Schedule Pro?

For previous users of our WBS Chart Pro and PERT Chart EXPERT software, here is a list of new features in WBS Schedule Pro:

Combined WBS Chart Pro and PERT Chart EXPERT - WBS Schedule Pro combines the features of WBS Chart Pro (for creating WBS charts) and PERT Chart EXPERT (for creating Network charts) plus adds many new and exciting features to make it a complete, full-featured project planning application.

Gantt Charts - WBS Schedule Pro version 5.1 contains a new Gantt Chart feature. The original release of WBS Schedule Pro (5.0) in mid-2014 did not contain Gantt Charts. These were added around the middle of 2015.

New User Interface - WBS Schedule Pro contains an all new user interface complete with dockable Panes (see below) and a new Ribbon instead of a Toolbar. On the Ribbon, common commands can be found on the Home tab, program-wide settings on the View tab, Project-wide settings on the Project tab and to modify settings of the current View, select the Format tab (the options under Format change based on the View you have selected. See [Ribbons, Tabs & Buttons](#)

Tasks Pane, Views Pane and Notes Panes - The three Panes on the left side of the screen make working with your project easier by displaying certain data in addition to the main chart on the screen. The Tasks Pane is a Directory-style listing of Task Names in your project. The Views Pane lists the various Views to display your chart in various styles and the Notes Pane is useful for editing the Notes field in a project. See [Panels](#)

Task Sheet View - Used for displaying data in a Spreadsheet-style view. Customize the Task Sheet by Inserting or Hiding the Columns to display the information you need to see.

Multiple Hierarchies (Grouping) - Display various breakdowns of your project using many different fields. This feature is called Grouping. A "Grouped" WBS chart is a top-down representation of the different levels of a project. A Grouped Network chart displays horizontal bands across the page to represent the various levels of a project. A Grouped Task Sheet uses an Indented list to represent the various levels. See [Groups and Outlining Defined](#)

Support for the Notes field - The Notes field allows you to enter extensive descriptive text for a task. You can access the Notes field by doubleclicking a task, by displaying the Notes field in a Task Sheet or by using the Notes Pane. [See Notes](#)

Annotate WBS and Network Charts - Add free-form Text Boxes to the WBS or Network Charts. This feature is useful for displaying information in a chart that can be placed anywhere in a chart. You can optionally link the Text Box to a task or to multiple tasks. Right-click in the chart or over a task to add the Text Box. See [Adding Text Boxes to a Chart](#)

Create a WBS Dictionary via the MS Word Export - Export a WBS Schedule Pro project to Microsoft Word and merge into a pre-defined WBS Dictionary. Several templates are provided or you can create your own. See [Exporting to Word](#)

Exporting to Excel - Export to Microsoft Excel using the Excel Wizard. Specify the fields you wish to export and the resulting Excel spreadsheet is nicely formatted complete with indenting and grouping. If you have ever exported your MS Project plans to Excel you may have noticed that the Indenting is lost in the Excel file. Exporting WBS Schedule Pro files to Excel maintains the indenting of the tasks and clearly displays Summary Tasks and Tasks with proper indenting. See [Exporting to Excel](#)

Importing from Excel - Import hierarchical data into WBS Schedule Pro from Excel. Use a variety of hierarchical data to create breakdowns of projects or anything that needs to be displayed in a hierarchical format. See [Importing from Excel](#)

Additional ways to Link Tasks - Create links (dependencies between tasks) in any View using a variety of techniques. Use the Link button on the Ribbon to link the selected tasks. Select a group of tasks (Ctrl-click) and select the "One to Many" option to link the active task (with the red box) to the other selected tasks. Select the "Many to One" option to link the selected tasks to the active one. See [Linking Tasks](#)

Multiple task selection - Select multiple tasks in a chart to set certain attributes on all selected tasks at once. See [Multi-Task Editing](#)

Box Style Attributes Combined - Define how tasks are displayed in the chart by combining styles. In prior versions you could define how a Critical Task was displayed or how a task is displayed when the Flag field was set but you could not combine these. Now, for example, you could define that the task's shadow displays the Critical Path information but that the interior color of the task displays using a Flag field. See [Boxes](#)

Date Pickers - Select dates in certain date fields from a drop-down calendar.

Value and Pick Lists - Define value and pick lists for Text and Outline Code fields. See [Fields](#)

Spell Checker - Click the Spell check toolbar button or press F7 to start the Spell check.

Copy Picture - Use the Copy Picture command to paste charts into other applications instead of using Save As Picture. These are a higher quality image than the other available options and are scalable.

Save As Picture to a .EMF file - This scalable format is better for pasting chart images into other applications such as Word or PowerPoint.

More Colors - More Colors available in the color picker in addition to allowing unlimited custom colors.

## Installation and Configuration

### System Requirements

WBS Schedule Pro is a Windows based project planning software application. WBS Schedule Pro can be used as a standalone project planning tool or as an add-on to Microsoft Project.

WBS Schedule Pro system requirements:

Windows Vista, Windows 7, Windows 8 or Windows 10\*  
25 MB free disk space  
Runs on all major Networks

\* WBS Schedule Pro works with Windows XP with the exception of a few minor display issues. Due to the fact that Microsoft has stopped supporting Windows XP, we may not be able to help should issues arise.

WBS Schedule Pro is compatible, and integrates seamlessly, with the following versions of Microsoft Project:

Microsoft Project 98  
Microsoft Project 2000  
Microsoft Project 2002  
Microsoft Project 2003  
Microsoft Project 2007  
Microsoft Project 2010  
Microsoft Project 2013  
Microsoft Project 2016

If you are using a version of Microsoft Project later than the ones listed above, go to our website at [www.criticaltools.com](http://www.criticaltools.com) for information on newer versions of WBS Schedule Pro.

*WBS Schedule Pro does not require Microsoft Project.*

## Installing on a Local Computer

WBS Schedule Pro can be used as a standalone project planning tool or it can be used with Microsoft Project. To install WBS Schedule Pro on a local computer, run the Setup program that was downloaded or run the Setup program contained on the CD. Follow the prompts to complete the setup to your local hard drive.

### For Windows XP computers

Setup installs the program files into the C:\Program Files\WBS Schedule Pro folder by default.

Setup installs the sample files and views and templates into the My Documents\WBS Schedule Pro folder.

### Windows Vista, Windows 7, Windows 8 and Windows 10

Setup installs the program files into the C:\Program Files (x86)\WBS Schedule Pro folder by default.

Setup installs the sample files and views and templates into the My Documents\WBS Schedule Pro folder.

### Using WBS Schedule Pro by itself

The Setup program installs various icons for starting WBS Schedule Pro. Choose one to start the program. The first time you start WBS Schedule Pro it will ask you to Register. If you have purchased the full version of the software, choose Register to begin the Registration process. If you have not purchased the software you can use the software in Demo mode by selecting the Demo option.

After asking to Register the software, WBS Schedule Pro asks if you would like to use the software with Microsoft Project. To use WBS Schedule Pro as a standalone software application if you do not have Microsoft Project, select the option to not configure Microsoft Project. If you want to configure Microsoft Project at a later time you can choose the Microsoft Project drop down list on the Ribbon and select the option to Configure MS Project.

### Using WBS Schedule Pro with Microsoft Project

You can use WBS Schedule Pro with Microsoft Project to create projects that you can transfer to Microsoft Project or to create WBS/Network charts of existing Microsoft Project plans. If you want to integrate WBS Schedule Pro with MS Project, choose the option to do so when prompted when you first start WBS Schedule Pro.

See also:

[Configuring MS Project for use with WBS Schedule Pro](#)

[Installing on a Network](#)

## Installing WBS Schedule Pro on a Network

### WBS Schedule Pro Licensing for Network Use

WBS Schedule Pro utilizes “named user” licensing and not “concurrent user” network licensing. This means that each user who accesses WBS Schedule Pro on a network must have a license. For example, if you have 10 people who need to use the version of WBS Schedule Pro on your network you must have a 10 User Network License. User licenses can be transferred. If a user no longer accesses WBS Schedule Pro on the network they can be replaced by another user.

### Installing WBS Schedule Pro on your Network

1. Install WBS Schedule Pro into a directory on the Network.
2. Assign users access to this folder.
3. The first time a user starts the program it will be in Demo mode until the software is Registered. To Register WBS Schedule Pro click the Register option when a user starts the program and follow the instructions to Register the software.

### Configuring the Network version of Microsoft Project for use with WBS Schedule Pro

If you wish to use WBS Schedule Pro with a network installation of Microsoft Project, refer to the Help topic [Configuring a Network Version of MS Project for WBS Schedule Pro](#)

## Configuring MS Project 98 to Project 2007

The following are instructions for configuring Microsoft Project 98, Project 2000, Project 2002, Project 2003 or Project 2007 for use with WBS Schedule Pro.

WBS Schedule Pro can be accessed from within Microsoft Project through the use of Quick Access Toolbar buttons or buttons on the Ribbon. The WBS, Network and Sheet View buttons look like this:



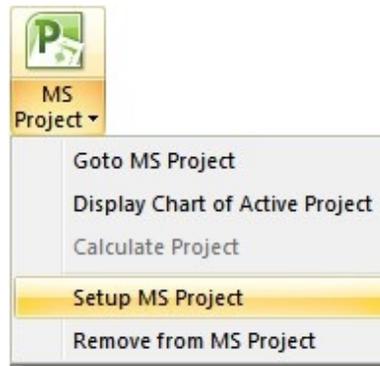
With the WBS Schedule Pro Toolbar buttons you can open a Microsoft Project plan and click a button to create a WBS chart, Network chart or Task Sheet of the current plan. The first time you run WBS Schedule Pro Setup you are prompted to configure Microsoft Project to add these buttons. If you chose to do this and you see the buttons when you start Microsoft Project then you are ready to create charts from your Microsoft Project plans.

If you do not see the WBS Schedule Pro buttons in Microsoft Project, check the following:

1. Are you using Microsoft Project installed on a network? If so, there may not be sufficient rights (Read/Write Permission) to modify Microsoft Project on the network. Therefore, the WBS Schedule Pro Toolbar buttons are not be saved as part of Microsoft Project. See "Configuring a Network Version of MS Project" for more information.
2. Did you answer "No" and "Do not ask me again" when prompted to configure Microsoft Project? If so, follow the instructions below to add the buttons.

### Adding the Buttons to Microsoft Project

1. Start Microsoft Project.
2. Select Tools-Macro-Security...
3. Select Medium and click OK.
4. Start WBS Schedule Pro, select the MS Project drop-down list and select Setup MS Project.



5. You will be asked to configure the version of Project that is open. Click Yes.
6. Switch to MS Project and click Enable Macros when (if) prompted.

This should add the toolbar buttons into MS Project. There may be times when WBS Schedule Pro will not be able to configure MS Project. If the above does not work to configure MS Project, follow the instructions below to manually install the Toolbar.

Manually installing the WBS Schedule Pro Toolbar button into Microsoft Project:

1. Start Microsoft Project.
2. Go to Tools-Options-Security. If you see the option on the bottom of this form that says "Allow loading files with legacy or non default file formats", select it. If not, go to step #3.
3. Click the Macro Security... button. Set it to Medium and click OK and OK again.
4. Choose the File menu and select Open.
5. Open the Folder where you installed WBS Schedule Pro (the default is C:\Program Files (x86)\WBS Schedule Pro).
6. Open the Setup file for the appropriate version of Microsoft Project:

SetupWBS5\_98.mpp if you are using Project 98.

SetupWBS5\_2000.mpp if you are using Project 2000.

SetupWBS5\_2002.mpp if you are using Project 2002.

SetupWBS5\_2003.mpp if you are using Project 2003.

SetupWBS5\_2007.mpp if you are using Project 2007.

These Setup files contain macros that are automatically run when opened (you must choose to Enable Macros if you receive a message). These macros install the appropriate items into Microsoft Project to configure it to work with WBS Schedule

Pro. Once opened, close the Setup file without saving.

If, after closing and reopening Microsoft Project the Toolbar is no longer there then there is a problem saving information to the GLOBAL.MPT file. The Global.mpt file is a Microsoft Project file where the WBS Schedule Pro integration items are stored. You need to obtain Read/Write Permission to modify and save the Global.mpt file.

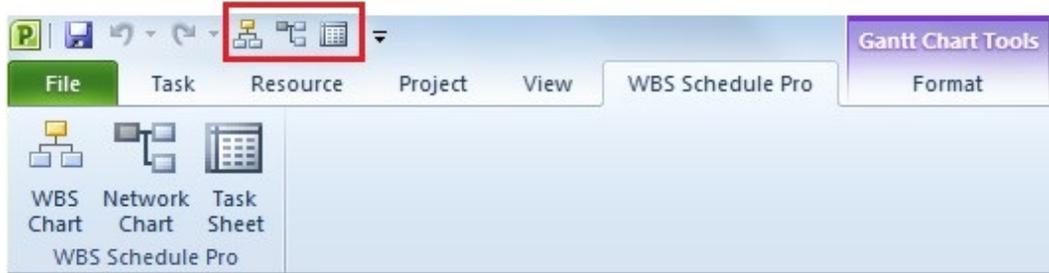
See also:

[Creating WBS charts from Microsoft Project plans](#)

## Configuring MS Project 2010, 2013 and Project 2016

The following are instructions for configuring Microsoft Project 2010, 2013 and 2016 for use with WBS Schedule Pro.

WBS Schedule Pro can be accessed from within Microsoft Project 2010, 2013 and 2016 through the use of Buttons on the Quick Access Toolbar or from buttons within the WBS Schedule Tab.



*The WBS Schedule Pro Quick Access Toolbar buttons (highlighted) and the Buttons in the WBS Schedule Pro tab in MS Project*

With the WBS Schedule Pro buttons you can open a Microsoft Project plan and click a button to create a WBS chart, Network chart or Task Sheet of the current plan. The first time you run WBS Schedule Pro Setup you are prompted to configure Microsoft Project to add these buttons. If you chose to do this and you see the buttons when you start Microsoft Project then you are ready to create charts from your Microsoft Project plans.

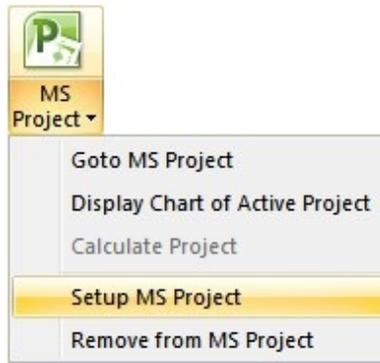
If you do not see the WBS Schedule Pro buttons in Microsoft Project, check the following:

1. Are you using Microsoft Project installed on a network? If so, there may not be sufficient rights (Read/Write Permission) to modify Microsoft Project on the network. Therefore, the WBS Schedule Pro buttons will not be saved as part of Microsoft Project. See "Configuring a Network Version of MS Project" for more information.
2. Did you answer "No" and "Do not ask me again" when prompted to configure Microsoft Project? If so, follow the instructions below to add the buttons.

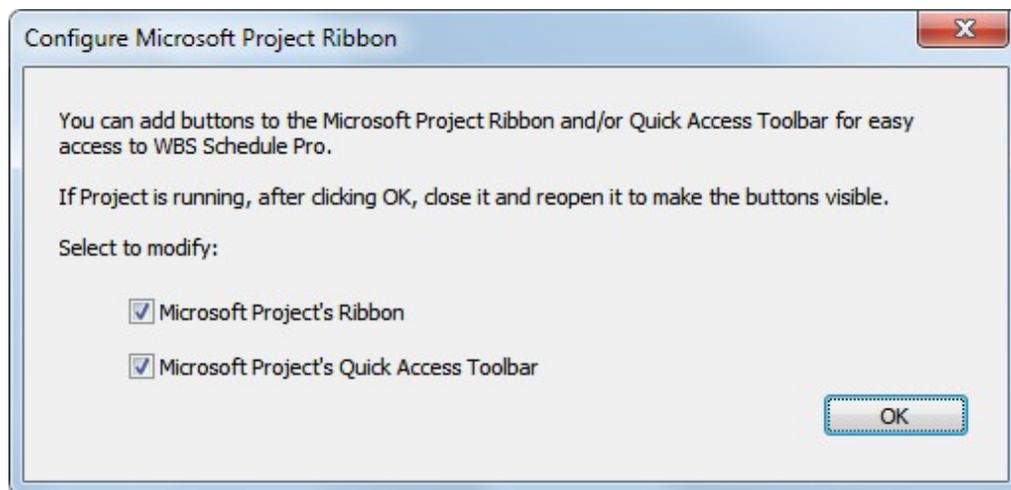
### Adding the Buttons to Microsoft Project

1. Start Microsoft Project.
2. Select File-Options-Trust Center-Trust Center Settings...
3. Select "Disable all macros with notification". Click OK and OK again.

4. Start WBS Schedule Pro, select the MS Project drop-down list and select Setup MS Project.



5. You will be asked to configure the version of Project that is open. Click Yes.
6. Select to add buttons to the Quick Access Toolbar or to a Tab on the Ribbon. Click OK.



7. Switch to MS Project, close it and reopen it to display the buttons.

There may be times when WBS Schedule Pro will not be able to automatically configure MS Project. If the above does not work to configure MS Project, follow the instructions below to manually install the buttons.

Manually installing the WBS Schedule Pro Buttons into Microsoft Project 2010, 2013 or 2016:

1. Start Microsoft Project.
2. Go to File-Options-Trust Center-Trust Center Settings... and select "Disable all macros with notification". Click OK and OK again.

3. Choose the File menu and select Open.
4. Open the Folder where you installed WBS Schedule Pro (the default is C:\Program Files (x86)\WBS Schedule Pro).
5. Open the Setup file for the appropriate version of Microsoft Project:

SetupWBS5\_2010.mpp if you are using Project 2010.

SetupWBS5\_2013.mpp if you are using Project 2013.

SetupWBS5\_2016.mpp if you are using Project 2016.

These Setup files contain macros that are automatically run when opened (select "Enable Macros" if prompted). These macros install the appropriate items into Microsoft Project to configure it to work with WBS Schedule Pro. Once opened, close the Setup file without saving.

The above process does not automatically add the Buttons to Project. You must do this manually.

To add buttons to the Quick Access Toolbar:

1. Start Project, select the drop down arrow in the upper left corner of the screen and select "More Commands..."
2. Select Macros from the drop down list in the left column.
3. Select the GotoWBSChart macro in the left column and then click the Add >> button to copy this to the right column.
4. Select Modify and choose an image for the button.
5. Repeat for the GotoNetworkChart and GotoTaskSheet macros.

Note: You can only choose from the pre-defined list of images.

To add a Tab and Button to the Ribbon in Project 2010, Project 2013 or Project 2016:

1. Start Project, right click on the Ribbon and select "Customize the Ribbon..."
2. Select a Tab in the Main Tabs section in the right column and select the New Tab button. Select this New Tab, click Rename, type WBS Schedule Pro and click OK.
3. Choose Macros from the drop down list in the left column.
4. Select New Group in the right column.
5. Select the GotoWBSChart macro in the left column and then click the Add >> button to copy this to the New Group.

6. Select Rename and choose an image for the button. Note: You can only choose from the pre-defined list of images.
7. Repeat for GotoNetworkChart and GotoTaskSheet.
8. Select New Group and Rename if you wish to rename this group.

See also:

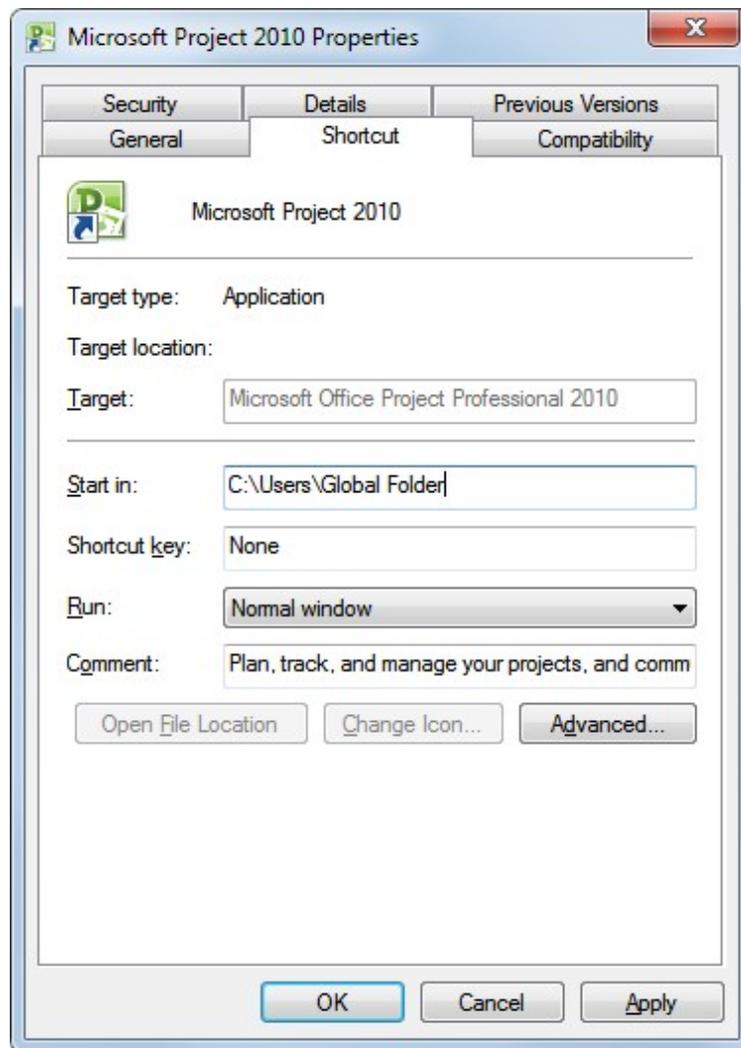
[Creating WBS charts from Microsoft Project plans](#)

## Configuring a Network Version of MS Project

When Microsoft Project is configured for use with WBS Schedule Pro, several items are copied into Microsoft Project and stored in the Global.mpt file. The Global.mpt file is a Microsoft Project file used to store things like Macros, Tables, Views, Toolbar Buttons, etc. If you install Microsoft Project on your local computer the Global.mpt file is accessible to you on your local hard drive but if Microsoft Project is installed on a Network, the Global.mpt may be locked and not accessible for you to modify it.

WBS Schedule Pro requires some items to be copied and stored in the Global.mpt file to allow a seamless integration between the two programs. If you have Microsoft Project installed on a network and don't have sufficient rights (Read/Write Permission) to modify the Global.mpt file, you have three options:

1. Copy the necessary items into Microsoft Project each time you use WBS Schedule Pro. To do this, start Microsoft Project and then start WBS Schedule Pro. In WBS Schedule Pro choose MS Project-Setup MS Project. This copies the necessary Tables, Views, Macros and (if you are using Project 2007 or earlier), a Toolbar button into Microsoft Project. These items will remain there until Microsoft Project is closed.
2. Obtain temporary Read/Write access to the Global.mpt file on the network, and follow the instructions in the previous two sections of Help to configure MS Project. The disadvantage to this procedure is that everyone who uses the version of Microsoft Project on the network will see this WBS Schedule Pro buttons but may not have access to the WBS Schedule Pro program.
3. Create a copy of the Global.mpt file and store it on your local computer. This way, Microsoft Project can be run from the network, but all custom settings (Views, Tables, Macros, Reports, Toolbars, etc...) are stored on the local computer. You can then instruct Microsoft Project to use the Global.mpt on your local computer instead of the one on the network. To do this, copy the Global.mpt file from the network to a local folder. Then, right-click the icon you use to start MS Project, select Properties and enter this location in the Start In field. For example:



## Tips for using WBS Schedule Pro on a Network

### Tips for running WBS Schedule Pro on a Network Server

If WBS Schedule Pro is installed on a Network Server, users can access a single installation of the program. This also means that the Views and Templates within the software are accessed by many individuals. Understanding how this works is an important part of using WBS Schedule Pro in a multi-user environment.

The following explanation assumes that when WBS Schedule Pro is installed on your Network Server the folder containing the software is a Read-Only folder where users cannot modify the files in this folder. This is a typical Network Server Installation. With this in mind, here are some tips for working in this environment.

### Registering

The first time a user runs the software from the Network Server they are prompted to Register. Register the software by using the Purchase Code that was sent after the purchase of the software. At startup, follow the prompts to Register the software using the Purchase Code or if this is not readily available the user can run the software in Demo mode until the Purchase Code is obtained. Then, start WBS Schedule Pro, select the File menu and choose Register.

Registration information is stored in each user's local profile.

### Views and Templates

Views and Templates determine how Charts and Output appear. The various types of Views and Templates are described here:

1. Views (\*.wbv) – These include WBS Charts, Network Charts and Task Sheets and contain formatting options for each of these types of Charts in WBS Schedule Pro.
2. Page Layouts (\*.wbp) – These contains various Header and Footer layouts for WBS and Network Charts.
3. Word Templates (\*.docx and \*.doc) – These are the WBS Dictionary Templates used to export the WBS Dictionary to Microsoft Word.
4. HTML Templates (\*.html) – These include various templates for exporting a project to HTML files.

For Views and Page Layouts, in a typical desktop installation these are automatically updated as you change formatting options in a chart. This allows you to change a style or appearance for a particular View and have these options saved as part of that View in addition to being saved in the project. Each New project will then contain these new options for that View.

With Views and Page Layouts installed on the Network Server, changes made to these are not saved since they are Read-Only. The advantage to this is:

1. You don't have many users changing the Views and potentially overwriting other's changes.
2. You can maintain a standard way of displaying data. You can modify a View in the software, save it to a Read/Write location and then get permissions to copy the file onto the Network Server. Once copied to the Server, it becomes the new default for displaying data. This also applies to the Word and HTML Templates which are configurable but not from within the software.

If you want each user to be able to modify and change the Views and Templates in WBS Schedule Pro, copy the contents of the Views and Templates folder from the Network Server to the My Documents/WBS Schedule Pro/Views and Templates folder on the user's computer.

Then, to make WBS Schedule Pro use the Views and Templates on the Current User's computer:

1. Start WBS Schedule Pro.
2. Select the File menu and choose Options.
3. Click the Browse button next to Views & Templates and select the folder on the User's computer. It will look similar to this:

C:\Users\UserName\Documents\WBS Schedule Pro\Views and Templates

Note: In File-Options, you can also specify whether or not to automatically save changes in Views and Templates by selecting the options under "When closing a chart".

## Text Boxes

TextBox.ctc – This file contains the default formatting for Text Boxes that are added to WBS or Network Charts by right-clicking in a Chart or on a Task. A default TextBox.ctc file is installed into the same folder where the WBS Schedule Pro program (.exe) file is installed.

A user can create their own custom TextBox file by right-clicking on a Text Box and selecting Set Style as Default. This copies a TextBox.ctc file to the current user's My Documents/WBS Schedule Pro folder for individual use.

If you add a Text Box in a WBS or Network Chart the WBS Schedule Pro program first looks to the My Documents/WBS Schedule Pro folder to see if there is a custom TextBox.ctc file and displays using that one. If the TextBox.ctc file does not exist it then it loads the TextBox.ctc file from the Program Folder on the Network.

## Resources

Resources.ctc – This file contains a list of Resources that are loaded in every new project. This file does not exist until a user clicks Set as Default in the Resources form found in the Project tab.

If the Resources.ctc file exists in the My Documents/WBS Schedule Pro folder when a user starts the software it will load this set of Resources into the project. If the Resources.ctc does not exist in the My Documents/WBS Schedule Pro folder but exists in the Program folder on the Network then it loads this set of Resources into new projects.

If there is no Resources.ctc file then the Resource list is empty for all new projects.

## Calendars

Calendar.ctc – This file contains Calendar information and can be used to set standard Working and Nonworking days for all new projects. This file does not exist until a user clicks Set as Default in the Calendar form found in the Project tab.

If the Calendar.ctc file exists in the My Documents/WBS Schedule Pro folder when a user starts the software it will load this Calendar into a new project. If the Calendar.ctc does not exist in the My Documents/WBS Schedule Pro folder but exists in the Program folder on the Network then it loads this Calendar into new projects.

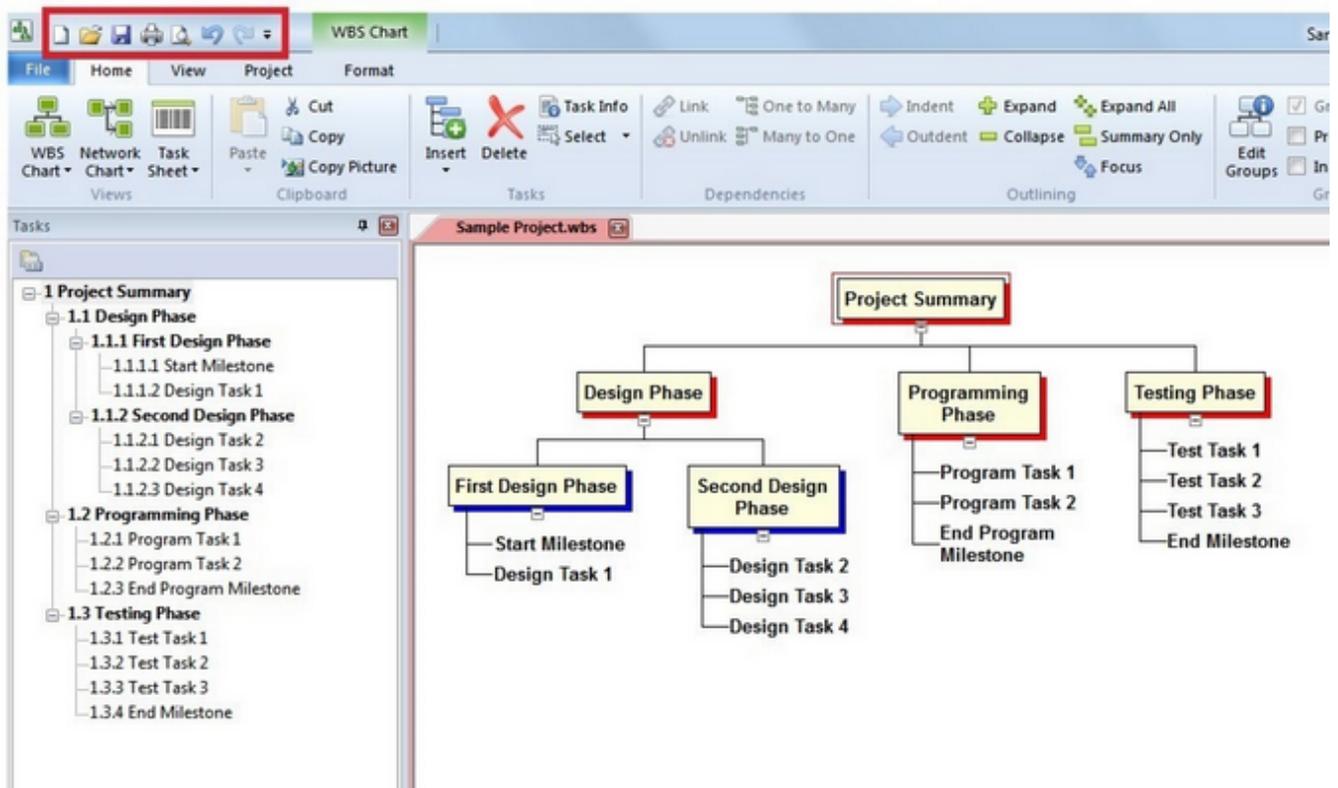
If there is no Calendar.ctc file then the Calendar defaults to a standard 5 day workweek schedule.

## Ribbon and User Interface (Overview)

### Quick Access Toolbar

The Quick Access Toolbar is located in the upper left corner of the WBS Schedule Pro screen and allows you one-click access to certain operations. Click the drop-down arrow to customize what is displayed on this toolbar.

Due to the limited space for the Quick Access Toolbar buttons only a certain number of buttons are allowed so as not to interfere with the chart type listed above the Format menu.



## Status Bar

### Status Bar

The Status Bar is the strip of information located at the bottom of the WBS Schedule Pro screen. The left side of the Status Bar displays messages about current operations. The right side of the Status Bar displays information about the current chart and allows you to perform certain operations.

If you right-click the Status Bar you can see how the Status Bar is configured. Select an option to turn On/Off the indicator.

### Description of the Status Bar operations and indicators

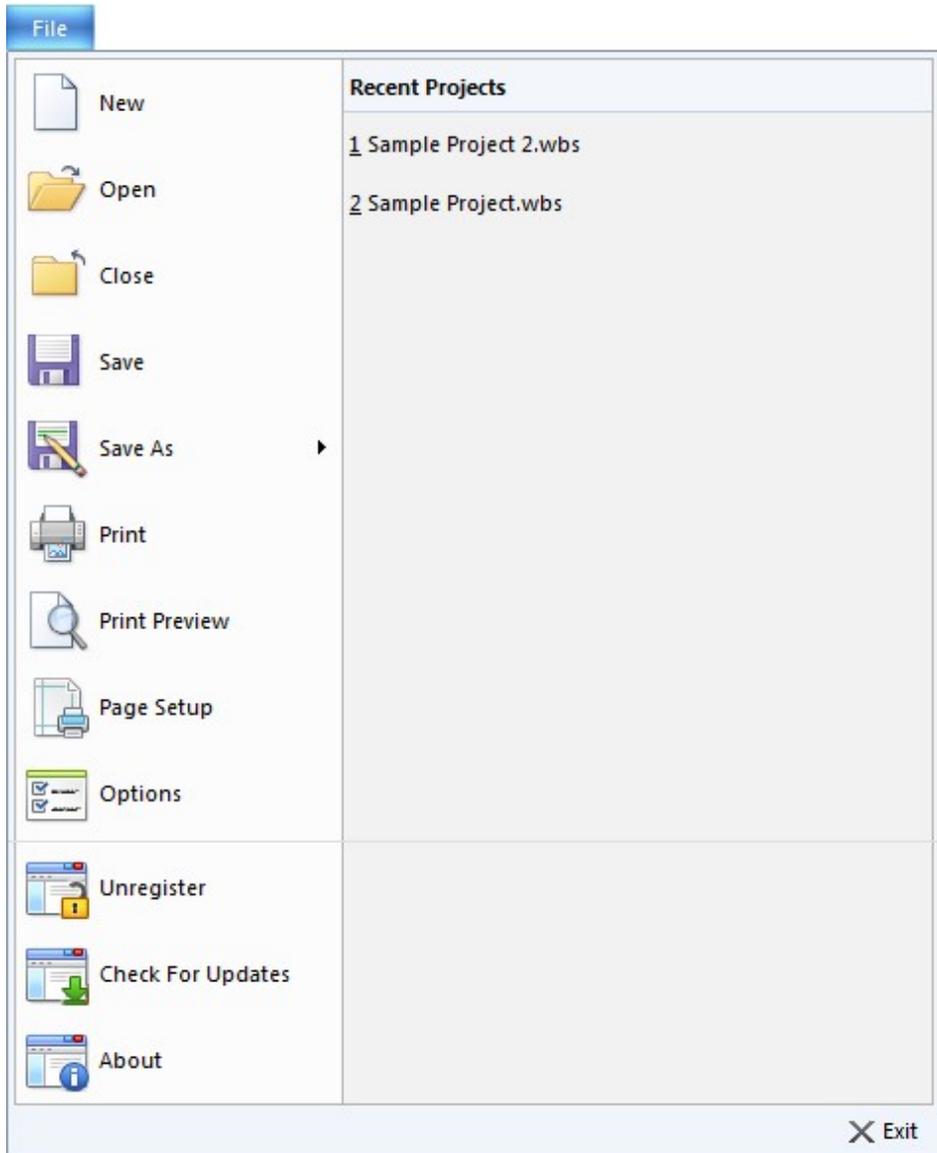
The right side of the Status Bar contains six small box areas that describe the current state of a chart. They are, from left to right:

1. Ready Status - Displays "Ready" when no current operations are being performed on the project.
2. Locked Status - Displays "LOCKED" if the Network chart has manually positioned boxes. When locked, tasks in the Network chart are no longer automatically positioned based on their dependencies. In the Network Chart, choose Format-Auto Layout to automatically position boxes and remove the Locked indicator.
3. Trace Status - Displays "TRACE" if the Network Chart is currently using a Trace to display tasks. The Trace feature displays predecessors and/or successors to a selected task in the Network Chart. In the Network Chart, choose Format and deselect the Trace checkbox to remove the Trace and display all tasks.
4. Linked Status - Displays "LINKED" if the current project is linked to a datasource (such as a Microsoft Project plan, XML or Text file).
5. Item Count - Displays the total number of visible items and hidden items in the current chart. Items include Tasks, Summary Tasks and/or Group Headers that are currently displayed in the chart. Hidden Items include Tasks that are collapsed into Summary Tasks, other Summary Tasks that are collapsed and not visible and Tasks/Summary Tasks that are filtered out in MS Project. In the Network Chart, hidden items include Summary Tasks that are not displayed when the Network is not Grouped.
6. View Selector - Switches to the last used WBS chart, Network chart or Task Sheet.
7. Scale - Displays the current Zoom factor (scale) of the current chart.

8. Zoom Slider - Click to change the Zoom factor of the current chart.

## Ribbon, Tabs & Buttons

### File



New	Opens a blank chart for planning a new project.
Open	Displays the Open dialog box allowing you to open a saved project.
Close	Closes the current project.
Save	Saves the current project. Displays the Save As dialog if the chart has never been saved. Automatically saves (without prompting) to the same name if the file has been previously saved.

Save As	Select the Save As icon to save the project with a new name. Select the arrow next to the Save As icon to display Save As Picture or Save As Web Pages.
Print	Displays the Printer dialog to select certain options before printing.
Print Preview	Displays the project in Print Preview mode. Print Preview uses the currently selected printer and paper size to display the project exactly how it will appear when printed.
Page Setup	Displays the Page Setup dialog to display options for configuring the page.
Options	Specify the default locations for Documents, Views and Layouts, and the Views to use when starting new projects or creating projects from an external data source.
Register/ Unregister	Displays the Registration form for Registering WBS Schedule Pro and turning it into the Full version. If already registered, this changes to Unregister where you can Unregister the software to free up a license.
Check for Updates	Logs on to the Critical Tools Server to check for available updates for the version of WBS Schedule Pro you have installed. If it finds available updates it prompts you to confirm whether you want to install these updates. This feature requires an internet connection.
About	Displays the About box for information on the version of WBS Schedule Pro and Registration information.

Home



**WBS Chart** Select to switch to the last used WBS chart. Select the drop down arrow to choose from the list of WBS charts or to choose more options for creating new, copying, renaming or deleting WBS chart views.

**Network Chart** Select to switch to the last used Network chart. Select the drop down arrow to choose from the list of Network charts or to choose more options for creating new, copying, renaming or deleting Network chart views.

**Gantt Chart** Select to switch to the last used Gantt chart. Select the drop down arrow to choose from the list of Gantt charts or to choose more options for creating new, copying, renaming or deleting Gantt chart views.

**Task Sheet** Select to switch to the last used Task Sheet. Select the drop down arrow to choose from the list of Task Sheets or to choose more options for creating new, copying, renaming or deleting Task Sheet views.

**Paste** Pastes the contents of the Clipboard from cut or copied information.

**Cut** Cuts the selected task/information and places it on the Clipboard.

**Copy** Copies the selected task/information and places it on the Clipboard.

**Copy Picture** Copies the current chart image to the Clipboard for pasting into other applications.

**Insert** Select the icon to Insert a New Task after the currently selected task in the chart. Select the drop down arrow to insert a Task Before, a Summary Task, a Subtask, or a Text Box into the chart.

**Delete** Deletes the currently selected item or items in the chart.

**Task Info** Displays the Task Information dialog box for entering data for the selected task.

**Select** Selects items in the chart based on the criteria in the drop down list.

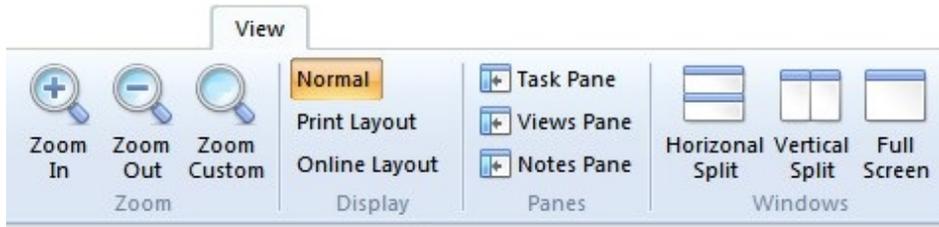
**Scroll to** Scrolls the selected Task into view.

**Link** Creates a dependency between the selected task or tasks.

Unlink	Removes the dependency between the selected task or tasks.
One to Many	Creates a Dependency from the active Task (with the red box around it) to the selected Tasks (the highlighted ones).
Many to One	Creates a dependency from the selected Tasks (the highlighted ones) to the active Task (with the red box around it).
Indent	In the Task Sheet, makes the current Task or Summary Task a Subtask to the one above it.
Outdent	In the Task Sheet, moves the current Task or Summary Task up one outline level.
Expand	Reveals the hidden subtasks of the selected Summary Task in the chart.
Collapse	Hides the subtasks of the selected Summary Task in the chart.
Expand All	Reveals the hidden subtasks for all Summary Tasks in the chart.
Summary Only	Hides all Tasks in the chart and displays only the Summary Tasks.
Focus	Displays only the selected Summary Task and those items below it while hiding the rest of the chart.
Edit Groups	Modify the Grouping (Outlining) of the project.
Grouped	Select to display Groups in a Network Chart. Deselect to remove Grouping in a Network Chart. This option is only available in Network Charts.
Project Summary	Aligns the selected Summary Task at the Left edge of the tasks being summarized.
Independent	When selected, the current View uses the project-wide Grouping as defined in Edit Groups. Deselect to make the current View's Grouping independent from the project-wide Grouping.
Find	Find specified text in the project and Replace if desired.
Goto	Search for and goto the specified task.
Spell	Starts the Spell Checker. Select the drop down arrow to configure the Spell Checker settings.
MS Project	Switches to Microsoft Project. If the current WBS Schedule Pro chart is a "standalone" chart (has never been transferred to Microsoft Project) then this button transfers the data in the current chart to Microsoft Project for further scheduling. The data is then stored in Microsoft Project and the chart is "linked" to this Microsoft Project plan.

If the current chart is linked to an open Microsoft Project plan then this button switches to that plan in Microsoft Project.

## View



Zoom In	Increases the size of the chart on the screen. You can also Zoom In using the Zoom Slider in the lower right corner of the screen.
Zoom Out	Decreases the size of the chart on the screen. You can also Zoom Out using the Zoom Slider in the lower right corner of the screen.
Zoom Custom	Displays the Zoom dialog box for adjusting the chart to specific or custom factors. You can also display the Zoom dialog by selecting the Zoom factor displayed in the lower right corner of the screen.
Normal	Displays the chart in a regular window without page breaks or other output indicators.
Print Layout	Displays the chart in a window with page breaks as they would appear if printed. Page breaks are displayed based on the currently selected printer.
Online Layout	Displays the chart in a window with page breaks as they would appear if saved as HTML (File-Save As-Save As Web Pages). Page breaks are displayed based on the size of the image specified in the template used to create the Web Pages.
Task Pane	Displays the Task Pane. This is useful if the Task Pane was hidden by selecting the X on the Pane.
Views Pane	Displays the Views Pane. This is useful if the Views Pane was hidden by selecting the X on the Pane.
Notes Pane	Displays the Notes Pane. This is useful if the Notes Pane was hidden by selecting the X on the Pane.
Horizontal Split	Splits the screen Horizontally.
Vertical Split	Splits the screen Vertically.
Full Screen	Restores any split screens to one full screen.



## Project



Options	Displays the Options dialog for changing File Locations, project Settings, properties and Viewer options.
Unlink	Removes the link to the current datasource, copies the data into the .wbs file and makes the current WBS Schedule Pro a standalone project.
Excel	Starts the Excel Wizard for exporting the current WBS Schedule Pro project to Microsoft Excel. Requires Excel 2003 or greater.
Word	Starts the Word Wizard for exporting the current WBS Schedule Pro project to Microsoft Word. Requires Word 2003 or greater.
Resources	Displays the Resources form for defining a list of resources for the project.
Calendar	Defines the workdays, hours in a workday and non- working days for your project. The Calendar option is not available when linked to a MS Project plan.
Baseline	Change and update the Baseline information in the current project. The Baseline option is not available when linked to a MS Project plan.
WBS Codes	Create and Edit the WBS Codes in the Project.
Fields	Displays the Customize Fields dialog for setting Field Titles and creating Value Lists for fields.
Undo	Removes the last command performed in WBS Schedule Pro.
Redo	Reverses the action of the Undo command.

## Format (WBS Chart)



Fields	Displays options for modifying the fields that are displayed within the Summary Task and Task boxes in the WBS Chart.
Lines	Displays options for formatting the lines in the WBS Chart.
Boxes	Displays options for modifying how Summary Task and Task boxes appear in the WBS Chart.
Overall Style	Sets the chart-wide default style for the way boxes are arranged in the WBS Chart.
Orientation	Sets the chart-wide default orientation of boxes in the WBS Chart.
Between Summaries	Changes the default distance between the Summary Tasks in the WBS Chart.
Between Tasks	Changes the default distance between the Tasks in the WBS Chart.
To Subtasks	Changes the default distance between Summary Tasks and Tasks in the WBS Chart.
Org Chart Style	Changes the way the immediate subordinates are displayed below the selected Summary Task. This button displays all items directly below the selected Summary Task horizontally (like an Org chart).
WBS Chart Style	Changes the way the immediate subordinates are displayed below the selected Summary Task. This button displays Tasks vertically and other Summary Tasks horizontally below the selected Summary Task.
List All Style	Changes the way the immediate subordinates are displayed below the selected Summary Task. This button displays all items directly below the selected Summary Task vertically below the Summary Task.
WBS Style 2 Columns	Changes the way the immediate subordinates are displayed below the selected Summary Task. This button displays Tasks vertically in two columns below the selected Summary Task and other Summary Tasks below horizontally.
List All Style	Changes the way the immediate subordinates are displayed below

2 Columns	the selected Summary Task. This button displays all items vertically in two columns below the selected Summary Task. This button works best if the selected Summary Task contains only tasks below it and not other Summary Tasks.
Reset	Resets Custom Box Positions, Arrangements and/or Custom Box Styles.
Left	Aligns the selected Summary Task at the Left edge of the tasks being summarized.
Center	Aligns the selected Summary Task over the Center of the tasks being summarized.
Right	Aligns the selected Summary Task at the Right edge of the tasks being summarized.
Align	Select to align the Summary Task over the nearest Task below it.
Align Boxes	Lines up all of the selected boxes. By <b>selecting multiple tasks</b> in the WBS chart and choosing the Align Boxes button you can line up all of these Tasks to be even with the currently selected Task.
Height	Select options for matching the Height of boxes in the chart.
Width	Select options for matching the Height of boxes in the chart.
Outline Symbols	Turns the Outline Symbols on and off.
Hyperlink Symbols	Turns Hyperlink Symbols On or Off.
Progress Marks	Turns the Progress Marks On or Off.

## Format (Network Chart)



Fields	Opens a blank WBS chart for planning a new project.
Link Lines	Displays options for formatting the dependency lines.
Boxes	Displays options for modifying how Task boxes appear.
Group Headers	Displays options for modifying the Group Headers.
Arrange	Sets the chart-wide default style for the way boxes are arranged.
Rows	Click to increase or decrease the spacing between rows in the chart.
Columns	Click to increase or decrease the spacing between columns in the chart.
Timescale	Turns the Timescale On or Off.
Format Timescale	Displays options for formatting the Timescale.
Trace	Turns Trace On or Off.
Trace Options	Displays options for formatting Trace.
Locked	Displays whether the Network Chart is Locked or Unlocked.
Auto Layout	Select to Automatically Layout or automatically position tasks in the Network Chart if Locked.
Layout Selected	Select to automatically position the selected tasks in the chart.
Insert Row	Adds a blank row above the current task.
Insert Column	Add a blank column to the left of the current task.
Match Height	Makes all boxes in the chart equal in height to the tallest box.

Match Width	Makes all boxes in the chart equal in width to the widest box.
Hyperlink Symbols	Turns Hyperlink symbols On or Off.
Progress Marks	Turns the Progress Marks On or Off.

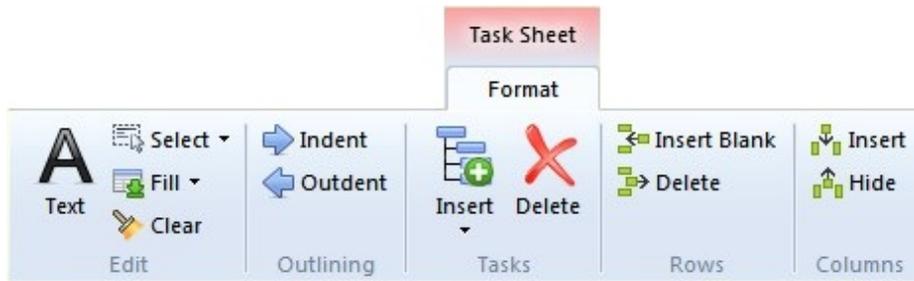
## Format (Gantt Chart)



Bar Style	Change the style of Bar and Shapes for Summary Tasks, Tasks and Milestones in the Gantt Chart.
Bar Text	Change the text that appears next to or within the Gantt Bars and Shapes.
Text	Change Text styles based on Critical Path, Flags or Progress in the Task Sheet.
Select	Selects items in the chart based on the criteria in the drop down list.
Fill	Copies the contents of the selected (active) cell into other highlighted cells below (Fill-Down) or above (Fill-Up).
Clear Text	Clears the contents of the selected (highlighted) cells.
Insert	Select the icon to Insert a New Task after the currently selected task. Select the drop down arrow to insert a Task Before (above), a Summary Task or a Subtask.
Delete	Deletes the selected Row or Rows in the Task Sheet. This will delete blank rows and rows that contain task data. If the Row contains Task data this information will be deleted.
Indent	Makes the current Task (or Tasks) a Subtask (or Subtasks) to the one above it.
Outdent	Moves the current Task or Summary Task up one outline level.
Gridlines	Change the various Gridlines that appear in the Gantt Chart.
Timescale	Change the Timescale associated with the Gantt Chart.
Layout	Change how Links appear, how progress is displayed and other options in the Gantt Chart.
Insert Blank	Inserts a blank row into the Task Sheet.

Delete	Deletes the selected Row or Rows in the Task Sheet. This will delete blank rows and rows that contain task data. If the Row contains Task data this information will be deleted.
Insert	Inserts a Column to the left of the currently selected Column in the Task Sheet.
Hide	Removes the currently selected Column or Columns from the Task Sheet. This does not delete any of the data within the selected column(s).
Progress Marks	Select to turn on/off the Progress Marks displayed in the Gantt Bars. Progress Marks are defined in the Layout menu.

## Format (Task Sheet)



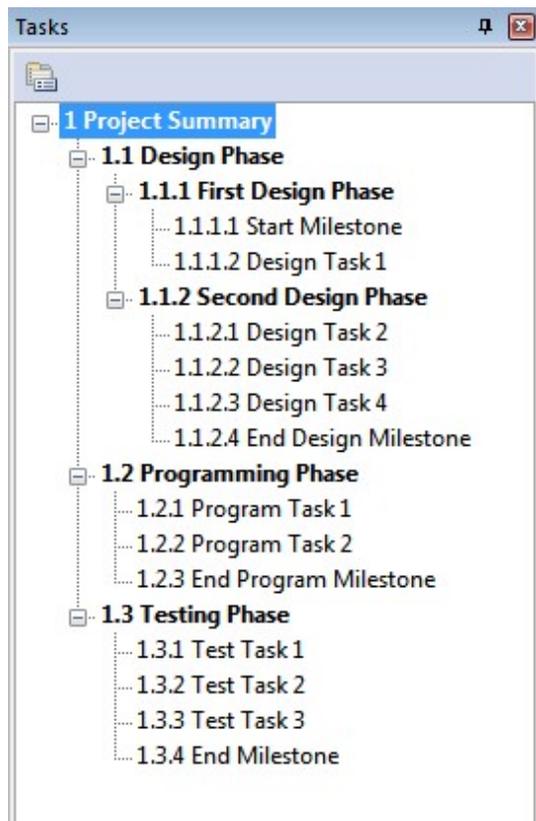
Text	Change Text styles based on Critical Path, Flags or Progress in the Task Sheet.
Select	Selects items in the chart based on the criteria in the drop down list.
Fill	Copies the contents of the selected (active) cell into other highlighted cells below (Fill-Down) or above (Fill-Up).
Clear	Clears the contents of the selected (highlighted) cells.
Indent	Makes the current Task (or Tasks) a Subtask (or Subtasks) to the one above it.
Outdent	Moves the current Task or Summary Task up one outline level.
Insert	Select the icon to Insert a New Task after the currently selected task. Select the drop down arrow to insert a Task Before (above), a Summary Task or a Subtask.
Delete	Deletes the selected Row or Rows in the Task Sheet. This will delete blank rows and rows that contain task data. If the Row contains Task data this information will be deleted.
Insert Blank	Inserts a blank row into the Task Sheet.
Delete	Deletes the selected Row or Rows in the Task Sheet. This will delete blank rows and rows that contain task data. If the Row contains Task data this information will be deleted.
Insert	Inserts a Column to the left of the currently selected Column in the Task Sheet.
Hide	Removes the currently selected Column or Columns from the Task Sheet. This does not delete any of the data within the selected column(s).

## Panes

### Tasks Pane

#### Tasks

Displays all of the Summary Tasks and Tasks in the project. Selecting a Task in this list also selects it in the chart. By default the WBS code is listed next to the Task name. Click the button in the upper left corner of the Tasks Pane to show the Full Codes, Short Code (the last or right-most value of the code) or No Codes preceding the Task Names.



### Some tips for working with Panes

When Panes share space, select the tab of the Pane you wish to view.

Click the tab of the desired Pane and drag it to the middle of the chart to make it "float".

Click a floating Pane's title bar and drag it back over the other tabs to make it part of the same group of Panes.

Click the Auto Hide (Push Pin) icon to dock the pane against the side or bottom of

the chart. Hover over the hidden tabs to quickly display the Pane. Click the Push Pin to anchor it again so it is always visible.

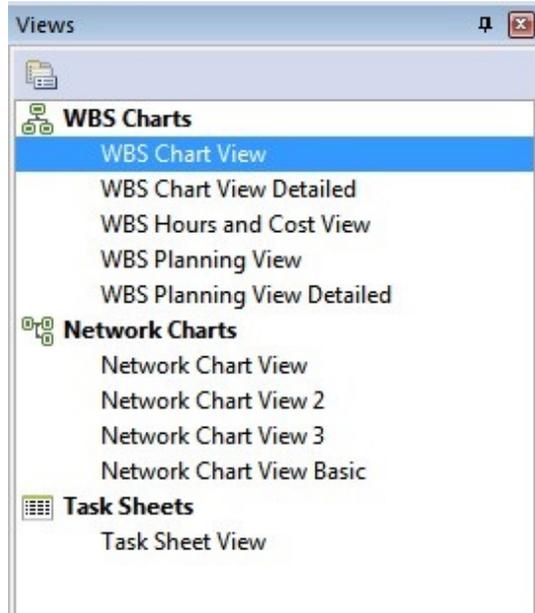
Click the title bar of a Pane and drag it over the displayed screen location to "dock" it at that location.

If you hide a Pane using the X, go to the View tab on the Ribbon and select the Pane you wish to view.

## Views Pane

### Views

Displays all of the WBS Chart, Network Chart and Task Sheet Views in the project. Select a View from this list to display the project using this View.



### Some tips for working with Panes

When Panes share space, select the tab of the Pane you wish to view.

Click the tab of the desired Pane and drag it to the middle of the chart to make it "float".

Click a floating Pane's title bar and drag it back over the other tabs to make it part of the same group of Panes.

Click the Auto Hide (Push Pin) icon to dock the pane against the side or bottom of the chart. Hover over the hidden tabs to quickly display the Pane. Click the Push Pin to anchor it again so it is always visible.

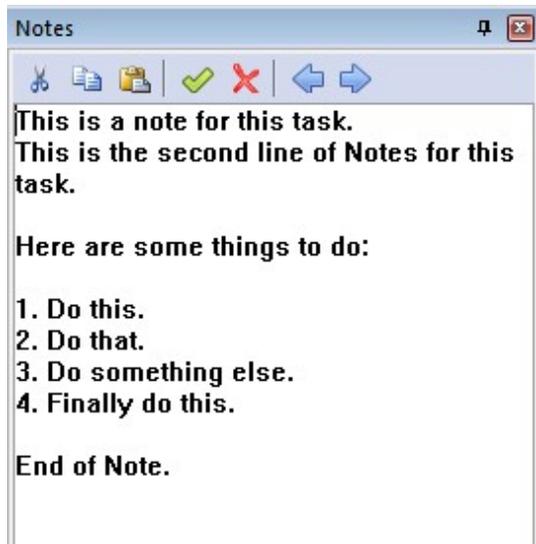
Click the title bar of a Pane and drag it over the displayed screen location to "dock" it at that location.

If you hide a Pane using the X, go to the View tab on the Ribbon and select the Pane you wish to view.

## Notes Pane

### Notes

Displays the Notes for the selected Summary Task or Task in the project. Notes are handy for entering extensive descriptions for a task. Notes entered in WBS Schedule Pro can be transferred to MS Project. Notes from MS Project can also be displayed in WBS Schedule Pro, however, Notes from MS Project are read-only in WBS Schedule Pro and cannot be edited\*.



### Some tips for working with Panes

When Panes share space, select the tab of the Pane you wish to view.

Click the tab of the desired Pane and drag it to the middle of the chart to make it "float".

Click a floating Pane's title bar and drag it back over the other tabs to make it part of the same group of Panes.

Click the Auto Hide (Push Pin) icon to dock the pane against the side or bottom of the chart. Hover over the hidden tabs to quickly display the Pane. Click the Push Pin to anchor it again so it is always visible.

Click the title bar of a Pane and drag it over the displayed screen location to "dock" it at that location.

If you hide a Pane using the X, go to the View tab on the Ribbon and select the Pane you wish to view.

\* See [Adding Notes to a Task](#) for an explanation.

## Using WBS Schedule Pro

### Using the WBS Chart

#### Planning Projects using the WBS Chart

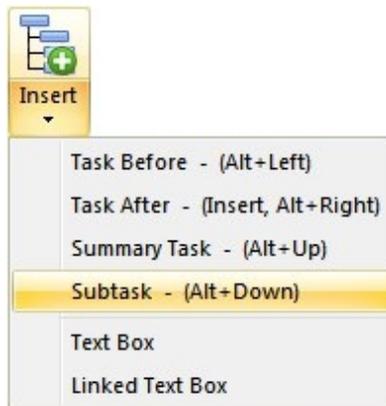
Using the WBS Chart is a great way to start creating a project. In a WBS Chart you break down the phases of your project into various levels of detail starting with the broadest levels at the top and working your way down to the lowest levels of detail at the bottom. Break the project down into "Phases", or Summary Tasks as they are called in WBS Schedule Pro, and then to the lowest levels of detail called Tasks

A Task is the work to be done and a Summary Task is the Rollup of this work to the various levels of the project.

When you first start WBS Schedule Pro, by default, you are placed in a blank WBS Chart to start the planning process.

#### Creating Tasks in a WBS Chart

In a WBS Chart you add tasks in your project by clicking the Insert button on the Home tab of the Ribbon.



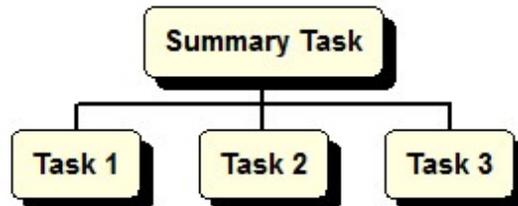
*The Insert button contains a drop down list for adding Tasks and Text Boxes in the chart*

You can also use the Alt-Arrow keys on your keyboard to add tasks. This is a much quicker way to add Tasks and Summary Tasks in the project. Hold the Alt Key down on your keyboard and then press the Left, Right, Up or Down arrow to create a new task to the Left, Right, Above or Below the currently selected task.

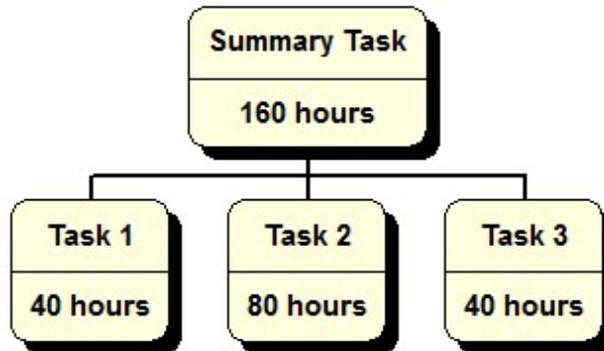
Yet another way to add Tasks is to Right-Click on a Summary Task or Task and choose an Insert command from the popup menu to add a new task relative to the currently selected task.

## Creating Summary Tasks and Tasks

As you create a WBS chart you place certain tasks under other tasks to represent that one is a subordinate of another. In WBS Schedule Pro, any task with at least one task beneath it is referred to as a Summary Task. Any task without a subordinate is simply called a Task.

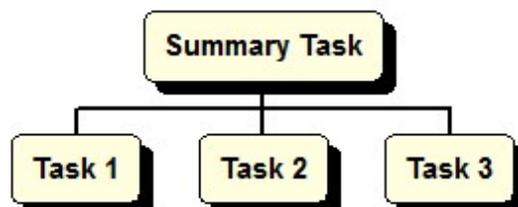


WBS Schedule Pro automatically rolls up certain core Task data to each Summary Task in the project. Each Summary Task summarizes the task information below it all the way up to the top of the WBS Chart. The fields that are rolled up include Cost, Work, Start and Finish dates, and other schedule data. Additionally, you can define custom fields and other data fields to be rolled up (select Fields from the Project tab to customize fields).



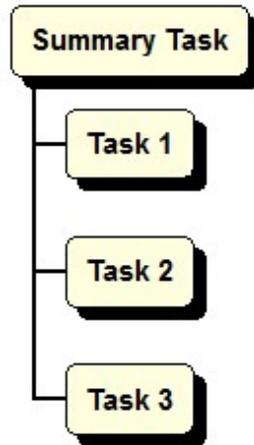
## Recommended way to break down Tasks

When breaking down your tasks, make sure to use the proper technique. When entering Subtasks to a Summary Task you can have the Tasks listed left-to-right, like this:

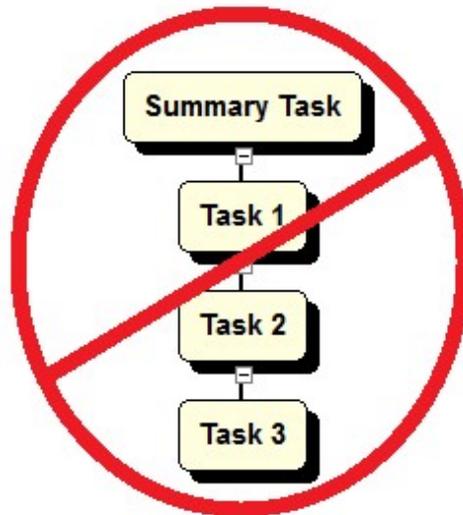


In some views or using the List All feature, the Subtasks are listed vertically under

their respective Summary Task. This is still correct but simply displaying the Tasks vertically instead of horizontally under their Summary Task. Like this:



However, be careful not to do this:



Doing this makes Summary Tasks out of Task 1 and Task 2. The only real Task is the bottom one, Task 3. This is not the correct way to structure a project and should be avoided.

### Entering Information

To enter the name of a Summary Task or Task select that box and type. To enter additional information for the Summary Task or Task, doubleclick it. Doubleclicking displays the Task Information form where you can enter detailed information.

Task Information (ID: 2)

General Custom Flags Hyperlink Notes

Name:  
Task 1

Duration: 5d % Complete: 0% WBS: 2

Work: 40h Cost: \$0.00

Start: 04/30/2015 8:00 AM Finish: 05/06/2015 5:00 PM

Constraint Type: As Soon As Possible Constraint Date:

Resource Names: Resources >>

OK Cancel Help

When displaying the Information form for a Summary Task, many fields will be grayed out. This is because these fields are the calculated rollup of information to the Summary Task.

Summary Task Information (ID: 1)

General Custom Flags Hyperlink Notes

Name:  
Summary Task

Duration: 15d % Complete: 0% WBS: 1

Work: 40h Cost: \$0.00

Start: 04/30/2015 8:00 AM Finish: 05/20/2015 5:00 PM

Constraint Type: As Soon As Possible Constraint Date:

Resource Names: Resources >>

OK Cancel Help

The Rolled up information for a Summary Task is calculated as follows:

Start - The earliest Start date of this Summary Task's Subtasks.

Finish - The latest Finish date of this Summary Task's Subtasks.

Duration - The number of workdays from the Start of the Summary Task to the Finish of the Summary Task. It is not the total of all the Duration amounts for the Subtasks but a count of the workdays for the span of the Summary Task. Use the Work field to roll up a total amount of work for the Tasks in the project.

Work - The total Work for the Subtasks of this Summary Task.

Cost - The total Cost of the Subtasks.

% Complete - The % Complete of a Summary Tasks is the Sum the Actual Durations of its Subtasks divided by the Sum of the Durations of its Subtasks.

#### Additional features for working with WBS Charts

Moving Tasks - Move a Task by clicking a box and dragging it over another box. Little red arrows indicate where the task will be moved relative to the task you are hovering over. Drag Tasks or Summary Tasks. For more on this, see [Moving and Repositioning Tasks in a WBS Chart](#)

Working with Views - A View is a collection of formatting options for each chart

type. When in a WBS Chart View, the Format tab has many options for configuring how the WBS Chart is displayed. This includes default spacing between boxes, the default arrangement of tasks, which fields are displayed in the boxes, etc. Use the Views Pane to select a View that suits your needs. Modify a View by selecting the options in the Format tab. For more information on Views, see [Working with Views](#)

Arranging Fields in Boxes - You can change which fields are displayed in the WBS Chart boxes on the screen by selecting the Format tab and then Fields. Change the arrangement of Summary Tasks and Tasks separately using the Fields form. For more information on Fields, see [Displaying Fields in Task Boxes](#)

Modifying Box Styles - Define the shadow color, fill color and box shapes of items in the WBS Chart by selecting the Format tab and then Boxes. Color items in the WBS Chart based on certain criteria such as Critical Path, Level, Progress or by using the Flag fields. For more information on changing Box Styles, see [Boxes](#)

## Using the Network Chart

### Using the Network Chart

The Network Chart is useful for linking Tasks and for creating the schedule of the project. Tasks can be created in the Network Chart but not Summary Tasks. You can only create Summary Tasks by using the WBS Chart, Gantt Chart or Task Sheet. However, you can display Summary Tasks in the Network Chart and this is a very useful feature for viewing the Tasks in a project organized by the levels you created in the WBS Chart, Gantt Chart or Task Sheet.

The power of the Network Chart is the ability to easily create links between tasks to show the flow of work required in the project.

### Scheduling using the Network Chart

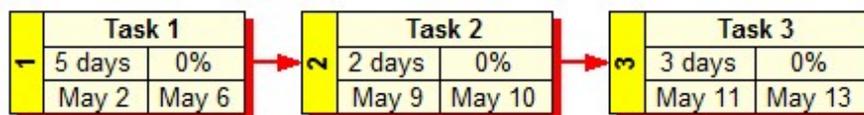
To "Link" Tasks means to create a dependency between two or more Tasks. When two Tasks are linked, the first Task drives the schedule of the second Task. In the case of two linked Tasks, the first Task is called the Predecessor and the second Task the Successor. Changes in the Predecessor's schedule impacts the Successor's schedule.

There are several ways to Link Tasks using the Network Chart. They are:

**Link Button** - Select two or more Tasks in the Network Chart and click the Link button on the Home Tab. This creates a Finish-to-Start dependency between all selected tasks. The order of the links is based on the Task ID from lowest to highest.

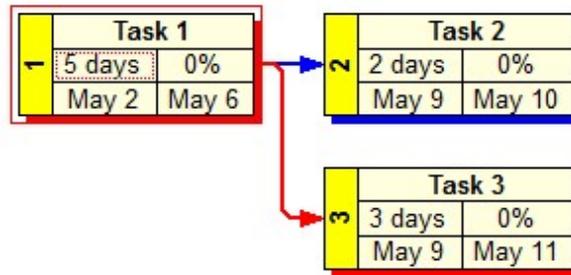


**Click and Drag between two Tasks** - Click from the middle portion of one Task, drag the cursor, place it over another Task and let go. This creates a link between the two Tasks. This is the quickest way to Link to Tasks. This creates a Finish-to-Start dependency between the two and you will instantly see the second Task schedule to occur after the first Task.

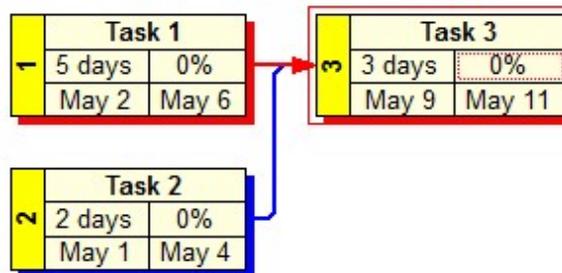


Click and Drag from a Task to white space - If you click from the middle of a Task and drag to white space in the Network Chart this will create a New Task that is linked to the first Task you had selected.

One to Many Link - If you select more than two Tasks and click the One to Many Link on the Ribbon it will create a link from the Current Task (with the Red box around it) to any number of Tasks. This is a quick way to specify that one Task links to many. Use the Ctrl key on your keyboard to select any number of Tasks in the Network Chart.



Many to One Link - If you select more than two Tasks and click the Many to One Link on the Ribbon it will create a link from these Tasks to the Current Task (with the Red box around it). This is a quick way to specify that many Tasks link to one. Use the Ctrl key on your keyboard to select any number of Tasks in the Network Chart.



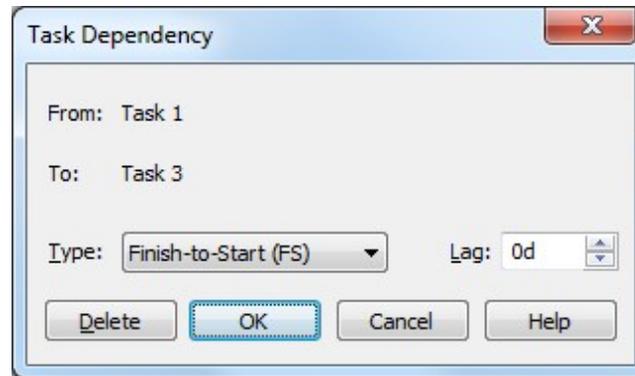
To Unlink Tasks, select any number of Tasks in the Network Chart and click the Unlink button.

### Defining other types of Links and Modifying Links

Creating a link using one of the methods above always creates a Finish-to-Start Link meaning that the Predecessor must Finish before the Successor can start. If the Predecessor ends on a Thursday the Successor will start on Friday, if the Predecessor ends on a Friday the Successor will start on Monday, etc.

There are other types of Links that you can define to represent different relationships plus you can add Lag to offset Tasks.

To Modify a Link, doubleclick the Link line that exists between any two Tasks to display the Task Dependency form.



Use this form to change the type of Link and add Lag (positive or negative).

Finish-to-Start (FS) - This means that the Finish of the Predecessor Task determines the Start of the Successor Task.

Start-to-Start (SS) - The Start of the Predecessor Task determines the Start of the Successor Task. This type of dependency frequently contains a Lag to schedule the Successor Task to Start a certain amount of time after the Start of the Predecessor. A Start-to-Start Link with a Lag of 2 days would schedule the Successor Task to Start 2 days after the Start of the Predecessor Task.

Finish-to-Finish (FF) - The Finish of the Predecessor Task determines the Finish of the Successor Task. This type of dependency frequently contains a Lag to schedule the Successor Task to Finish a certain amount of time after the Finish of the Predecessor. A Finish-to-Finish Link with a Lag of 2 days would schedule the Successor Task to Finish 2 days after the Finish of the Predecessor Task.

Start-to-Finish (SF) - The Start of the Predecessor Task determines the Finish of the Successor Task.

Lag - Use the Lag field to enter an amount of time to offset the successor Task. A Lag can be positive or negative. A Lag can also be entered as a Percentage. Examples of Lag and the meaning with various Link Types are:

Finish-to-Start with 2 Day Lag - The Successor Task will start 2 days after the finish of its Predecessor.

Finish-to-Start with -2 Day Lag - The Successor Task will start 2 days before the finish of its predecessor.

Start-to-Start with 2 Day Lag - The Successor Task will start 2 days after the start of its predecessor.

Start-to-Start with 50% Lag - The Successor Task will start halfway through the predecessor Task.

Finish-to-Finish with -2 Day Lag - The Successor Task will finish 2 days before the finish of its predecessor.

#### Additional features for working with Network Charts

Grouped - The Network Chart is the only View where you can remove the Grouping or Summary Tasks to display a chart with only Tasks. For more information on the Grouped feature, see [Grouped](#)

Displaying a Timescale - Display a Timescale across the top or bottom of the Network Chart to show Tasks that Start or Finish within that time frame. For more information on Timescales, see [Timescale](#)

Tracing Tasks - Trace the dependencies from a selected Task backwards or Forward through the schedule to see all Tasks that lead up to or follow a certain Task. For more information on Tracing Tasks, see [Trace](#)

## Using the Gantt Chart

### Using the Gantt Chart

The Gantt Chart is a useful tool for adding & modifying Tasks, creating the structure by Indenting/Outdenting to define Summary Tasks and for linking Tasks in a project.

### About the Gantt Chart Window

The Gantt View consists of a Task Sheet area on the left side and a Timescale/Gantt Bar area on the right. The Task Sheet area and Gantt Bar area are not two separate windows but one with the Gantt Bars simply the right-most column.

In the Task Sheet area you can Insert and modify the Fields that are displayed by Right-clicking a column header. Click and drag the separator bar between Column Headers to adjust the width of the column. Right-click the Header to modify the field and right-click the column separator bar to "Best Fit" the data.

The Task Sheet can have any number of fields displayed. The Gantt Bar area always occupies the remaining area of the screen to the right of the Task Sheet. The Gantt Timescale can be scrolled left and right to view specific dates in the project.

Doubleclick the Timescale to modify it. Right-click in the Gantt Bar area to change settings specific to this area.

### Adding Tasks, Milestones and Creating Summary Tasks

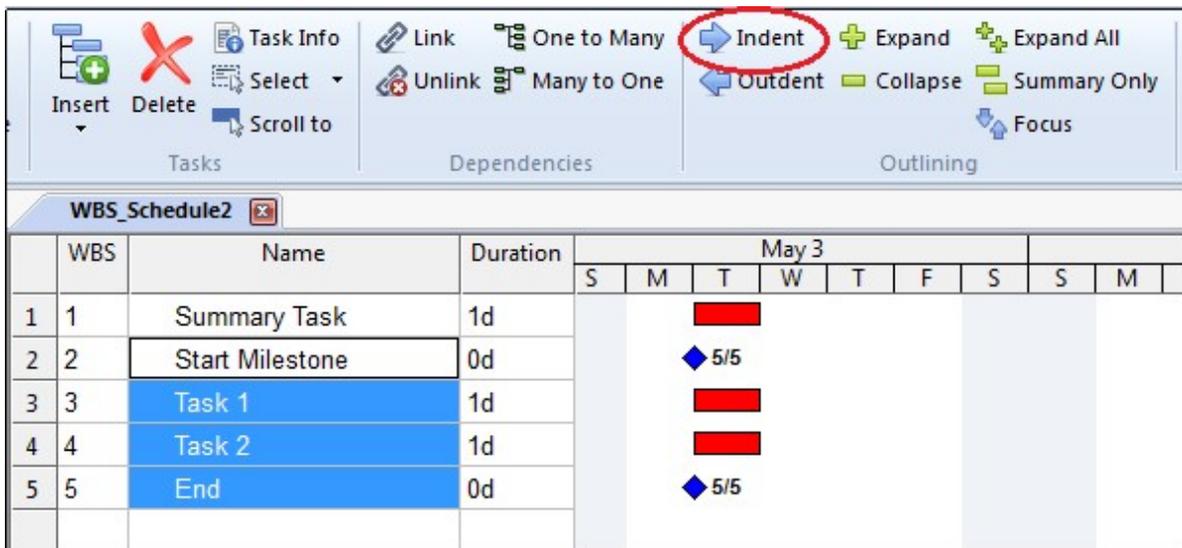
Tasks - Add Tasks in the Gantt Chart by entering information into the Sheet area (left side) of the chart.

	WBS	Name	Duration	May 3			
				S	M	T	W
1	1	Summary Task	1d			■	
2	2	Start Milestone	0d		◆ 5/5		
3	3	Task 1	1d			■	
4	4	Task 2	1d			■	
5	5	End	0d		◆ 5/5		

By default, adding an item by typing into the Sheet area will create a Task.

Milestones - To change a Task into a Milestone, enter a 0 into the Duration column. By definition, a Milestone takes no time and has no Duration. By default, Milestones appear as a diamonds in the Gantt Bar area.

Summary Tasks - To create a Summary Task, highlight a set of Subtasks and click the Indent button on the Ribbon.



	WBS	Name	Duration	May 3			
				S	M	T	W
1	1	☐ Summary Task	1d			■	
2	1.1	Start Milestone	0d		◆ 5/5		
3	1.2	Task 1	1d			■	
4	1.3	Task 2	1d			■	
5	1.4	End	0d		◆ 5/5		

You can also right-click on an item in the Sheet area and select a specific Insert command or click the Insert drop-down arrow on the Home tab to add a specific type of task.

### Scheduling using the Gantt Chart

To "Link" Tasks means to create a dependency between two or more Tasks. When two Tasks are linked, the first Task drives the schedule of the second Task. In the case of two linked Tasks, the first Task is called the Predecessor and the second Task the Successor. Changes in the Predecessor's schedule impacts the Successor's schedule.

There are several ways to Link Tasks using the Gantt Chart. They are:

Link Button - Select two or more Tasks in the Gantt Chart and click the Link button on the Home Tab. This creates a Finish-to-Start dependency between all selected tasks. The order of the links is based on the Task ID from lowest to

highest.

3	1.2	Task 1	1d	
4	1.3	Task 2	1d	



Click and Drag between two Tasks - Click from the middle portion of a Task bar, drag the cursor, place it over another Task bar and let go. This creates a link between the two Tasks. This is the quickest way to Link to Tasks. This creates a Finish-to-Start dependency between the two and you will instantly see the second Task schedule to occur after the first Task.

One to Many Link - If you select more than two Tasks and click the One to Many Link on the Ribbon it will create a link from the Current Task (with the Red box around it) to any number of Tasks. This is a quick way to specify that one Task links to many. Use the Ctrl key on your keyboard to select any number of Tasks in the Network Chart.

Task 1	1d	
Task 2	1d	
Task 3	1d	

Many to One Link - If you select more than two Tasks and click the Many to One Link on the Ribbon it will create a link from these Tasks to the Current Task (with the Red box around it). This is a quick way to specify that many Tasks link to one. Use the Ctrl key on your keyboard to select any number of Tasks in the Network Chart.

Task 1	1d	
Task 2	1d	
Task 3	1d	

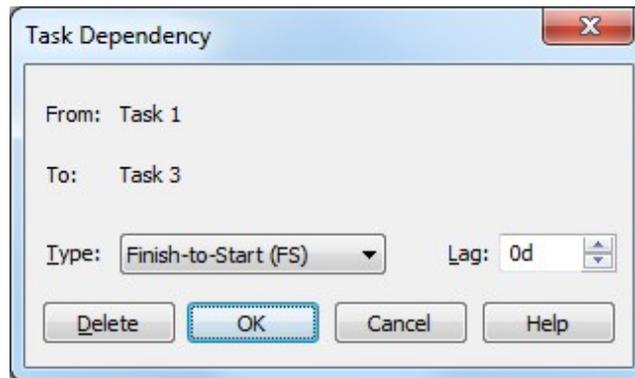
To Unlink Tasks, select any number of Tasks in the Network Chart and click the Unlink button.

### Defining other types of Links and Modifying Links

Creating a link using one of the methods above always creates a Finish-to-Start Link meaning that the Predecessor must Finish before the Successor can start. If the Predecessor ends on a Thursday the Successor will start on Friday, if the Predecessor ends on a Friday the Successor will start on Monday, etc.

There are other types of Links that you can define to represent different relationships plus you can add Lag to offset Tasks.

To Modify a Link, doubleclick the Link line that exists between any two Tasks to display the Task Dependency form.



Use this form to change the type of Link and add Lag (positive or negative). The different types of links are described below followed by various ways to use Lag.

Finish-to-Start (FS) - This means that the Finish of the Predecessor Task determines the Start of the Successor Task. Like this:

Name	Duration	May 4						
		Sun	Mon	Tue	Wed	Thu	Fri	Sat
Task 1	2 days		█					
Task 2	3 days				█			

Start-to-Start (SS) - The Start of the Predecessor Task determines the Start of the Successor Task. This type of dependency frequently contains a Lag to schedule the Successor Task to Start a certain amount of time after the Start of the Predecessor. A Start-to-Start Link with a Lag of 1 day would schedule the Successor Task to Start 1 day after the Start of the Predecessor Task. Like this:

Name	Duration	May 4				
		Sun	Mon	Tue	Wed	Fri
Task 1	2 days		█			
Task 2	3 days			█		

Finish-to-Finish (FF) - The Finish of the Predecessor Task determines the Finish of the Successor Task. This type of dependency frequently contains a Lag to schedule the Successor Task to Finish a certain amount of time after the Finish of the Predecessor. A Finish-to-Finish Link with a Lag of 2 days would schedule the Successor Task to Finish 2 days after the Finish of the Predecessor Task. This pulls the start date of the Successor up to start at a time when it will finish 2 days after the Predecessor. Here is an example:

Name	Duration	May 4						
		Sun	Mon	Tue	Wed	Thu	Fri	
Task 1	2 days		█					
Task 2	3 days			█				

Start-to-Finish (SF) - The Start of the Predecessor Task determines the Finish of the Successor Task. Changing the Start date of the Predecessor changes the Finish of the Successor. Like this:

Name	Duration	May 4						
		Sun	Mon	Tue	Wed	Thu	Fri	
Task 1	2 days					█		
Task 2	3 days		█					

Lag - Use the Lag field to enter an amount of time to offset the successor Task. A Lag can be positive or negative. A Lag can also be entered as a Percentage. Examples of Lag and the meaning with various Link Types are:

Finish-to-Start with 2 Day Lag - The Successor Task will start 2 days after the finish of its Predecessor.

Finish-to-Start with -2 Day Lag - The Successor Task will start 2 days before the finish of its predecessor.

Start-to-Start with 2 Day Lag - The Successor Task will start 2 days after the start of its predecessor.

Start-to-Start with 50% Lag - The Successor Task will start halfway through the predecessor Task.

Finish-to-Finish with -2 Day Lag - The Successor Task will finish 2 days before the finish of its predecessor.

### Additional features for working with Gantt Charts

Bar Styles - Gantt Chart bars for Tasks, Summary Tasks and Milestones can be many different shapes, sizes and colors. You can even define additional bars to display data such as Baseline, Slack, Early and Late Schedules, etc. For more

information on defining these styles, see [Bar Styles](#)

Modifying the Timescale - The Timescale across the top of the Gantt Bar area can be modified to show a wide variety of dates and formats. For details, see [Timescale](#)

Bar Text - Text can be placed next to or within a Task, Summary Task or Milestone Bar to display data in the Gantt Bar area for each bar type. For information on adding this text, see [Bar Text](#)

## Using the Task Sheet

The Task Sheet is useful for modifying data in a spreadsheet style grid.

	WBS	Name	Duration	Start	Finish
1	1	☐ Summary Task	9d	May 13	May 25
2	1.1	Task 1	2d	May 13	May 14
3	1.2	Task 2	3d	May 15	May 19
4	1.3	Task 3	4d	May 20	May 25
5	1.4	End Milestone	0d	May 25	May 25

Inserting Columns - Right-Click a column header and select Insert Column... to create a new column to the left of the selected column.

Moving Columns - Click a column header and drag it over another column header to move it.

Removing Columns - Right-Click a column header and select Hide Column to remove the column from the Task Sheet. This does not delete the data from the column it only removes the column from the Task Sheet.

Formatting Column Data - Right-Click a column header and select Column Definition... to configure the data within that column. Here is an example of the Column Definition for the Start field.

Field - Select the Field drop down list to change the field that is displayed in the current column.

Title - Enter text to appear in the column header. If Title is blank then the Field name appears in the column header. This only changes this column Title for the current Task Sheet. To change the Title of a field project-wide, select the Project tab and select Fields. This form allows you to customize a Field Title globally.

Format - Select from various format options depending on the type of Field displayed in the column.

Align Title - Aligns the Title left, center or right in the column header.

Align Data - Aligns the data in the column left, center or right in the column.

Width - Adjust the width to a specific unit by entering a number of using the up or down arrows.

Wrap - Select if you want the field to Wrap within the column if there is more text displayed for the current width of the column.

Best Fit - Select to automatically adjust the width of the column to be as wide as the widest data in the column.

Tip: Doubleclick separator between two column headers to Best Fit the column.

Tip #2: Doubleclick the column header to quickly go to the Column Definition.

### Adding Tasks, Summary Tasks and Milestones in the Task Sheet

To add a Task in the Task Sheet, just click on a Row and enter information. You can also right-click an existing Task and select one of the Insert options (or click the Insert button on the Home tab).

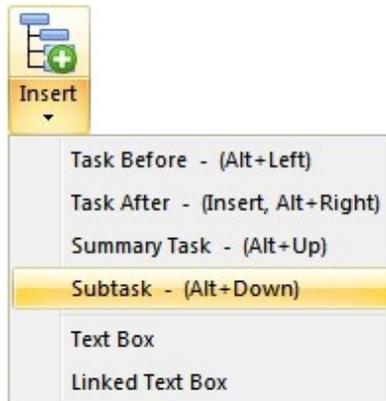
To create a Summary Task, select a Task or Tasks below what you want to become a Summary Task and click the Indent button on the Home tab or the Format tab.

To create a Milestone, change the Duration of any Task to 0 (zero).

## Creating Tasks

### Creating Tasks

Add tasks in a project by clicking the Insert button on the Home tab of the Ribbon.



*The Insert button contains a drop down list for adding Tasks and Text Boxes in the chart*

Tip: In a WBS Chart, add tasks using the Alt-Arrow keys on your keyboard. Press Alt-Down to add a Task as a Subtask to the current one, Alt-Right to add a Task after the current one, etc.

Tip: In a Network Chart, click within a Task and drag to white space to add a new task dependent on the first one.

Tip: In a Gantt Chart or Task Sheet, type in a Row to add a Task and use the Indent/Outdent buttons to create Summary Tasks.

For information on creating tasks and projects using a WBS Chart, see [Using the WBS Chart](#)

For information on creating tasks and projects using a Network Chart, see [Using the Network Chart](#)

For information on creating tasks and projects using a Gantt Chart, see [Using the Gantt Chart](#)

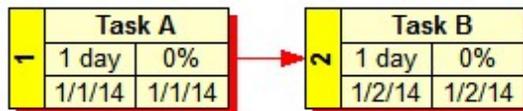
For information on creating tasks and projects using a Task Sheet, see [Using the Task Sheet](#)

## Linking Tasks/Creating Dependencies

A Link is a relationship that you define between two or more tasks. To specify that the tasks in a project occur in a certain order, you create dependencies or "link" tasks. A dependency/link specifies that one task must follow another task in some way (eg: Start after another Finishes or Start 5 days after another Starts, etc...). Linking tasks determines the overall schedule of a project and is key to creating the Critical Path in a project.

### Predecessors and Successors

The first task of two dependent tasks is considered the Predecessor and the second the Successor. In the following example, Task A is a Predecessor to Task B. Conversely, Task B is a Successor to Task A.



### Linking Tasks in WBS Schedule Pro

You can create links in any of the Views in WBS Schedule Pro.

**WBS Chart** - Create links in the WBS Chart by selecting any number of Tasks and clicking the Link buttons on the Home tab. In a WBS Chart there is no way to graphically display links or dependencies. Use the Network Chart or Gantt Chart for this.

**Network Chart** - Create links in the Network Chart by clicking and dragging between Tasks or by selecting Tasks and clicking the Link buttons. For more on Linking using Network Charts, see [Using the Network Chart](#)

**Gantt Chart** - Create links in the Gantt Chart by clicking and dragging between Tasks in the Gantt Bar area or by selecting Tasks in the Sheet area and clicking the Link buttons. For more on Linking using Gantt Charts, see [Using the Gantt Chart](#)

**Task Sheet** - Create links in the Task Sheet by selecting any number of Tasks and clicking the Link buttons on the Home tab. In a Task Sheet there is no way to graphically display links or dependencies. Use the Network Chart or Gantt Chart for this.

## Scheduling

WBS Schedule Pro schedules tasks based on the information you enter. It uses the Project Start Date (or Project Finish Date when scheduling from the Project Finish), Duration, Dependencies and Constraints to calculate when each task must Start and Finish. WBS Schedule Pro also calculates the Critical Path. Below is an explanation of how tasks are scheduled.

Tasks are scheduled based on the following:

By Project Start Date – If a task does not have a dependency, a Constraint Date or an Actual Start then the task is scheduled to start on the Project Start Date and its finish is determined by the Duration of the task.

By Duration – Each task's finish date is determined by the Start Date plus the Duration, taking into account the Calendar (working and non-working days, hours per day, etc.).

By Dependencies – If a task has a dependency but does not have a Constraint Date or Actual Start then the task is scheduled based on the dependency.

By Constraint Date – If a task has a Constraint Date then it schedules the task based on the Constraint Date and Constraint Type.

By Actual Start/Finish – If a task has an Actual Start or Actual Finish it is scheduled based on these dates.

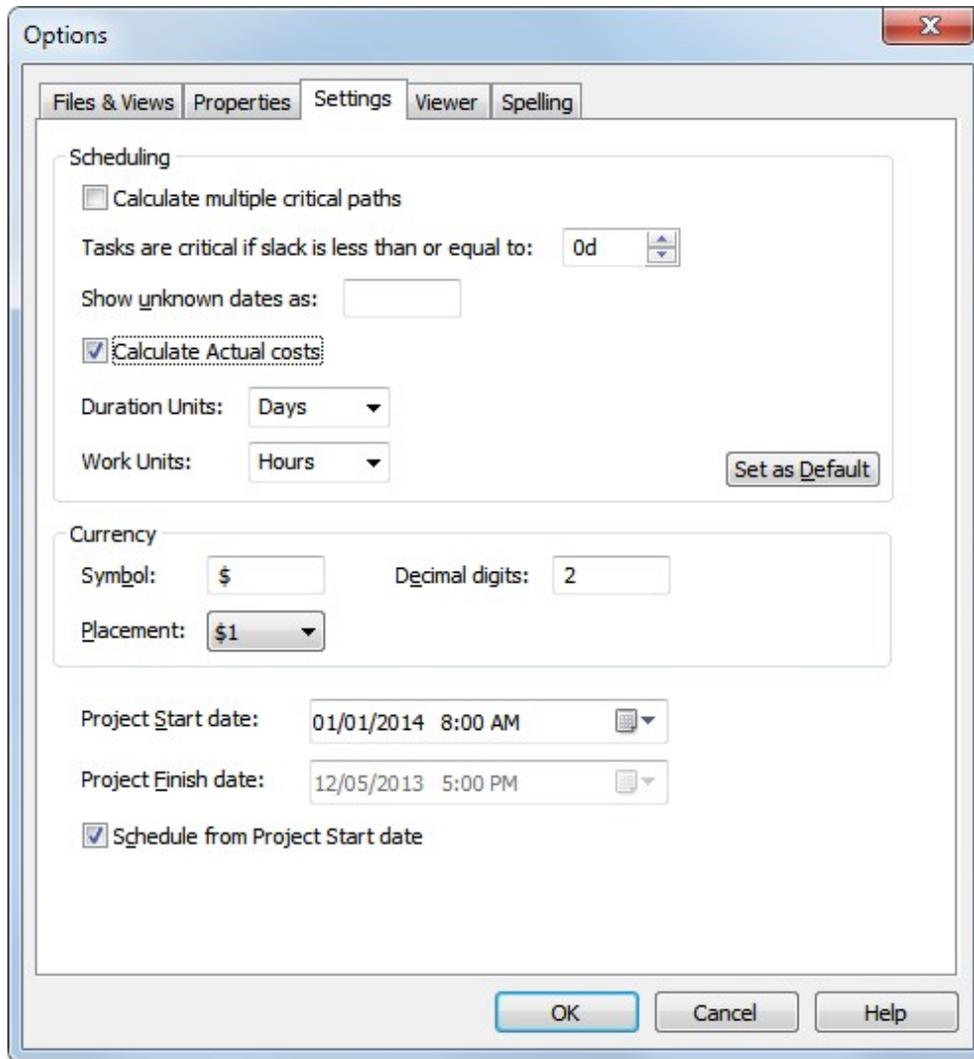
Each of these concepts is explained below:

### Project Start Date and Project Finish Date

The Project Start Date in WBS Schedule Pro is more than just the date on which the project starts. The Project Start Date is used to define the Start date for all tasks that do not have dependencies, Constraint Dates or an Actual Start.

By default, the Project Start Date is set to the current date when you open a New file. To change the Project Start Date use the Properties form:

1. Select the File menu and choose Option and then Settings.
2. Select Schedule from Project Start date.
3. Enter a date into the Project Start date field.



To schedule from the Finish of the project, deselect the Schedule from Project Start date option and enter a date into the Project Finish date.

## Duration

The duration is the amount of time it takes to complete a task. Duration for a task can be entered in Minutes, Hours, Days, Weeks, or Months. Duration can be entered into the Duration field of the Task Information dialog box using the following format:

M = Minutes  
 H = Hours  
 D = Days  
 W = Weeks  
 MO = Months

For example, for a 10 day task you enter 10d in the duration field, a 2 week task

would be 2w.

When scheduling from the start of the project the duration is used to calculate the Finish date of a task. When scheduling from the finish of the project the duration is used to calculate the Start date of a task.

Note: The above durations take into account the Calendar (Project-Calendar) when calculating Finish dates. By default, WBS Schedule Pro provides a standard 5 day workweek, 8 hour workday calendar. As you change this calendar your schedule will change accordingly. For example, if a task starts on Wednesday morning and you enter a duration of 5 Days then the task will Finish on the following Tuesday evening (5 working days from Wednesday).

Durations can also be entered in Elapsed Days. Elapsed days override the calendar, and are scheduled based on a 24 hour day, 7 days a week with no non-working days. Elapsed duration units are defined by entering an E prior to the Duration unit for example, 12eh for 12 Elapsed Hours or 5ed for 5 Elapsed Days. A duration of 5 Elapsed Days from Wednesday would make the finish of a task occur on Sunday evening.

To enter the Duration:

1. If the Duration field is displayed in the Task boxes on the screen, click in this field and type the Duration.

or

2. Double-click the task and type the Duration into the Duration field of the Task Information form.

## Dependencies

A dependency is a relationship between tasks specifying that one task depends on the start or finish of another task before it can start or finish. When planning projects, many tasks must happen in a certain order. Creating dependencies between tasks (or "linking" tasks) defines this order. For example, a dependency may specify that a particular task must finish before another can start, or that one task can only start after another has worked for 5 days, etc.

When you have a dependency between two tasks, the first task in the chain is called the Predecessor and the second is the Successor. The successor depends on the predecessor.

The easiest way to enter and display dependencies in WBS Schedule Pro is in the Network Chart. In the Network Chart, you click and drag between tasks to create dependencies. See [Linking Tasks](#)

As you create the dependencies between tasks in your plan the schedule of the

tasks will update according to these links.

## Constraint Dates

A Constraint Date is a specific date that you assign to a task. Along with this date is a Constraint Type that determines how the date is used (Must Start On, Must Finish On, Start no Earlier Than, etc.). There are several different types of constraints; all require that you enter a date except As Soon As Possible and As Late as Possible.

To display the Constraint Date and Constraint Type for a task, double-click the task to display the Task Information form. Or, add the Constraint Date and Constraint Type column to the Task Sheet.

## Constraint Type

The Constraint Type field allows you to enter the type of constraint. Choose from one of the following:

**As Soon As Possible** – Schedules the task to happen as soon as possible based on the dependencies that precede the task, the task's duration and the project start date. The "As Soon As Possible" constraint does not actually constrain a task to a particular date. Set the Constraint Type to "As Soon As Possible" if you no longer wish to have a Constraint Date associated with a task. It will then be scheduled based on the dependencies.

**As Late as Possible** – Schedules the task to happen as late as possible based on the dependencies that follow the task, the task's duration and the project finish date. The "As Late As Possible" constraint does not actually constrain a task to a particular date.

**Finish No Earlier Than** – Schedules the task to finish no earlier than the date specified in the Constraint Date field.

**Finish No Later Than** – Schedules the task to finish no later than the date specified in the Constraint Date field.

**Must Finish On** – Schedules the task to finish on the date specified in the Constraint Date field.

**Must Start On** – Schedules the task to start on the date specified in the Constraint Date field.

**Start No Earlier Than** – Schedules the task to start no earlier than the date specified in the Constraint Date field.

**Start No Later Than** – Schedules the task to start no later than the date

specified in the Constraint Date field.

### Constraint Date

The constraint date is used along with the Constraint Type for scheduling tasks. The "As Soon As Possible" and "As Late As Possible" constraint types do not use a Constraint Date, thus allowing the task to be scheduled based on the dependencies associated with a task.

Note: To remove a Constraint on a task, assign the "As Soon As Possible" constraint to a task. This will remove the Constraint Date and allow the task to schedule based on the dependencies.

### Actual Start and Actual Finish

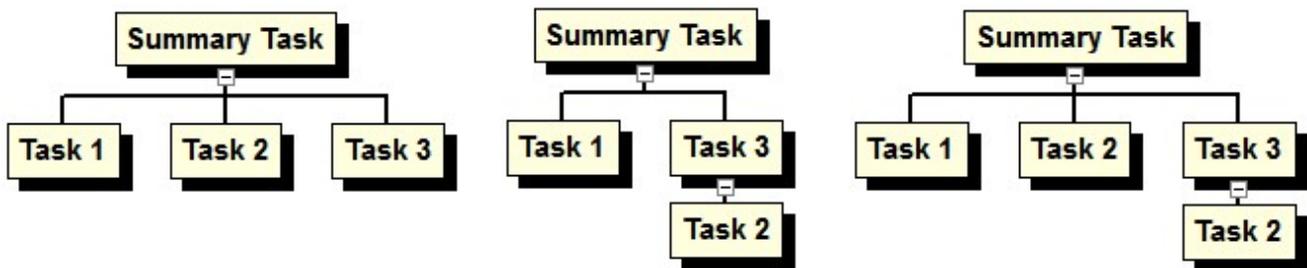
Entering an Actual Start and/or Actual Finish into a Task Information overrides any of the above scheduling options. Once an Actual Start and/or Actual Finish is entered that task will be scheduled on those dates.

## Moving & Repositioning Tasks in a WBS Chart

In the WBS Chart, tasks can be rearranged by several different ways. You can Cut (move) or Copy a task or set of tasks from one part of the WBS chart to another area in the WBS chart thus changes the structure of the chart. You can also Reposition tasks in a WBS Chart that does not change the structure of the chart.

The differences between Cutting/Copying tasks and Repositioning tasks are demonstrated in the following examples and explained in greater detail below:

Cut or Copy involves placing the task in a different part of the WBS chart thus changing the structure.

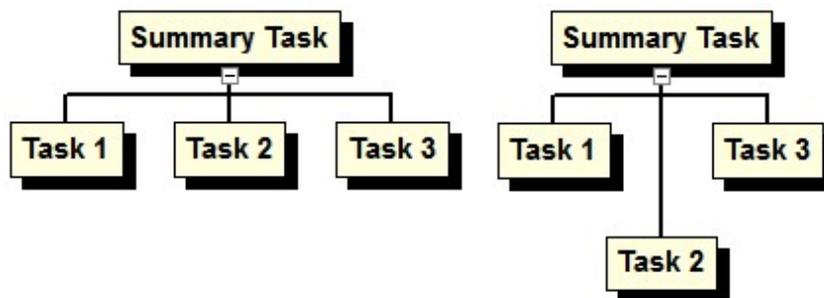


Using Cut or Copy with the above chart...

...Task 2 can be Cut and Pasted below Task 3...

...or Task 2 can be Copied and Pasted below Task 3.

Repositioning involves moving a task or set of tasks without changing the structure of the WBS chart.



Repositioning means to move a task...

...to a new location by dragging the edge of the box.

## Cut/Copy and Paste Tasks in WBS Schedule Pro

When working with an unlinked (standalone) WBS Chart you can select a single task, summary task or multiple tasks to be Cut or Copied. WBS Charts that are

linked to a Microsoft Project Plan are restricted to Copy and Cut actions on a single task or a single summary task only. Performing a Cut or Copy action on a summary task also includes all of the subtasks under the summary task in the action as well.

There are several ways to Cut and Copy tasks:

**Click and Drag** - Place the cursor on a task, left-click the mouse, drag and drop over another task. This Cuts the selected task and places it relative to the destination task based on the red directional arrow (the red up/down/left or right arrow you see when you are over the destination task).

**Ctrl-Click and Drag** - Hold the Ctrl key down, place the cursor on a task, left-click the mouse, drag and drop over another task. This Copies the selected task and places it relative to the destination task based on the red directional arrow (the red up/down/left or right arrow you see when you are over the destination task).

**Right-Click** – Place your cursor on a task and right-click. This displays a menu allowing you to choose to Cut or Copy the selected task. Right-click on another task to display the menu for Pasting.

**Ribbon Buttons** – Select a task and choose the Cut or Copy button on the Home tab to Cut or Copy the selected task. Press the Paste button to Paste Before the selected task or choose the drop down arrow below the Paste button to Paste After or as a Subtask to the selected task.

**Right-Click and Drag** – Place your cursor on a summary task or task, click the Right Mouse button, Drag and place it over the destination task box. This displays the following menu, prompting you to Move or Copy the selected Task relative to the destination task (before, after, or as a subtask). You also have the option of copying the Custom Box Settings from one task box to another. The Custom Box Settings define the box style and color.

## Repositioning Tasks in WBS Schedule Pro

Repositioning a task box to another area of the chart means to move it without changing the structure of the chart. To reposition a summary task or task in the WBS chart, position the mouse over the edge of the box in order to get the up-down arrow or left-right arrow, then:

Click and Drag on the top or bottom edge of a Summary Task or Task box to move its position up or down in the chart.

Click and Drag on the left or right edge of a Summary Task or Task box to move its position left or right in the chart.

Note: Summary tasks and tasks are repositioned relative to the task to their left

by increasing/decreasing this distance. Therefore, some tasks cannot be repositioned if they are the left-most task at that level.

## Moving & Repositioning Tasks in a Network Chart

### Automatic vs. Manual Box Positioning

Tasks in a Network Chart are either Automatically or Manually positioned based. Before you begin clicking and dragging to move tasks around, it is a good idea to understand these two concepts.

### Automatic Box Positioning

Automatic Box Positioning means that WBS Schedule Pro determines the best location for positioning boxes in the Network Chart based on the dependencies defined in the project. In general it tries to place a Successor task directly to the right of its Predecessor task but there are many other rules for placing boxes to account for tasks without dependencies, multiple successors and different types of dependencies (like Start to Start, etc).

By default, all boxes are positioned Automatically until you manually move a box (by clicking and dragging the box edge). Once you move a box the entire Network Chart becomes "locked" and boxes are no longer automatically positioned. When locked, the word LOCKED will appear in the Status Bar at the bottom of the screen.

To Unlock the entire Network Chart and automatically position boxes in the chart, choose the Format tab and select Auto Layout. Or, select a group of tasks on the screen and choose Layout Selected from the Format tab to automatically position only the selected tasks relative to their dependencies.

Note: When you create a Network Chart from Microsoft Project, the tasks are automatically positioned by default. If you move a task and the chart becomes "locked", any new tasks added in Microsoft Project are automatically placed in the most logical position relative to the locked boxes.

### Manual Box Positioning

You can click and drag the edge of a box and place it anywhere in the Network Chart. When you manually position boxes this way the automatic positioning of boxes is turned off and all boxes are locked into position. With a Manually Positioned chart, the schedule is still calculated and the dependency lines are still drawn between boxes, it's just that a task box may not appear next to its predecessor or successor task because it has been moved.

To move a task in a Network Chart:

1. Place the cursor on the edge of a box until you see a four-way arrow.
2. Click and drag this box to a new location in the chart.

You can also highlight and move multiple tasks at once.

Any new tasks that are added are placed in the location where you create them and stay there until you move them or select to Automatically position boxes.

Note: Certain features like Grouping and applying a Timescale may rearrange the tasks in the chart thus overriding any manual box positions. If you have manually positioned tasks in the chart and you wish to apply a Group or Timescale, try making a copy of the current View or try switching Views. Each View maintains box positions separately therefore you can have one view where your boxes are positioned exactly where you want them and another View using the Group or Timescale feature with automatic box positions.

### Moving Tasks when Grouped

If the Network Chart is Grouped and you move a task from one group to another it will move that task into the other group and Lock the chart so it no longer automatically positions tasks. Selecting Auto Layout will automatically position tasks including the task that you moved to the new group. In other words, it positions the recently moved tasks around the tasks in its new group.

## Moving & Repositioning Tasks in a Task Sheet

Moving and repositioning Tasks in the Task Sheet can be done two ways:

1. You can Cut/Copy and Paste by clicking the leftmost column in the chart and selecting Cut or Copy from the Ribbon. Then select another task in the Sheet and press Paste to move or copy the tasks above the selected one.
2. You can click the leftmost column and drag to move tasks from one row in the Task Sheet to another. Select multiple tasks to move more than one.

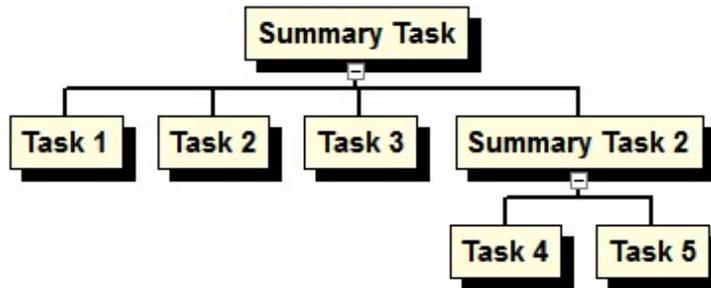
Once the entire row is selected you can also use Ctrl-C to copy, Ctrl-X to Cut and Ctrl-V to Paste tasks.

## Groups and Outlining Defined

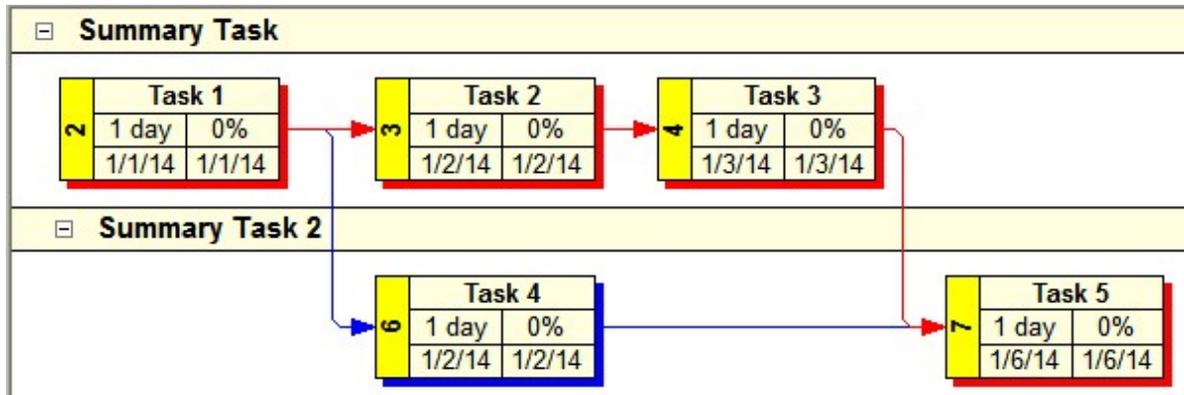
### Grouping Defined

Grouping is a very powerful feature in WBS Schedule Pro. It offers a completely different way to visually organize, display and manage your projects.

Grouping (also referred to as Outlining) defines the structure or hierarchy of a project. By default a project is grouped by Outline. If you use MS Project, this outline corresponds to the "Indenting" that you do in a Gantt Chart. In WBS Schedule Pro, grouping by Outline looks like this in a WBS Chart:



Like this in a Network Chart:



And like this in the Task Sheet:

	Name	Duration	Start	Finish
1	<input type="checkbox"/> <b>Summary Task</b>	<b>4d</b>	<b>1/1/2014</b>	<b>1/6/2014</b>
2	Task 1	1d	1/1/2014	1/1/2014
3	Task 2	1d	1/2/2014	1/2/2014
4	Task 3	1d	1/3/2014	1/3/2014
5	<input type="checkbox"/> <b>Summary Task 2</b>	<b>3d</b>	<b>1/2/2014</b>	<b>1/6/2014</b>
6	Task 4	1d	1/2/2014	1/2/2014
7	Task 5	1d	1/6/2014	1/6/2014

Grouping by Outline is the most common way to organize a project. As you define the structure of the project, Summary Tasks are created. A Summary Task is defined as anything with a subordinate. This is the way MS Project works by default and this is the way WBS Schedule Pro works by default.

WBS Schedule Pro can also be used to display a different structure or hierarchy in a project. You can "Group" by a variety of fields to produce a top-down, WBS-style view, a horizontally-banded Network Chart or an indented Task list. As you Group by other fields in WBS Schedule Pro, Summary Tasks are replaced by Group Headers. A Group Header appears like a Summary Task but is not an entity like a Summary Task, it simply represents the items being displayed under it.

As an example, this Task Sheet uses the Text1 field to add Department values:

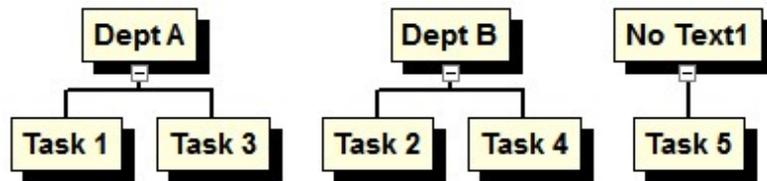
	Name	Text1	Duration	Start	Finish
1	<input type="checkbox"/> <b>Summary Task</b>		<b>4d</b>	<b>1/1/2014</b>	<b>1/6/2014</b>
2	Task 1	Dept A	1d	1/1/2014	1/1/2014
3	Task 2	Dept B	1d	1/2/2014	1/2/2014
4	Task 3	Dept A	1d	1/3/2014	1/3/2014
5	<input type="checkbox"/> <b>Summary Task 2</b>		<b>3d</b>	<b>1/2/2014</b>	<b>1/6/2014</b>
6	Task 4	Dept B	1d	1/2/2014	1/2/2014
7	Task 5		1d	1/6/2014	1/6/2014

If you now "Grouped" this Task Sheet by Text1 it would look like this:

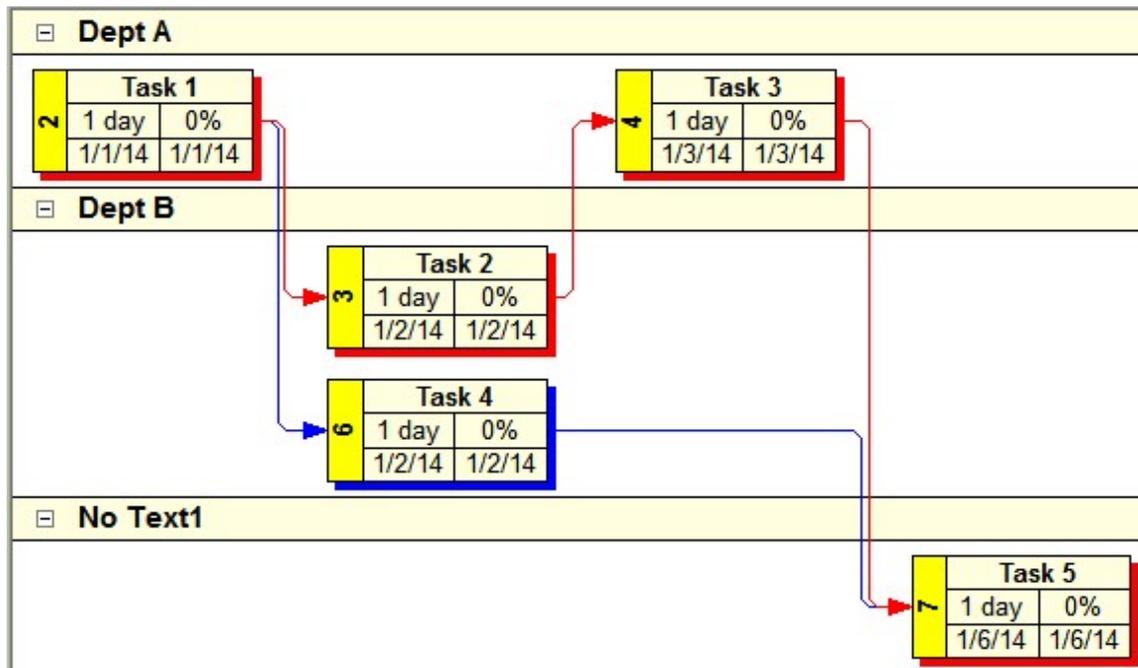
	Name	Text1	Duration	Start	Finish
	▢ Dept A	Dept A	3d	1/1/2014	1/3/2014
2	Task 1	Dept A	1d	1/1/2014	1/1/2014
4	Task 3	Dept A	1d	1/3/2014	1/3/2014
	▢ Dept B	Dept B	1d	1/2/2014	1/2/2014
3	Task 2	Dept B	1d	1/2/2014	1/2/2014
6	Task 4	Dept B	1d	1/2/2014	1/2/2014
	▢ No Text1		1d	1/6/2014	1/6/2014
7	Task 5		1d	1/6/2014	1/6/2014

As you can see the Summary Tasks are replaced by Group Headers that represent the different Department values.

The WBS Chart would look like this:



And the Network Chart would look like this:



Group Headers behave a lot like Summary Tasks. Information is rolled-up to the Group Headers much like Summary Tasks roll up information. Tasks can be added within the groups. Tasks can even be moved from one group to another. As you move tasks from one group to the next the task is updated with the new group value. This allows you to do things like Group by Resource Names and drag a task from one Resource group to another to reassign it.

Grouping is a great way to visually display the various hierarchies that exist in a project. See the next section on the how to change groups and to work with projects while grouped.

## Changing and Editing Groups

### Changing the way projects are Grouped

The Grouping dialog allows you to change how the structure of the project is displayed.

**Grouping**

Use Default Grouping (Summary Tasks and Tasks)

Use a Single Field to Group (should contain hierarchical data, eg: 1, 1.1, 1.2, etc.):

Field:  Blank Label:

Use a Single Non-hierarchical Field or Series of Fields:

	Field	Order	Blank Label
Group By	Resource Names	Ascending	No Resource Names
Then By			
Then By			
Then By			

Sort by:   Descending

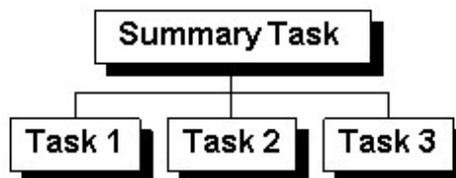
Then by:   Descending

Then by:   Descending

Show Empty Groups

There are three ways to Group the data in a project. They are:

1. The Default Outline Structure - This is the standard way to display a hierarchy in WBS Schedule Pro. Creating a WBS Chart or Indenting Tasks in the Gantt Chart or Task Sheet creates Tasks and Summary Tasks. For example,



or

	WBS	Name	Duration	May 3							
				F	S	S	M	T	W	T	
1	1	☐ Summary Task	3d								
2	1.1	Task 1	1d								
3	1.2	Task 2	1d								
4	1.3	Task 3	1d								

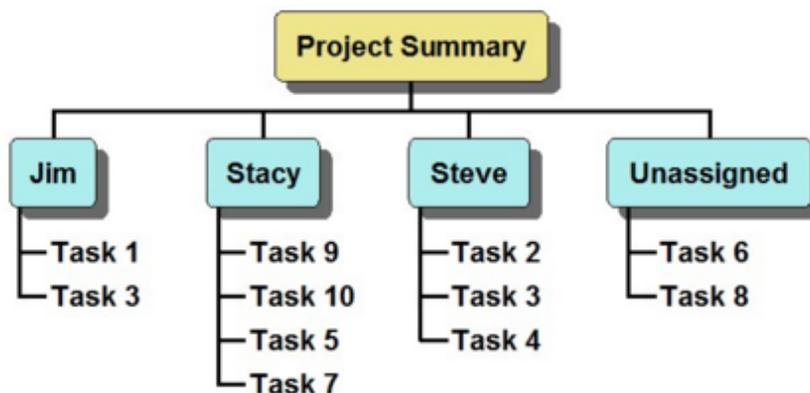
The Default Outline Structure uses the Outline Number field to create the hierarchy. The Outline Number field in WBS Schedule Pro can only be created by Inserting or Moving Tasks and Summary Tasks.

This is the same technique that Microsoft Project uses. Microsoft Project creates the Outline by indenting tasks in a Gantt Chart. In WBS Schedule Pro, creating a WBS Chart or Indenting/Outdenting tasks in the Gantt Chart or Task Sheet creates the same Outline that you would see in Microsoft Project.

2. Using a Single Field - This refers to using a single field to define the structure of the project. This single field must contain hierarchical information such as A, A.1, A.1.1, A.1.2, etc. When you select this field on which to group, WBS Schedule Pro will attempt to parse this field to determine a hierarchy. This is useful if you have defined your own hierarchy using the WBS, Text or Outline Code fields.

3. Using a Series of Fields - This refers to using a non-hierarchical field to display the structure of the project. This can be a single field with many of the same values or several fields with various values to define the structure.

An example of this is the Resource Names field. Grouping on Resource Names would create a hierarchy of Resources and Tasks assigned to these Resources. Like this:



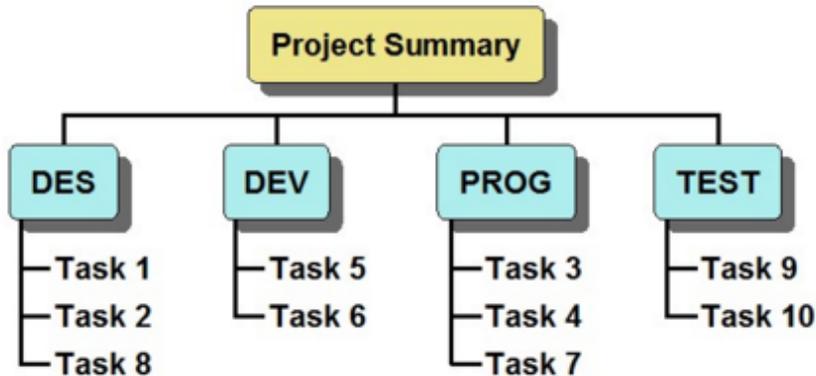
The Text fields are another useful way to utilize this grouping feature. As an example, if you used a Text field to store the Department names you may have information like this:

Name	Text1
<b>Project Summary</b>	
<b>Planning</b>	
Task 1	DES
Task 2	DES
Task 3	PROG
Task 4	PROG
<b>Coding</b>	
Task 5	DEV
Task 6	DEV
Task 7	PROG
<b>Testing</b>	
Task 8	DES
Task 9	TEST
Task 10	TEST

The current outline of the above uses the Default Outline Level to display the structure. Selecting to Group on the Text 1 field would produce this result in a Task Sheet:

	Name	Text1
	<input type="checkbox"/> <b>DES</b>	<b>DES</b>
3	Task 1	DES
4	Task 2	DES
12	Task 8	DES
	<input type="checkbox"/> <b>DEV</b>	<b>DEV</b>
8	Task 5	DEV
9	Task 6	DEV
	<input type="checkbox"/> <b>PROG</b>	<b>PROG</b>
5	Task 3	PROG
6	Task 4	PROG
10	Task 7	PROG
	<input type="checkbox"/> <b>TEST</b>	<b>TEST</b>
13	Task 9	TEST
14	Task 10	TEST

Or this in a WBS Chart:



The above uses a single Text field but you can also use several or a combination of fields that contain the breakdown of information you wish to display.

The Sort by options allow you to change the order in which the detail items appear. The Sort options only apply when you are grouped by a Single non-hierarchical field or Series of Fields.

The Show Empty Groups option displays a group header when there are no items assigned to that group. For example, if you have Resources defined and are Grouped by Resource Names, selecting this checkbox would display all Resources in the chart including Resources that don't have Task assignments. De-selecting this option would only display Resources that have been assigned to Tasks.

The Grouping defined in the Groups dialog applies across WBS Charts, Network Charts, Gantt Charts and Task Sheets unless you select the Independent checkbox in the Home tab. Selecting the Independent checkbox applies the Grouping changes only to the current view.

## Transferring a project to Microsoft Project

You can use WBS Schedule Pro to create your projects first and then transfer these to Microsoft Project for further scheduling.

If you create a new project in WBS Schedule Pro it is considered a "standalone" project. This means that the project (the .wbs file) is a self-contained file with all of the data and formatting options embedded into this file.

To transfer the current WBS Schedule Pro standalone project to Microsoft Project, select the MS Project button on the Home tab.



Transferring a standalone WBS Schedule Pro project to Microsoft Project means that the data that exists in the WBS Schedule Pro project chart will be transferred to the Microsoft Project plan. The WBS Schedule Pro project then becomes "linked" to this Microsoft Project plan.

During this process you are prompted to save the data to the Microsoft Project plan. Once this happens you will then have two files; the Microsoft Project file (\*.mpp) containing the data and the WBS Schedule Pro project (\*.wbs) containing the formatting options. Opening a WBS Schedule Pro file that is linked to a Microsoft Project plan opens the WBS chart with all the formatting and also opens the corresponding Microsoft Project file to which it is linked.

Note: Do not delete a Microsoft Plan that is linked to a WBS Schedule Pro plan. If you do this your data will be lost.

If you have configured Microsoft Project to integrate with WBS Schedule Pro you can also open the Microsoft Project plan first and select the WBS Chart, Network Chart or Task Sheet buttons to go to the saved chart corresponding to the Microsoft Project plan.

## Creating charts from Microsoft Project

If you have configured Microsoft Project to include the integration to WBS Schedule Pro you can create WBS Schedule Pro charts from existing Microsoft Project plans.

To set this up:

- See: [Configuring Microsoft Project 98 to Project 2007](#)
- See: [Configuring Microsoft Project 2010, 2013 and 2016](#)

To create a WBS Schedule Pro chart from an existing Microsoft Project plan:

1. Start Microsoft Project.
2. Click the WBS Chart, Network Chart or Task Sheet button from within MS Project to go to that chart.

WBS Schedule Pro is started and the current project plan from Microsoft Project is displayed in the corresponding chart.

When you create a WBS chart from an existing Microsoft Project plan, the WBS chart is dynamically linked to this Microsoft Project plan. If you add, modify or delete tasks in the WBS chart, this information is immediately sent to Microsoft Project.

Tip: When a WBS chart is dynamically linked to a Microsoft Project plan the word LINKED appears in the lower right corner of the screen.

## Saving a WBS Schedule Pro project linked to a Microsoft Project plan

In a WBS Schedule Pro project that is linked to MS Project, keep in mind that the data is stored in Microsoft Project (a .MPP file) and the WBS chart formatting is stored in the WBS chart file (a .WBS file). When you save a WBS Schedule Pro project that is linked to a Microsoft Project plan, it saves both the WBS Schedule Pro file (.WBS) and the corresponding Microsoft Project plan (.MPP).

The saved WBS Schedule Pro project contains the formatting of the chart, and a link to the Microsoft Project plan where the data is stored.

To save the WBS Schedule Pro project, select the File menu and choose Save (or Save As). Specify a filename and click OK.

## Opening a WBS chart linked to a Microsoft Project plan

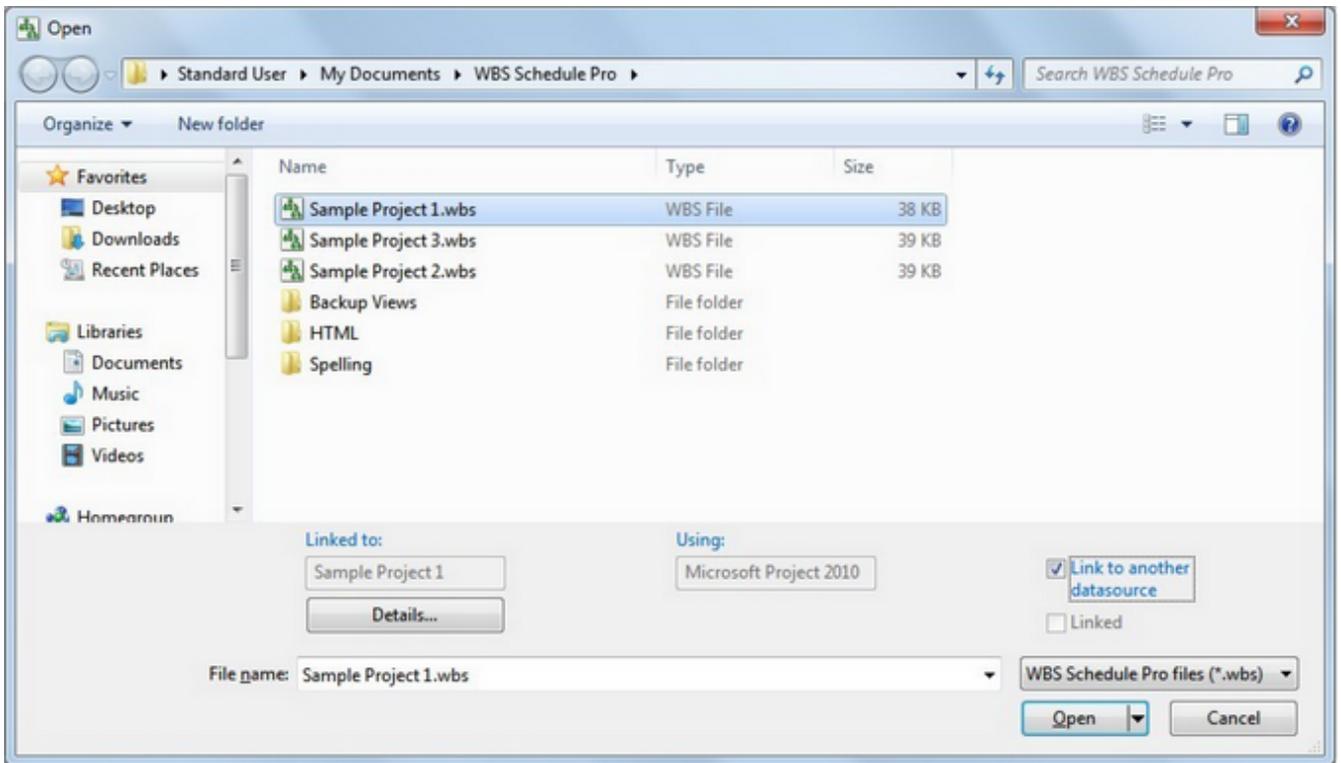
There are two ways to open a WBS Schedule Pro project that is linked to a Microsoft Project plan. They are:

1. From within Microsoft Project, click a WBS Schedule Pro button. If you have previously created a project from this Microsoft Project plan and saved it, it will remember this and automatically open this chart for you to continue working. If it does not open the previously saved chart, see the Note below.

2. From within WBS Schedule Pro, if you open the WBS Schedule Pro project (\*.WBS file) that is linked to the Microsoft Project plan it will automatically open Microsoft Project and the corresponding Microsoft Project plan.

Note: If you rename or move a Microsoft Project plan that is linked to a WBS Schedule Pro project, Microsoft Project may not be able to locate the WBS Schedule Pro project the next time you try to load it from the Microsoft Project plan. If you move or rename a Microsoft Project plan that is linked to a particular WBS Schedule Pro file, perform the following to relink the MS Project plan to the WBS Schedule Pro file:

1. Open WBS Schedule Pro.
2. Select File-Open.
3. Click on the WBS Schedule Pro file (the .WBS file) that was linked to the Microsoft Project plan.
4. Select Link to another datasource and click Open.
5. Locate the Microsoft Project plan and select Open.



When you save the WBS Schedule Pro project it will remember the new name and location of the Microsoft Project plan to which it is linked.

## Tips for using WBS Schedule Pro with MS Project

When you create a chart from an existing Microsoft Project plan you must remember that you are dynamically linked to this plan and any changes made in WBS Schedule Pro are immediately reflected in Microsoft Project. If you add or delete tasks in WBS Schedule Pro, these tasks are immediately added or deleted in Microsoft Project.

A chart created from an existing Microsoft Project can be saved but this does not save the data into the .wbs file. All project data is still maintained in Microsoft Project. Saving a chart that is linked to a Microsoft Project plan only saves the link and any chart-specific items that cannot be saved in Microsoft Project like box placement, custom box colors and formatting options.

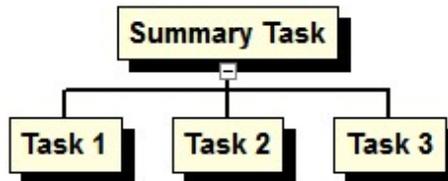
If you create a chart from an existing Microsoft Project plan and you do not want this chart to be dynamically linked to the corresponding Microsoft Project plan you can Unlink the chart. In WBS Schedule Pro, to Unlink a plan from a MS Project plan, choose Project-Unlink. Unlinking the chart from the Microsoft Project plan will save all of the data to the WBS Schedule Pro file. Once you save as a standalone chart, this chart cannot be linked back to the original Microsoft Project plan from which it was created. You can only use this standalone chart to create anew Microsoft Project plan.

See also [Saving charts](#)

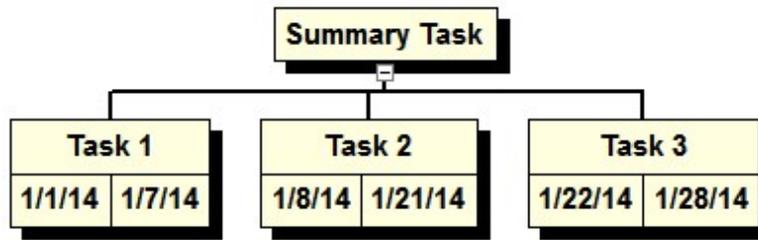
## Displaying Fields in Task Boxes

### WBS Charts

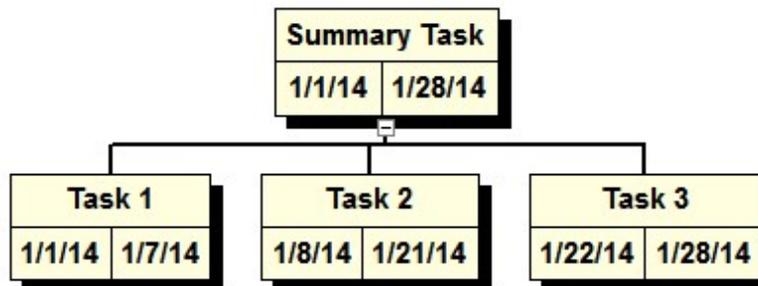
In a WBS Chart a variety of fields can be displayed in the Summary Task and Task boxes on the screen. For example, you could simply have the Name field displayed in the boxes:



Or, you could display the Start and Finish dates for all Tasks in your chart:



Or, you could display Start and Finish dates for both the Summary Tasks in the chart and Tasks in the chart:



The number of fields and arrangement of fields within a box is completely configurable. There are no limits to the numbers of fields you can place in a box. You can even place fields outside of a box. For WBS Charts you can have a different arrangement of fields for Summary Tasks and Tasks.

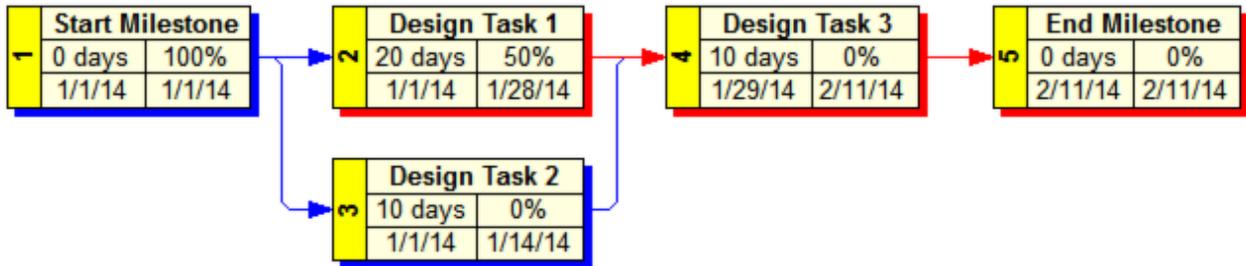
To change which fields are displayed in the Summary Task and Task boxes on the screen for WBS Charts, go to the **Format** tab and select **Fields-Summary Tasks** or **Fields-Tasks**.

The fields within Summary Task boxes and Task boxes are configured separately.

Since the same technique is used to modify the fields within both Summary Task and Task Boxes they are covered in one Help Topic. For more information on how to configure the fields within Summary Task and Task Boxes see [Task Boxes](#)

### Network Charts

A Network Chart can also have a variety of fields displayed in a box on the screen:



For Network Charts, both Summary Tasks and Tasks use the same field arrangement. To change which fields are displayed in the boxes on the screen for Network Charts, go to the Format tab and select Fields.

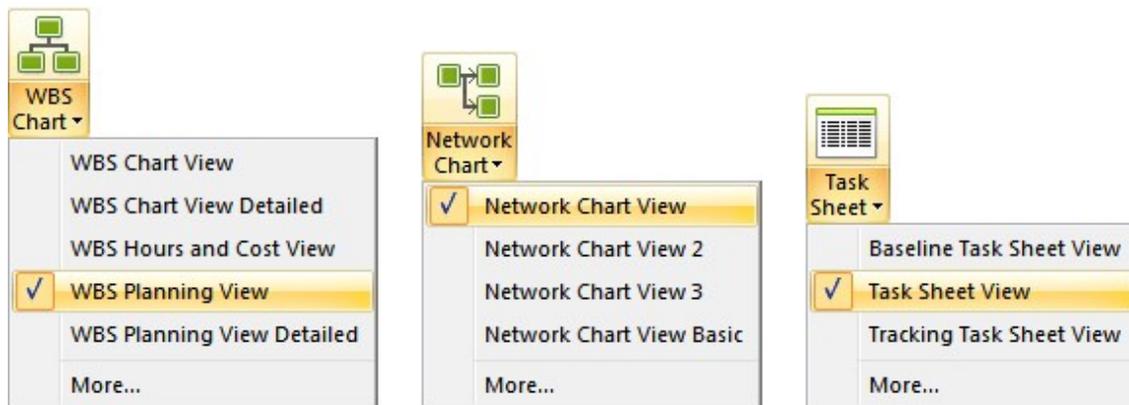
See [Task Boxes](#)

## Working with Views

A View is a collection of formatting options that make up how a WBS Chart, Network Chart or Task Sheet is displayed. A View defines things such as which fields are displayed in the boxes, font styles/colors, box colors and styles, default arrangement of boxes, styles of connecting lines between the boxes, etc. The WBS Schedule Pro program comes with several pre-defined Views that you can use and modify, or you can define your own.

### Displaying Different Views

The three basic View types in WBS Schedule Pro are WBS Charts, Network Charts and Task Sheets. Within these three are Views that show different styles of charts and sheets. Select a View by clicking on the drop down arrow on a View type and selecting the desired View.



### How Views Work

There are several pre-defined Views installed with the WBS Schedule Pro program (in Documents\WBS Schedule Pro). These Views have a .wbv extension. When you create a New project in WBS Schedule Pro or create a chart of a Microsoft Project plan for the first time it copies these Views into the current chart. When you switch Views in the chart and modify the formatting of the chart, this information is saved in two ways:

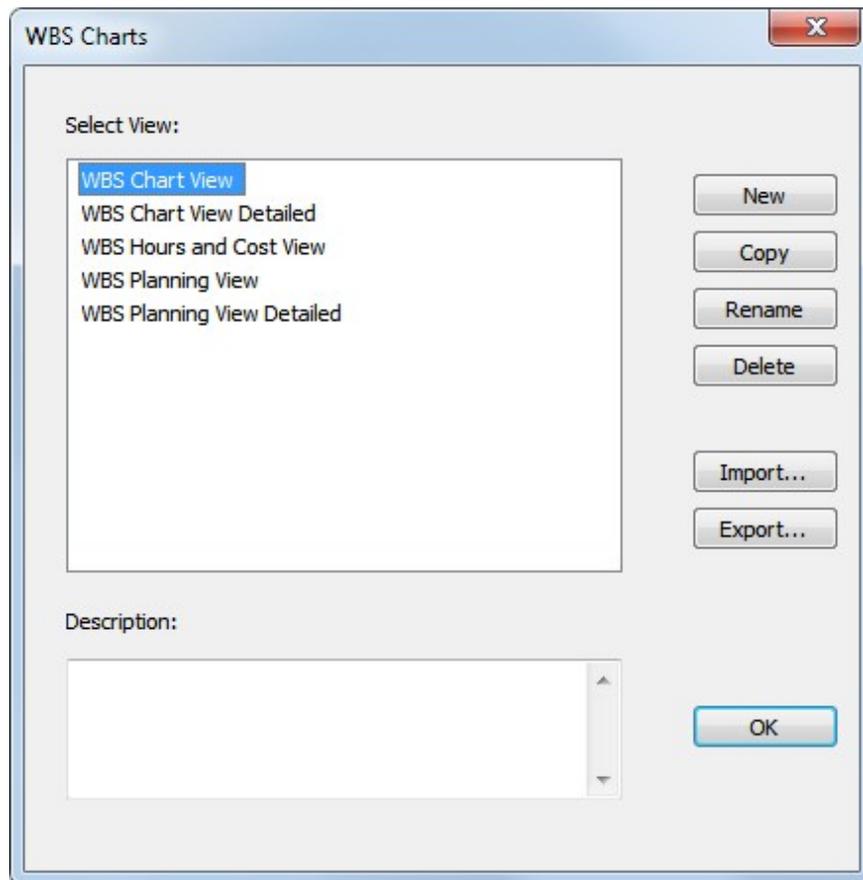
1. If you save the project, all Views and changes made to the Views are saved within this chart. The next time you open this saved project all of your Views are as you saved them within the project.
2. By default, when you close a project, all of the modified Views in this project are automatically saved over the default Views in the folder where the Views are stored. This means that when you open another New project or create another project from a Microsoft Project plan, your project is displayed based on the modified Views from your last project.

Note: If you do not want to automatically save the changed Views in a chart as you close it, select File-Options and change the "When closing a chart " option to " Prompt to save changed Views" or "Do not save changed Views". Choosing "Do not save changed Views" still saves the Views within the chart, but does not affect the default Views. See [Options](#)

## Creating and Modifying Views

To modify a View, switch to a View. Once in a View, anything you change in the chart that is not data or program specific is saved within that View. To modify a View, it is best to select a View that is similar to what you want and make additional changes from there.

You can also create new Views. To create a New View, select the WBS Chart, Network Chart or Task Sheet drop down arrow and select More...



The Views dialog box allows you to create New Views, Copy, Rename, Delete, Import and Export Views. Selecting a View from this list and clicking OK will apply this View to the chart. The other options are described below:

New – Creates a New View with minimal formatting options. Once created, click

OK to apply this View to the current WBS chart and then modify this View using the Format and View menus.

Copy – Makes a copy of the selected View.

Rename – Allows you to rename the selected View. You can also press F2 to rename the selected View.

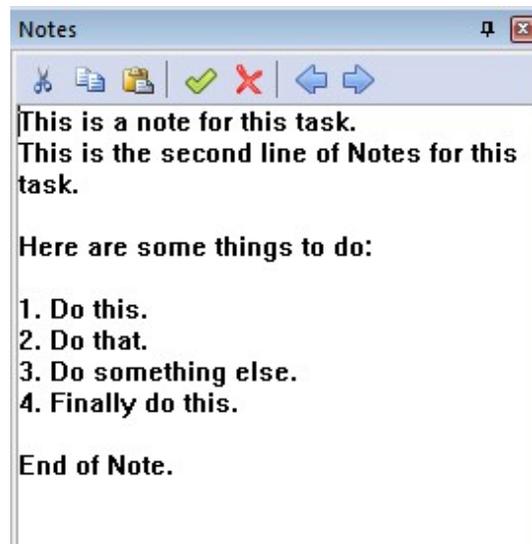
Delete – Removes the selected View from the current WBS chart file. This does not delete the View from the directory where the Views are stored it only deletes the selected View from the current WBS chart.

Import – Allows you to import a View into the current WBS chart.

Export – Allows you to export the selected View from the current WBS chart.

## Adding Notes

Using the Notes field is a great way to add detailed descriptions to the tasks in a project. The Notes field in WBS Schedule Pro can handle a large amount of text and is the only field that supports line feeds so you can press Return to display text on the next line. The Name and the Text fields can wrap in a cell but this is automatic; you cannot manually enter a line feed. For this reason, the Notes field is the recommended way to add lengthy descriptions to tasks in a project.



*An example of Notes in the Notes Pane*

There are several ways to enter Notes in WBS Schedule Pro. These are:

Notes Pane - Click the Notes tab on the left side of the screen. Try dragging the Notes tab to the middle of the chart so it "floats" and is not docked to the other panes. Select tasks in your project and enter or edit the Notes in the pane. See [Notes Pane](#)

Task Information form - Doubleclick a task and select the Notes tab.

Task Sheet - Add the Notes field to a Task Sheet. Or, try switching to the Task Sheet view titled Task Sheet View with Notes. This Task Sheet displays the Notes field as the last column and is a convenient way to see the Notes for several tasks at a time.

You can also add the Notes field to the Task boxes in a WBS or Network Chart but this is not recommended for large amounts of text in the Notes field.

## Printing Notes

Print the Notes using one of the following approaches:

From the Task Sheet - Choose the view called Task Sheet View with Notes or add the Notes column to any Task Sheet. Select the Wrap option in the Column Definition to enable wrapping of the Notes field. Task Sheets are automatically sized to fit the width of the page so try to keep the total width of the Task Sheet as narrow as possible.

From the Word Export - The Export to Word feature uses pre-defined templates to create a WBS Dictionary of a project. The WBS Dictionary 1 and WBS Dictionary 2 templates contain the Notes field. Export to one of these or modify and/or create your own template to include the Notes field.

Include the Notes field in a WBS or Network Chart - Use the options in Format-Fields to add the Notes field to the task boxes in the chart. This is not recommended where the Notes field contains a large amount of data.

### The Notes field and Microsoft Project

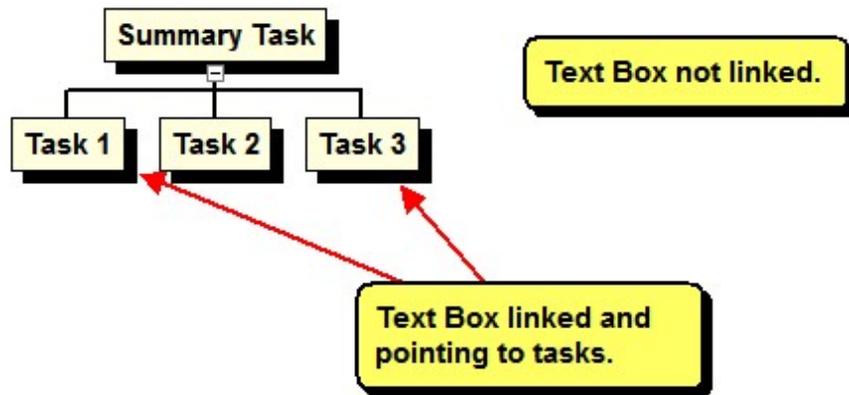
The Notes field is a different type of field in MS Project. Notes in MS Project can contain formatting, embedded objects, bullets, etc. and requires special handling to support.

Notes entered in a standalone WBS Schedule Pro project and transferred to MS Project are transferred exactly as you entered them in WBS Schedule Pro.

Notes entered in MS Project and transferred to WBS Schedule Pro appear unformatted in WBS Schedule Pro. This is due to the fact that there is no way for WBS Schedule Pro or any other program to read or access "formatted" Notes from Project. MS Project can only export plain text from the Notes field so this is how they are displayed in WBS Schedule Pro. For this reason, Notes in a project linked to a MS Project plan become read-only in WBS Schedule Pro. You must return to MS Project to edit the Notes in order to preserve any fancy formatting done in the Notes field.

## Adding Text Boxes to a Chart

You can add free-form text to any WBS or Network chart. To add a Text Box, right-click in white space and choose **Add Text Box** to add a box not linked to a task. To create a Text Box that is linked to a task, select a task and choose **Insert-Add Linked Text Box**. Or simply right-click over any task or summary task and select **Add Linked Text Box** to add a box linked to a task.



Adding a Linked Text Box allows you to point to a task or several tasks with information pertaining to these tasks.

## Working with the Text Boxes

Here are some tips for working with the Text Boxes:

Click in the middle of the Text Box and drag it to place it elsewhere in the chart.

Click the Text Box and start typing to enter text. Or, doubleclick in the box to edit the text.

Click and drag the edge of the box to resize it. Unlike Tasks and Summary Tasks in the WBS and Network Charts, Text Boxes do not automatically resize to the amount of text in the box.

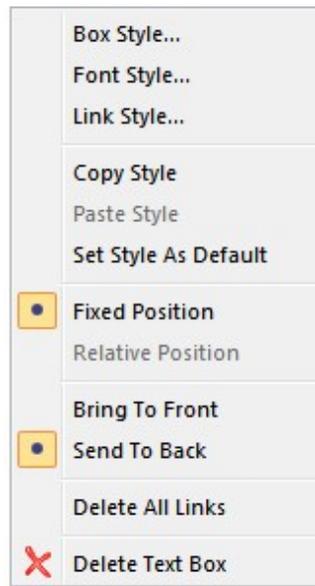
Click and drag from a task to the Text Box to draw a link from that task to the Text Box.

Right-click the Link Line to edit that specific link. Right-Click the Text Box and select **Link Style** to edit all Links for that Text Box.

Right-Click the Text Box to display the Text Box menu. See below.

## Text Box Menu

Right-click on a Text box to display the menu.



**Box Styles** - Edit the Box Shape, Color, Fill Color and Shadow for the selected Text Box. Choose Reset to remove any custom styles and use the Default style.

**Font Style** - Edit the Font style for the selected Text Box.

**Link Style** - Edit the Links for the selected Text Box. This modified all links associated with this Text Box. Right-click an individual link to edit just that link.

**Copy Style** - Copies the current Box, Font and Link Styles of the selected Text Box.

**Paste Style** - Select a Text Box and choose Paste Style to paste the attributes of the Copied Text Box.

**Set Style as Default** - Sets the style of the current Text Box as the default style for any new Text Boxes in this chart and all new charts.

**Fixed Position** - Fixes the Text Box to the current location on the chart. As tasks in the chart move around the Text Box stays in its original position.

**Relative Position** - The Text Box moves relative to the Task to which it is linked. Relative positioning only applies when a Text Box is linked to one task. If you link multiple tasks to a Text Box it switches to Fixed Position and the Text Box does not move with the tasks to which it is linked.

**Bring to Front** - Text Boxes placed over tasks in the chart display on top of the tasks.

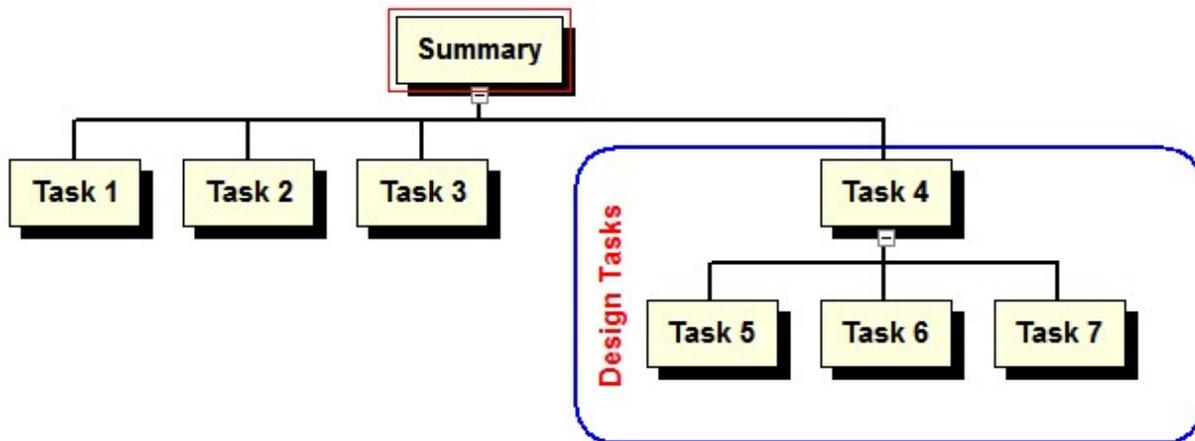
**Send to Back** - Text Boxes placed over tasks in the chart display behind the tasks.

Delete All Links - Removes any links associated with the selected Text Box. Right-click on an individual link to delete just one.

Delete Text Box - Deletes the current Text Box.

### A Neat Trick

Below is a creative way to use the Text Box feature to enclose a set of tasks in a Chart. To create this effect, add a Text Box and enter the Design Tasks text. Then, right-click and select Box Style. Set the Box color to Blue and set the Fill and Shadow to None. Click OK. Right-click on the Text Box again and select Font Style. Set the Color to Red and Rotate to 270. Click OK. To make the group follow the tasks as they move, click from any task in the group and drag over the Text Box to link it. Then, drag the Text Box over the tasks you wish to enclose. Make sure the Relative Position and Send to Back options are selected to get the results shown below.

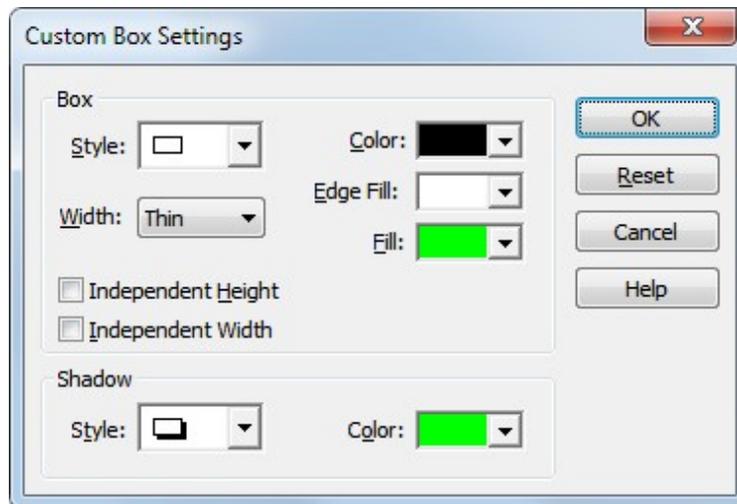


## Custom Box Settings

For Help on Custom Text Box Settings, see [Adding Text Boxes to a Chart](#)

Define individual custom box styles for the selected task(s) in a chart. Custom Box Settings override the chart-wide styles defined in Format-Boxes which are based on certain conditions (Critical vs. Noncritical, for example). To automatically set Box Styles based on certain conditions, see [Format-Boxes](#)

Access Custom Box Settings by right-clicking on a task or by selecting multiple tasks and right-clicking on any one of them. The Custom Box Setting applies to all selected tasks.



### Box

**Style** – Define the shape of the box by choosing from the various styles in this list.

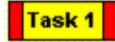
**Width** – Define the thickness of the border by choosing Thin, Medium or Thick from the list.

**Independent Box Height** – If you have chosen to Match Box Heights, you can select this option to not include the selected task(s).

**Independent Box Width** – If you have chosen the Match Box Widths, you can select this option to not include the selected task(s).

**Color** – Define the color of the box from the list of colors.

**Edge Fill** – Define the color of the outside edge of the box. The Edge Fill color only applies if you have defined a Style that contains an area (edge) outside of the box. For example:



Fill – Define the color of the interior of the box. The above example shows a Yellow Fill color on all three boxes.

### Shadow

Style – Define the style of the shadow or choose None for no shadow.

Color – Define the shadow color from the list of colors.

Reset – Removes all of the Custom Box Settings and reverts to using the settings defined in Format-Boxes.

Tip: To Reset all of the boxes in the chart and use the chart-wide settings defined in Format-Boxes, press Ctrl-A in your chart, right-click on any task and select Reset. This will remove all Custom Box Settings in the chart.

## Saving Projects

To save a project:

1. Choose File-Save (or File-Save As).
2. Select a location to save the file and enter a name for this file in the filename field.
3. Make sure the "Save as type" option is set to WBS Schedule and click OK to save this file.

WBS chart files created in WBS Schedule Pro have an extension of .WBS.

A WBS chart is either saved "standalone" or "linked" to a datasource (such as a Microsoft Project plan, an MPX file, XML file or a Text file).

### Saving a project (standalone)

Saving a standalone WBS Schedule Pro project saves all of the project data, box colors, views and formatting options into a single file. This is what happens when you open WBS Schedule Pro, create a project and save it. If you only use WBS Schedule Pro to create your projects then your charts are always saved "standalone" and this file is a completely self-contained file.

### Saving a project (linked)

Saving a WBS chart that is "linked" to a datasource saves all of the chart formatting into the WBS file but the data remains in the datasource. For example, if you are using WBS Schedule Pro with Microsoft Project and you create a chart of a Microsoft Project plan, the data is saved in Microsoft Project but the chart formatting is saved in the WBS Schedule Pro file. The .wbs file is then "linked" to this Microsoft Project plan. The data that you see in the WBS Schedule Pro project is not actually in WBS Schedule Pro but a reflection of what is maintained in Microsoft Project. If you make changes to this data in WBS Schedule Pro such as adding new tasks, moving tasks or deleting tasks, this is actually being done dynamically in Microsoft Project.

When you save and close a linked WBS chart and then re-open this WBS chart file, it also opens the Microsoft Project plan to which it is linked.

Note: When you Save a WBS chart that is linked to a Microsoft Project plan this also saves the plan in Microsoft Project.



## Opening Projects

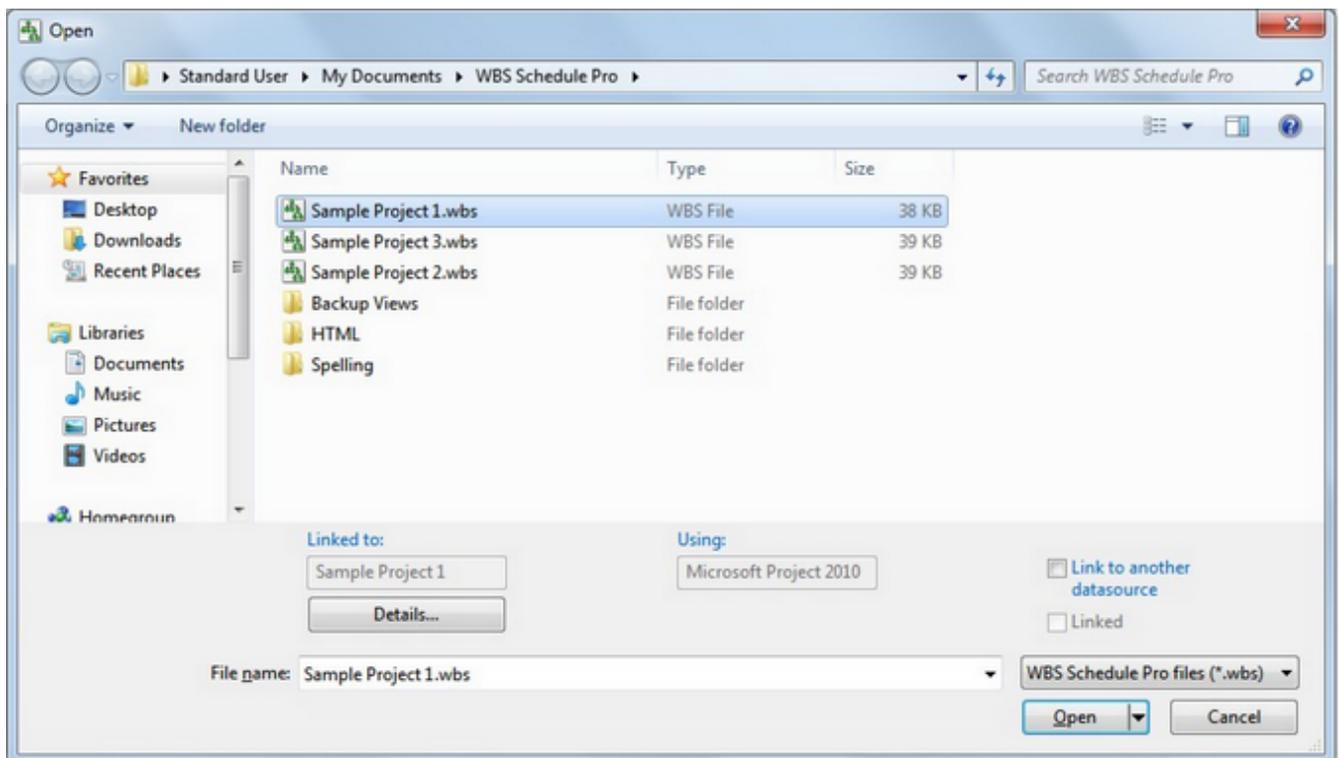
### Opening a standalone WBS Schedule Pro project

To open a standalone WBS Schedule Pro project, choose the File-Open menu and locate the appropriate project.

### Opening a WBS Schedule Pro project linked to a Microsoft Project plan

There are two ways to open a WBS chart that is linked to a Microsoft Project plan:

1. From within Microsoft Project, click the WBS Schedule Pro toolbar button. If you have previously created a chart from this Microsoft Project plan and saved the chart, it will remember this and automatically open this chart for you to continue working. If it does not open the previously saved WBS chart, see the Note below.
2. From within WBS Schedule Pro, if you open the project (\*.wbs file) that is linked to the Microsoft Project plan it will automatically open Microsoft Project and the corresponding Microsoft Project plan.



Note: If you rename or move a Microsoft Project plan that is linked to a WBS Schedule Pro project it may not be able to locate this WBS file the next time you to create a chart from the Microsoft Project plan. If you move or rename a Microsoft

Project plan that is linked to a particular WBS Schedule Pro file, perform the following to link this new MS Project plan to the WBS Schedule Pro file:

1. Open WBS Schedule Pro.
2. Select File-Open.
3. Select the WBS chart file (\*.WBS) that was linked to the Microsoft Project plan.
4. Check "Link to another datasource" and click Open.
5. Locate the MS Project plan and select Open.

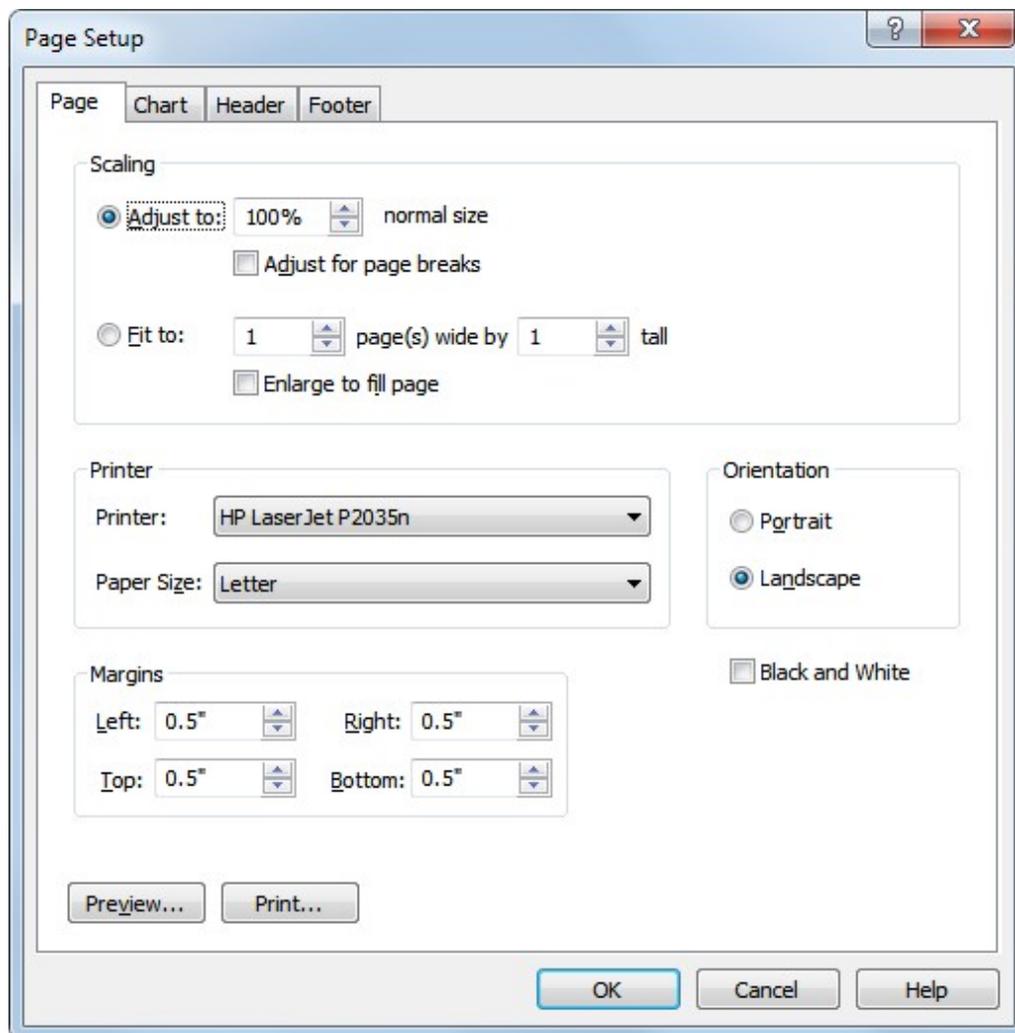
When you save the WBS Schedule Pro project it will remember the name and location of the new Microsoft Project to which it is linked.

See also [Open](#)

## Printing

There are many options for configuring and printing WBS Charts and Network Charts. These same options are not available for printing the Task Sheet. The Task Sheet only allows you to set the orientation, preview and print. The Task Sheet is automatically sized to the width of the page and then printed on as many pages as needed.

For Printing WBS and Network Charts, start with Page Setup (choose the file menu and then Page Setup). The Page Setup dialog is where you configure the orientation of the chart, select Chart options like legends and borders, and enter information into the Headers and Footers of the chart. See [Page Setup](#)



It's always a good idea to preview the chart in Print Preview. Select Preview... within Page Setup to see how your chart will look when printed. From Preview you can go back to Page Setup to make additional changes. When you are satisfied with the

current chart displayed in Print Preview, press the Print... button to send the chart to the printer.

## Fields in WBS Schedule Pro

There are many different data fields in WBS Schedule Pro. Since WBS Schedule Pro integrates seamlessly with Microsoft Project, the fields are similar to the Task fields found in Microsoft Project.

### Fields in WBS Schedule Pro

% Complete – Percentage of the task's duration that has been completed.

% Work Complete – Percentage of the task's work that has been completed.

Actual Cost – Cost of actual work performed to date by all resources on a task, plus any fixed costs.

Actual Duration – The span of actual working time for a task so far, based on the scheduled duration and current remaining work or completion percentage.

Actual Finish – The date and time a task actually finished.

Actual Overtime Cost – Cost for overtime work already performed on a task by all assigned resources.

Actual Overtime Work – The actual amount of overtime work already performed by all resources assigned to a task.

Actual Start - The date and time a task actually started.

Actual Work – The amount of work that has already been done by the resources assigned to the task.

ACWP – Cost of actual work performed to date on the project, plus any fixed costs.

Assignment – A field calculated by MS Project to indicate if an item is an assignment. The Assignment field for tasks is always No.

Assignment Delay – The amount of time a resource is to wait before starting work on an assignment.

Assignment Units – The percentage or number that represents the assigned resources' allocation to a task.

Baseline Cost – The total planned costs for a task before any costs have been incurred.

Baseline Duration – The planned duration time for a task to complete.

Baseline Finish – The planned completion date for a task.

Baseline Start – The planned start date for a task.

Baseline Work – The planned amount of work to be performed by all resources for a

task.

BCWP – The budgeted cost of work performed, also known as earned value. Refers to the value of the work completed.

BCWS – The budgeted cost of work scheduled is the planned completion percentage multiplied by the planned cost.

Confirmed – Indicates whether all resources assigned to a task have accepted the task assignment.

Constraint Date – The specific date associated with certain constraint types, such as Must Start On, Must Finish On, Start No Earlier Than, Start No Later Than, Finish No Earlier Than, and Finish No Later Than.

Constraint Type – The type of constraint applied when scheduling a task (As Soon As Possible, As Late As Possible, Must Start On, Must Finish On, Start No Earlier Than, Start No Later Than, Finish No Earlier Than, and Finish No Later Than).

Contact – The name of the contact person for a task.

Cost – The cost for a task based on the work performed by all resources assigned to the task, as well as fixed costs.

Cost1-10 – Cost fields 1-10 can be used to show any custom cost information for a task.

Cost Rate Table – The cost rate table to use for the resources assigned to a task.

Cost Variance - The difference between the baseline cost and total cost for a task.

Created – The date and time when a task was added to the project.

Critical – Indicates if a task is on the critical path.

CV – The earned value cost variance shows the difference between the planned costs (baseline costs), and the current cost based on actual costs to date along with the remaining estimated costs (scheduled costs). The difference between these two values produces either a positive (over budget) or negative (under budget) cost variance.

Date1-10 – Date fields 1-10 show any custom date information for a task.

Deadline – A target date specifying when you want a task to complete.

Delay – The amount of time to delay a task.

Duration – The amount of time to complete a task.

Duration1-10 – Duration Fields 1-10 can be used to show any custom duration information for a task.

Duration Variance – The variation between the planned (baseline) duration of a task and the current estimated task duration, based on the work completed to date and the remaining work to be performed.

Early Finish – The earliest date that a task could possibly finish, based on the task's predecessors, successors and other constraints.

Early Start – The earliest date that a task could possibly begin, based on the task's predecessors, successors and other constraints.

Effort Driven – Indicates whether the scheduling for the task is effort driven.

External Task – A task that is linked from an external project into the current project.

Finish – The date and time a task is scheduled to complete.

Finish1-10 - Finish fields 1-10 show any custom finish information for a task.

Finish Variance – The time difference between a task's baseline finish date and its current finish date.

Fixed Cost – A cost that does not increase or decrease based on the amount of time a resource works on a task.

Fixed Cost Accrual – How and when fixed costs are to be charged, or accrued to the cost of the task (start, prorated, or end).

Flag1-20 - Flag fields 1-10 are Yes/No flags that show any custom information for a task.

Free Slack – The amount of time a task can slip before it delays another task.

Hide Bar – A Microsoft Project Yes/No field indicating whether the Gantt bars and Calendar bars are hidden.

Hyperlink – The title for a hyperlink associated with a task.

Hyperlink Address – The address for a hyperlink associated with a task.

Hyperlink Href – The concatenation of the Hyperlink Address and the Hyperlink Subaddress fields associated with a task.

Hyperlink SubAddress – The specific location within a Hyperlink page associated with a task.

ID – The identification number assigned to a task. This is not a static number, and may change with the sequence of the task within the schedule.

Late Finish – The latest date that a task may finish without delaying the finish of the project.

Late Start – The latest date that a task may start without delaying the finish of the project.

Level Assignments – Indicates whether the resource leveling function can delay and split resource assignments within a task in order to resolve overallocations.

Leveling can Split - Indicates whether the resource leveling function can split

resource assignments on remaining work for the task.

Linked Fields – Indicates whether there is a task linked to this task.

Marked – A Yes/No field for information.

Milestone – Indicates whether a task is a milestone. If a task has a duration of zero it is a milestone.

Name – The name of the task.

Notes – Displays Notes for the task. Enter a large amount of text into this field. Notes are transferred to Microsoft Project but only up to the number of characters that Microsoft Project can handle which varies by version. Notes are read-only if your WBS Schedule Pro plan is linked to a Microsoft Project plan.

Number1-20 - Number fields 1-20 show any custom numeric information for a task.

Objects – The number of objects attached to a task.

Outline Level – The level number of the task in the outline hierarchy.

Outline Number - The outline number of the task in the hierarchy.

Overallocated – Indicates whether any of the resources assigned to the task are assigned beyond the normal working capacity.

Overtime Cost -The total overtime cost for a task.

Overtime Work – The total overtime work for a task.

Predecessors – The ID number of the task that precedes this task. It is the task that this task depends on before it can start or finish.

Preleveled Finish – The finish date of the task before resource leveling was done.

Preleveled Start – The start date of the task before resource leveling was done.

Priority – The level of importance assigned to a task. This priority is used when determining delays and splits during resource leveling.

Project – The name of the project to which the task belongs.

Recurring – A task that is repeated during the life of a project.

Regular Work – The total amount of nonovertime work scheduled to be performed by all resources assigned to the task.

Remaining Cost – The remaining scheduled cost of a task that will be incurred at the tasks completion.

Remaining Duration – The remaining scheduled amount of time required to complete the task.

Remaining Overtime Cost – The remaining scheduled overtime expense for the task.

**Remaining Overtime Work**– The remaining scheduled amount of overtime required to complete the task by all assigned resources.

**Remaining Work** - The remaining scheduled amount work to be performed on a task by all assigned resources.

**Resource Group** – The list of resource groups to which the resources assigned to a task belong.

**Resource Initials** – The abbreviations for the names of the resources assigned to a task.

**Resource Names** – The names of all the resources assigned to a task.

**Response Pending** – An MS Project field indicating whether an answer has been received from the resources assigned to a task.

**Resume** – The date the remaining portion of a task is scheduled to resume after a new value is entered for the % complete field.

**Resume No Earlier Than** - The earliest date the remaining portion of a task is scheduled to resume after a new value is entered for the % complete field.

**Rollup** – Indicates whether subtask values are rolled up and summarized in a summary task.

**Start** - The date and time that a task is scheduled to begin.

**Start1-10** - Start fields 1-20 show any custom start date information for a task.

**Start Variance** – The time variance between a task's baseline start date and its currently scheduled start date.

**Stop** – The date of the actual end of a portion of a task. Typically used in conjunction with resume.

**SubProject** – The name of a project inserted into the current project.

**Subproject Read Only** – Indicates whether the subproject is read-only.

**Successors** – The task ID numbers of the dependent tasks scheduled to begin after the start or finish of this task.

**Summary** – Indicates whether a task is a Summary Task.

**SV** – The earned value schedule variance shows the difference in cost terms between the current progress and the baseline plan of the task ( $SV = BCWP - BCWS$ ).

**TeamStatus Pending** – An MS Project indicator whether an answer has been received from assigned resources.

**Text1-30** - Text fields 1-30 show any custom text information for a task.

**Total Slack** – The amount of time a task can be delayed without delaying the project finish date.

Type – Affects the work, resource assignment units, and duration calculations (Fixed Work, Fixed Units, Fixed Duration).

Unique ID – The unique identification number of a task.

Unique ID Predecessors – The unique identification numbers of the predecessor tasks.

Unique ID Successors – The unique identification number of the successor tasks.

Update Needed – Indicates whether an update message should be sent to the assigned resources for the task.

WBS - The work breakdown structure code that represents the task position within the hierarchical structure of the project.

WBS Predecessors – The WBS identification numbers of the predecessor tasks.

WBS Successors – The WBS identification numbers of the successor tasks.

Work – The total amount of time scheduled on a task by all assigned resources.

Work Contour – Determines how work for an assignment is distributed across the duration of the assignment.

Work Variance – The difference between a task's baseline work and the currently scheduled work.

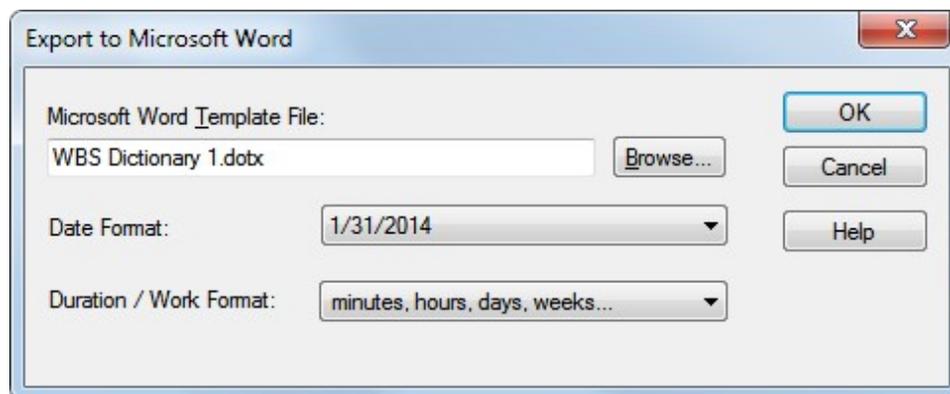
## Exporting to Microsoft Word

The Export to Microsoft Word feature allows you to export projects to a pre-defined Word document. This is useful for creating a "WBS Dictionary" of the project. Use the sample Word templates installed in the WBS Schedule Pro folder, modify one of these templates or create your own templates to meet your needs.

To Export WBS Schedule Pro data and use one of the installed Word templates:

1. Open your project in WBS Schedule Pro.
2. Click the Word button on the WBS Schedule Pro toolbar.
3. Use the selected template or select Browse... to select another.
4. Select formatting options and click OK to create the Word document.

Note: WBS Schedule Pro exports the currently visible items in the chart to the Word document. This means that if you collapse or filter tasks (via MS Project), only the Summary Tasks and Tasks on the screen at the time of the Export will be transferred to Word. This allows you to create WBS Dictionaries of only the items you wish by hiding the ones you don't want to view.



**Microsoft Word Template File** - Displays the Microsoft Word Template that will be used when exporting. This Word Template file contains field placeholders on a pre-defined page. The project data from the current WBS Schedule Pro plan is merged with this Template file to create a Word document (WBS Dictionary). Select Browse to display a list of available .dot and .dotx templates. Modify the Templates in Word to customize the look and the fields you want to appear in the document.

**Date Format** - Select the Date Format for any dates that appear in the document.

**Duration / Work Format** - Select the format for displaying Duration and Work.

## Modifying the Word Template

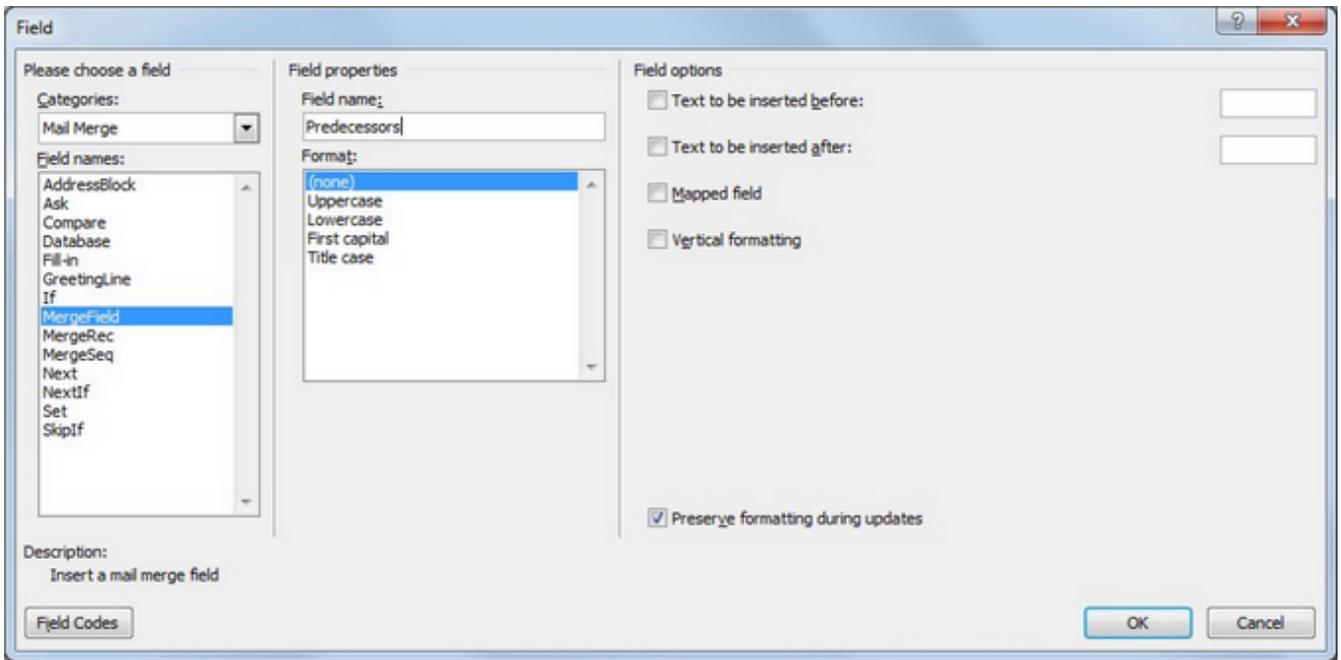
Here are some basic steps for modifying a Word Template to add (or modify) fields. This is not a thorough explanation on how to create a Template from scratch but should give you an idea of how to add and modify fields in an existing Template. We recommend consulting your resident Word expert for further assistance.

Here is an example of how to change a field in the Word Template WBS Dictionary 1.dotx. We will replace the Resource Names field with the Predecessors field. This example uses Microsoft Word 2010.

1. Start Word and open WBS Dictionary 1.dotx.

WBS Dictionary		
<b>ID</b>	<b>WBS</b>	
«ID»	«WBS»	
<b>Task Name</b>		
«Name»		
<b>Duration</b>	<b>Work</b>	<b>Cost</b>
«Duration»	«Work»	«Cost»
<b>Start</b>	<b>Finish</b>	
«Start»	«Finish»	
<b>Resource Names</b>		
«Resource_Names»		
<b>Notes</b>		
«Notes»		

2. Highlight the Resource\_Names field including the left and right brackets.
3. Select the Insert tab, Quick Parts and then Field...
4. In the Field form, select Mail Merge from the Categories drop down list and MergeField from the Field names list.
5. Type Predecessors under Field name. The field name you type here must be a valid WBS Schedule Pro field.



6. Click OK.

7. Rename the Resource Names heading to Predecessors.

WBS Dictionary

ID	WBS	
«ID»	«WBS»	
<b>Task Name</b>		
«Name»		
<b>Duration</b>	<b>Work</b>	<b>Cost</b>
«Duration»	«Work»	«Cost»
<b>Start</b>	<b>Finish</b>	
«Start»	«Finish»	
<b>Predecessors</b>		
«Predecessors»		
<b>Notes</b>		
«Notes»		

7. Save this file with a new name.

You can then select this new file when running the Word Export from WBS Schedule Pro.



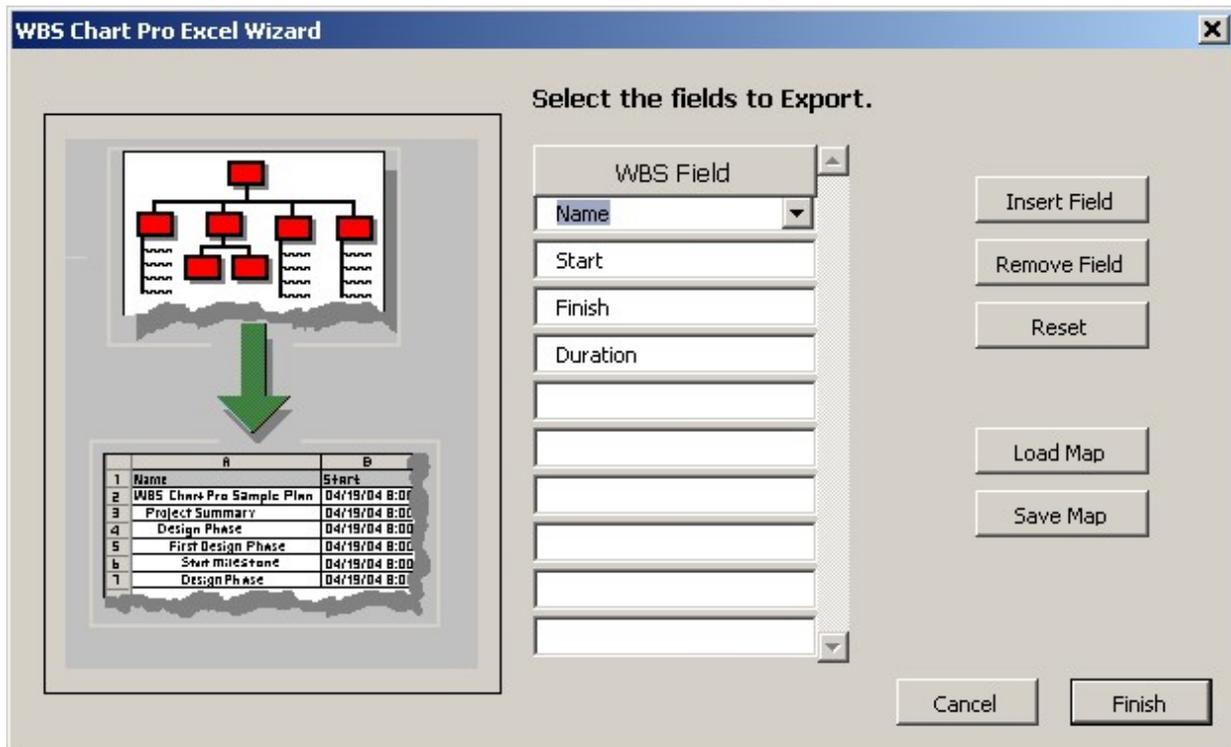
## Exporting to Microsoft Excel

Export project information from WBS Schedule Pro to Microsoft Excel. Define which fields to export using the "Export to Excel Wizard".

Select the Export to Excel Wizard to start the process



Select which fields to export to Excel by listing them in the WBS Field list. Each field listed will appear as a column in Excel.



The data exported to Excel will display Summary Tasks in bold and indent tasks according to the WBS structure in WBS Schedule Pro.

	A	B	C	D
1	Name	Start	Finish	Duration
2	<b>Project Summary</b>	<b>1/1/2011</b>	<b>3/25/2011</b>	<b>60d</b>
3	<b>Design Phase</b>	<b>1/1/2011</b>	<b>2/11/2011</b>	<b>30d</b>
4	<b>First Design Phase</b>	<b>1/1/2011</b>	<b>1/14/2011</b>	<b>10d</b>
5	Start Milestone	1/1/2011	1/1/2011	0d
6	Design Task 1	1/3/2011	1/14/2011	10d
7	<b>Second Design Phase</b>	<b>1/3/2011</b>	<b>2/11/2011</b>	<b>30d</b>
8	Design Task 2	1/3/2011	1/21/2011	15d
9	Design Task 3	1/24/2011	2/4/2011	10d
10	Design Task 4	2/7/2011	2/11/2011	5d
11	End Design Milestone	2/11/2011	2/11/2011	0d
12	<b>Programming Phase</b>	<b>1/17/2011</b>	<b>2/25/2011</b>	<b>30d</b>
13	Program Task 1	1/17/2011	2/4/2011	15d
14	Program Task 2	2/14/2011	2/25/2011	10d
15	End Program Milestone	2/25/2011	2/25/2011	0d
16	<b>Testing Phase</b>	<b>2/28/2011</b>	<b>3/25/2011</b>	<b>20d</b>
17	Test Task 1	2/28/2011	3/4/2011	5d
18	Test Task 2	3/7/2011	3/11/2011	5d
19	Test Task 3	3/14/2011	3/25/2011	10d
20	End Milestone	3/25/2011	3/25/2011	0d

## Importing from Microsoft Excel

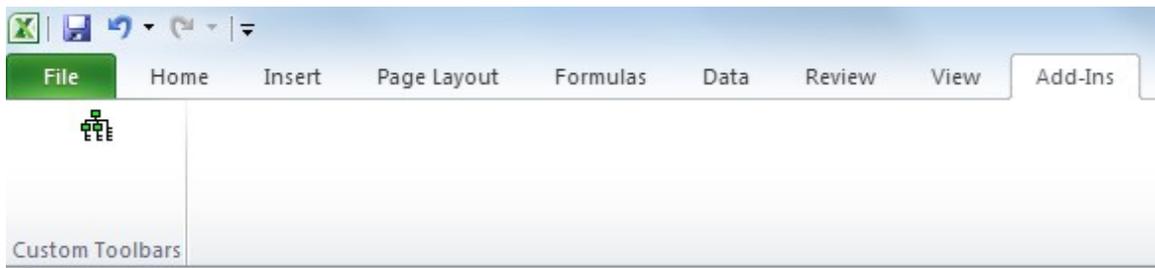
There are two ways to Import information into WBS Schedule Pro from Microsoft Excel. They are:

**Copy and Paste** - This is the easiest approach. Copying data from Excel and Pasting this information into WBS Schedule Pro works well under many circumstances. To use this method, Copy the information from Excel, go to the Task Sheet in WBS Schedule Pro and Paste into the appropriate fields. For this to work, the data being pasted must match the type of field in the Task Sheet cells. In other words, Date data must be pasted into Date fields, etc... Data that does not match will be ignored.

When using Copy and Paste from Excel to WBS Schedule Pro you cannot import a hierarchy into the WBS, Outline Level, Outline Codes or Outline Number fields. To export hierarchical data from Excel and import this into WBS Schedule Pro you must use the next approach.

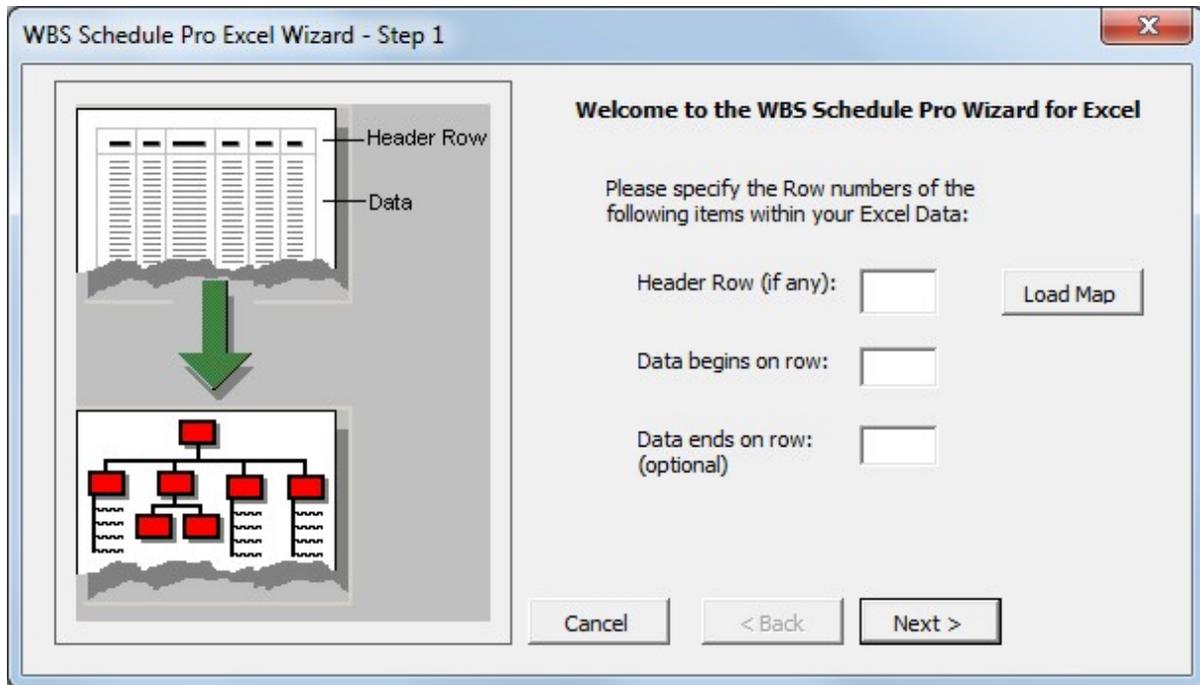
### Using the Excel to WBS Wizard

Import information into WBS Schedule Pro using the Excel to WBS Wizard. The Excel Wizard is an add-in tool installed into Excel that steps you through the process of transferring information from Excel to WBS Schedule Pro.



*The Excel to WBS Wizard button in Microsoft Excel*

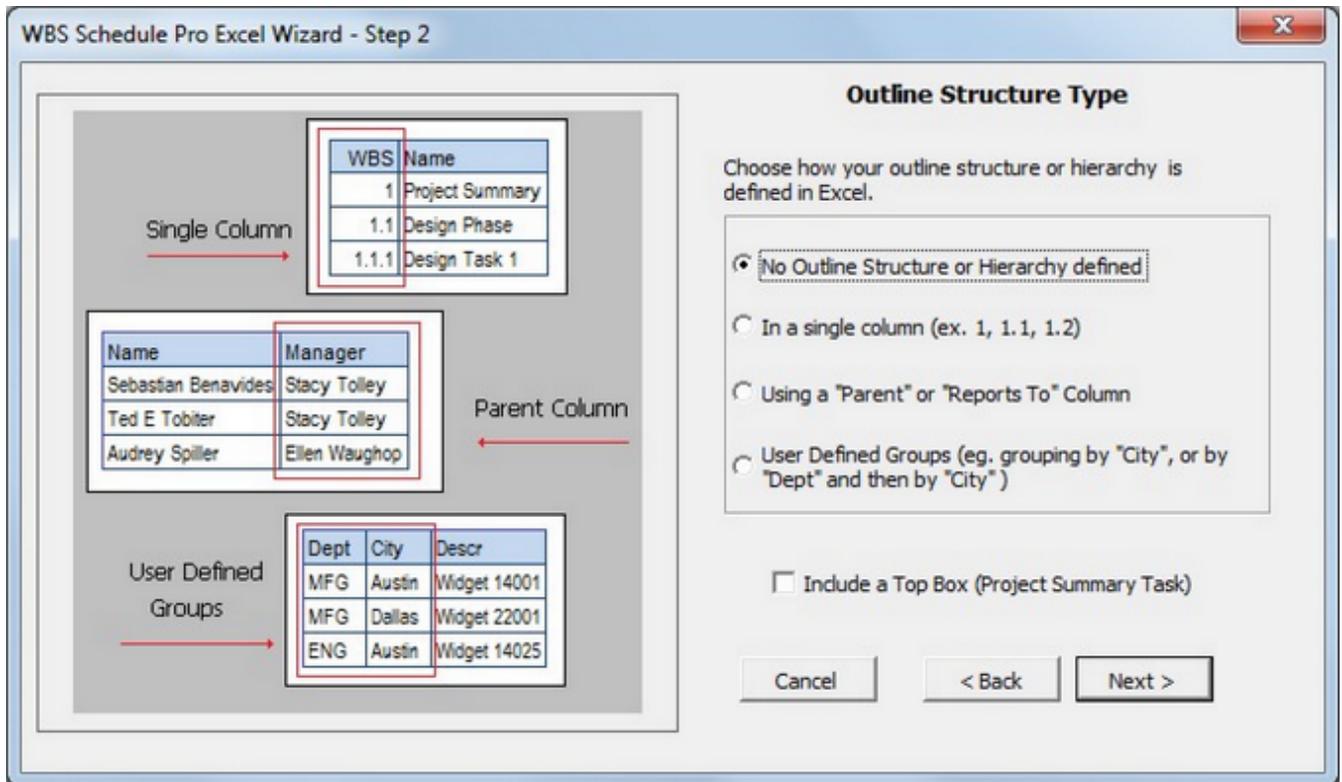
To start the Excel Wizard, open your spreadsheet, click the Add-Ins tab and then the WBS Wizard button. To install this button, go to WBS Schedule Pro, click the drop down arrow below the Excel button and click Setup Excel. The first step in the Wizard is displayed below:



**Header Row** - The header row defines the column data and should match the field names as defined in WBS Schedule Pro. If you have a Header Row, enter the row number or leave it blank if you don't have one.

**Data begins on row** - Enter the row number of the first row of data.

**Data ends on row** - Enter the last row of data. If you leave this blank the wizard will attempt to read all of the data in the spreadsheet. Use this to make the Wizard stop at a specified row. The next step allows you to tell WBS Schedule Pro how your data is structured:



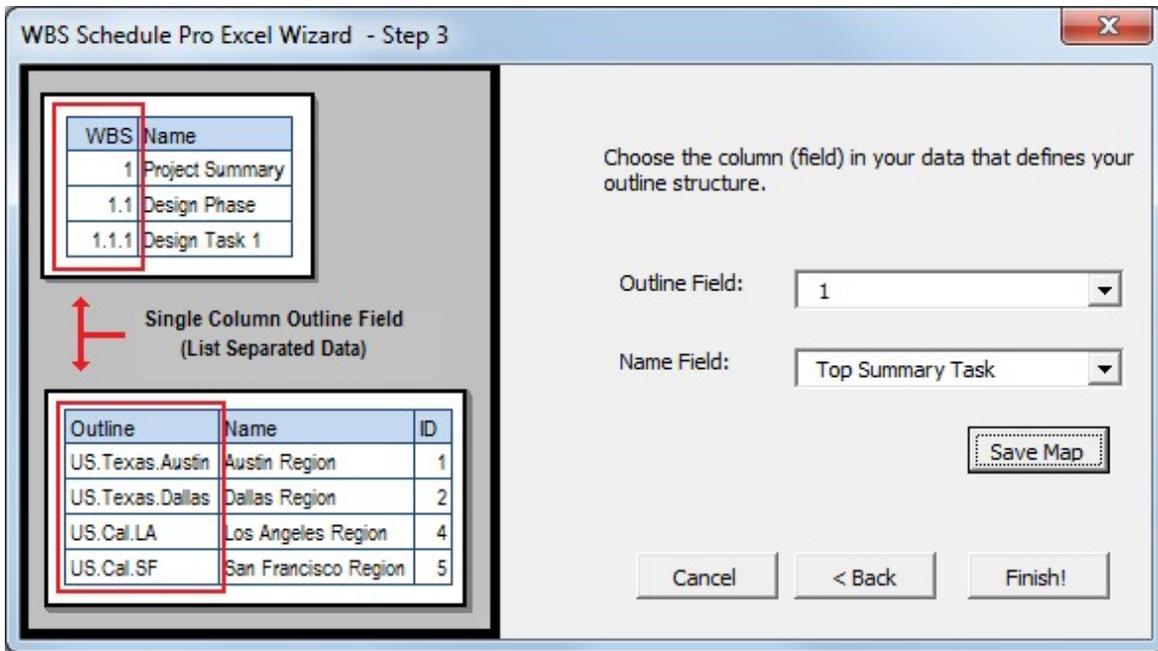
There are four different way to import data depending on how this data is structured. Choose the one that best fits how your data is maintained in the spreadsheet.

1. No Outline Structure or Hierarchy defined - Use this option to import a flat file or data that does not contain any hierarchical information. Examples of this would be when importing a simple list of Tasks with no outlining. For this you might be better off doing a Copy and Paste since you have more control over where you are pasting.

2. In a single column - Use this option when you have one column in your data that defines the hierarchy. An example of this is below:

1	Top Summary Task
1.1	Summary Task
1.1.1	Task 1
1.1.2	Task 2
1.2	Summary Task 2
1.2.1	Task 3
1.2.2	Task 4

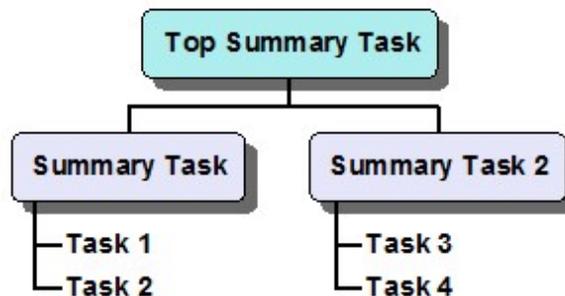
Use the first column to define the "Outline" of your data. WBS Schedule Pro will parse the data for hierarchical information and attempt to define the structure from this data. In the subsequent form you would define the first column as your Outline Field and the second column as the Name field.



The results would look like this in a Task Sheet:

	WBS	Name
1	1	☐ <b>Top Summary Task</b>
2	1.1	☐ <b>Summary Task</b>
3	1.1.1	Task 1
4	1.1.2	Task 2
5	1.2	☐ <b>Summary Task 2</b>
6	1.2.1	Task 3
7	1.2.2	Task 4

Or like this in a WBS Chart:

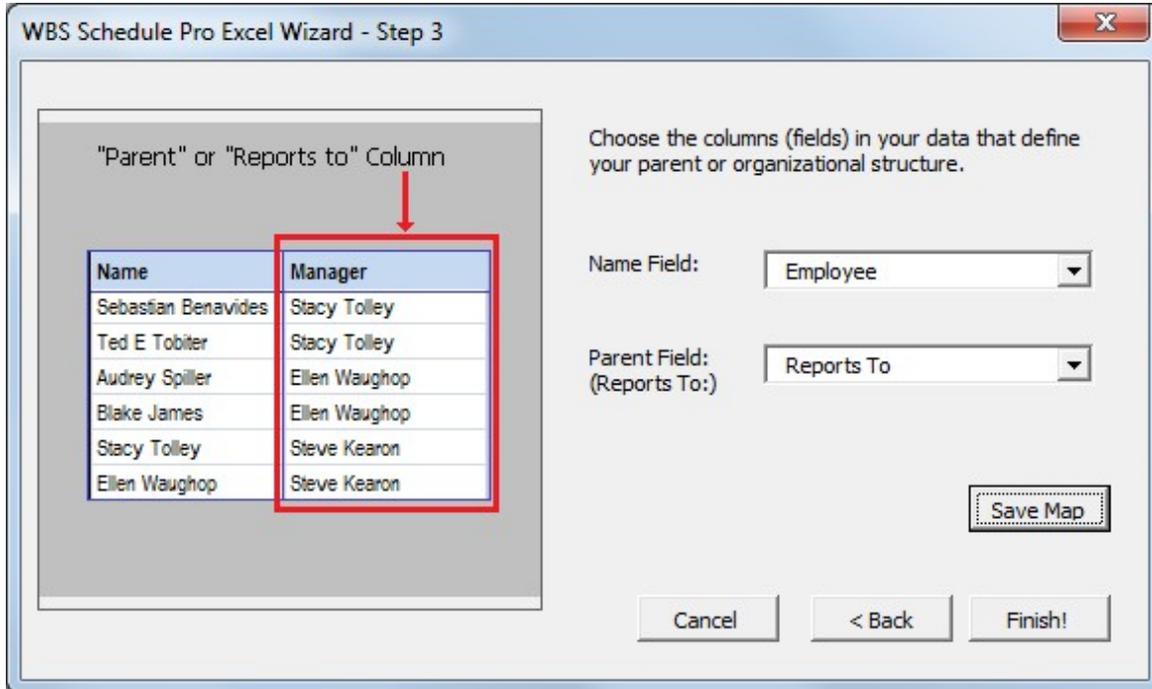


3. Using a "Parent" or "Reports to" Column - Use this option if you have one column that represents the main item and the other representing the parent of this item or if they "Report to" the other item. For example:

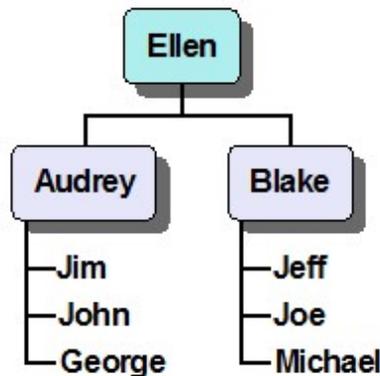
**Employee Reports To**

Jeff	Blake
Joe	Blake
Jim	Audrey
John	Audrey
George	Audrey
Michael	Blake
Audrey	Ellen
Blake	Ellen
Ellen	

Using these options:



Produces this:



4. User Defined Groups - Use this option if you have common values in a field (such as a Text field) and you wish to group by these values. For example, if you had a list of parts, colors and locations such as this:

Name	Color	Location
------	-------	----------

Widget 100	Red	Texas
Widget 200	Green	Texas
Widget 300	Blue	Texas
Widget 400	Blue	California
Widget 500	Red	California
Widget 600	Green	California
Widget 700	Red	California

You would Map the appropriate columns from the spreadsheet to fields in WBS Schedule Pro using the Field Mapping form:

**Field Mapping**

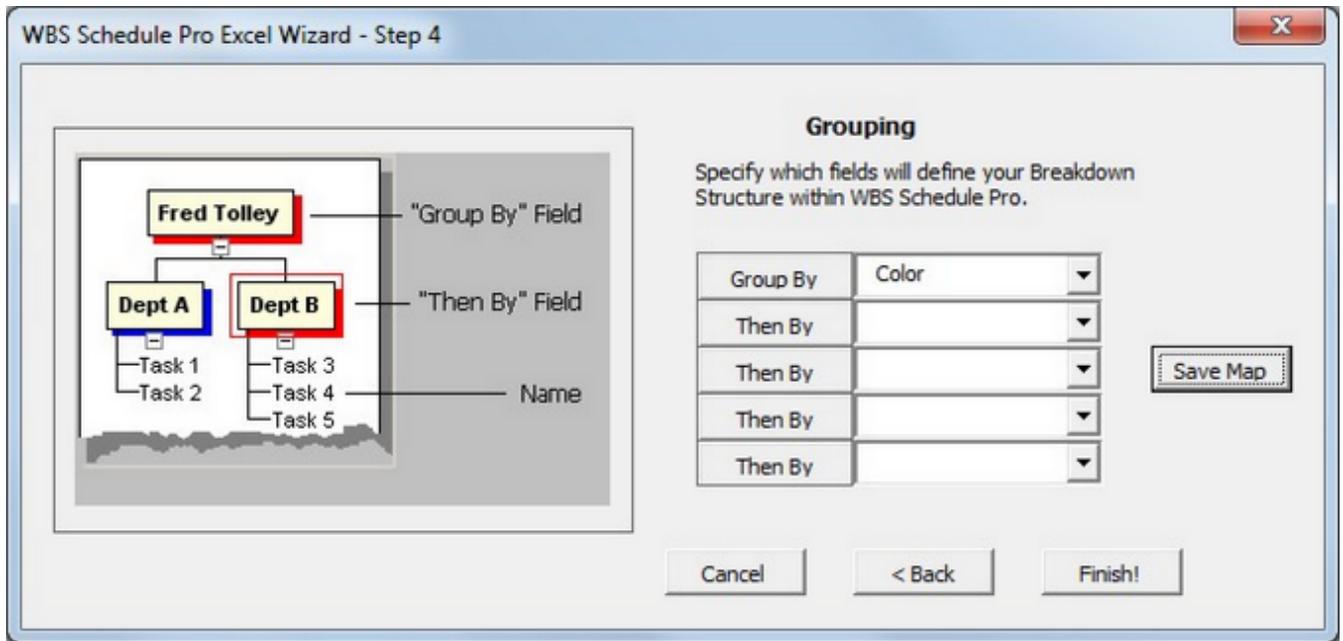
Map the relevant Excel Data Columns to the appropriate WBS Schedule Pro Fields.

- Use the WBS "Name" field to map your data name.
- Map to a WBS "Text" field if you are not sure.
- Specify "(not mapped)" to ignore the data column.
- The Field Title is the User Defined Field Title.

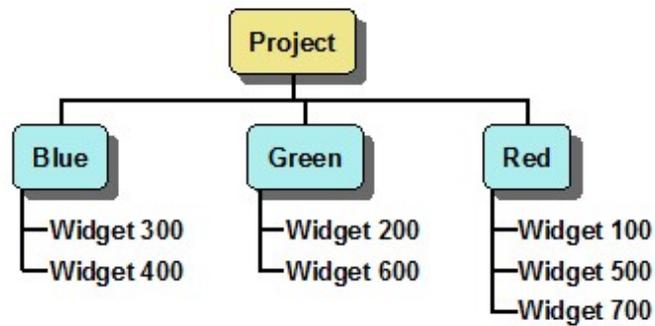
Excel Column	WBS Field	Field Title(Optional)
Name	Name	
Color	Text1	Color
Location	Text2	Location

Cancel    < Back    Next >

Map the Color and Location to the Text1 and Text2 fields in WBS Schedule Pro. The Text fields (Text1-Text30) are spare text-based fields that can be used to hold random information. Then, in the next form, define how to initially Group the data.



To produce a WBS Chart like this:



The ability to import hierarchical information into WBS Schedule Pro is a powerful feature and can be used for more than project management but for displaying any kind of structure data in a Top-Down chart.

## Reference (Detailed Info by Tab)

## File Menu

### New

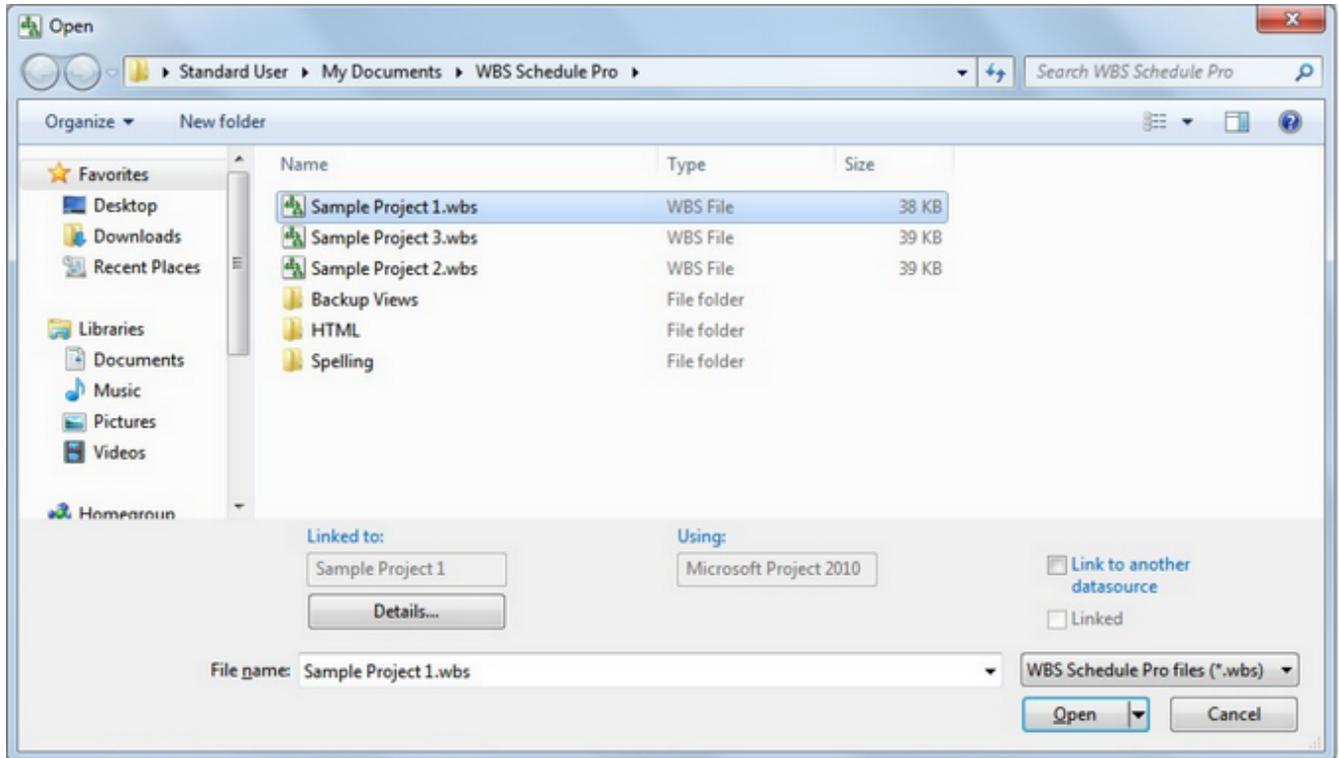
Displays a blank screen for creating a new project.

To create your first task, click the **I**nsert button in the WBS or Network Chart view or type a task name into the Task Sheet.

You can specify which type of View is displayed initially when choosing New by going to File-Options and selecting WBS Chart, Network Chart or Task Sheet in the Initial View Type list.

## Open

Displays the File Open dialog box to open a previously saved file.



File Name - Type the name of the file you wish to open or select from the list of files.

File Types:

WBS Schedule Pro files (\*.wbs) - The list of WBS Schedule Pro files may include standalone WBS Schedule Pro projects or linked projects. If a WBS Schedule Pro file is linked to a datasource file (a Microsoft Project file, for example), it displays the name of this file in the "Linked to" field plus the version of Microsoft Project in the "Using" field if linked to a Microsoft Project file. If you select a WBS Schedule Pro file from the list and the "Linked to" field is empty then this file is a standalone project.

PERT Chart EXPERT files (\*.pce) – Lists all PERT Chart EXPERT files and allows you to open a chart created in PERT Chart EXPERT. Files from PERT Chart EXPERT are converted into a WBS Schedule Pro file and cannot be used again in PERT Chart EXPERT.

Microsoft Project Plans (\*.mpp, \*.mpd) – Lists all Microsoft Project files (.mpp and .mpd). If you open a Microsoft Project Plan in WBS Schedule Pro it opens this file in MS Project (starting MS Project if necessary) and creates a chart of this MS

Project plan.

Microsoft Project XML (\*.xml) – Lists all .xml files. The .xml files must conform to the Microsoft Project XML specification but does not have to be created by Microsoft Project.

MPX (\*.mpx)– Lists all MPX files (.mpx). The MPX file format is a text-based version of a Microsoft Project plan that was the standard way of importing and exporting text-based versions of MS Project plans before the XML format. Some applications still use this format and it is supported in WBS Schedule Pro.

Text (\*.txt, \*.csv) – Lists all Text files (.txt or .csv) and allows you to create a project from a Text file. The text file must be a comma-delimited file, with the first line of the file defining which fields are in the file and the subsequent lines defining the tasks.

Linked to: - Displays the file to which the selected .wbs file is linked. If blank then the .wbs file is a standalone project.

Using: - If the Linked file is a Microsoft Project plan than the version of Microsoft Project that is used to open this project is listed here.

Details... - If the selected .wbs file is linked, this displays the full path to the linked file.

Link to another datasource – If the selected .wbs file is linked to a specific datasource and you need to link this to another datasource then select this option before you open the .wbs file. When selected, you are prompted to pick a new datasource before opening the .wbs file. The .wbs file then becomes linked to this new datasource. This option is useful when you have renamed or moved the datasource and allows a linked .wbs file to “find” its datasource.

Linked - When opening anything other than a Microsoft Project file (.mpp) you have the option to Link to this datasource or open it Unlinked. The difference is determined by whether you want WBS Schedule Pro to calculate the data after the datasource is opened or have WBS Schedule Pro display the data exactly as it is in the datasource.

For example, if you opened an XML file that was created by another Project Management application and you wanted WBS Schedule Pro to display the data exactly as it is maintained in the XML then you would select the Linked option before you opened the XML file in WBS Schedule Pro. This allows WBS Schedule Pro to open the XML and display the Dates, Costs, Hours, etc. exactly as they are in the XML file. Being Linked to the XML file allows you to format charts in WBS Schedule Pro but have the data maintained in the XML file. WBS Schedule Pro may not have the same features or calculate the schedule the same way as the software that produced the XML data.

*Important Note:* When a file is Linked, any changes made to the data in WBS Schedule Pro immediately forces a calculation and Unlinks from the datasource.



## Close

Closes the current project. You are prompted to save if changes have been made to the project since it was opened.

## Save

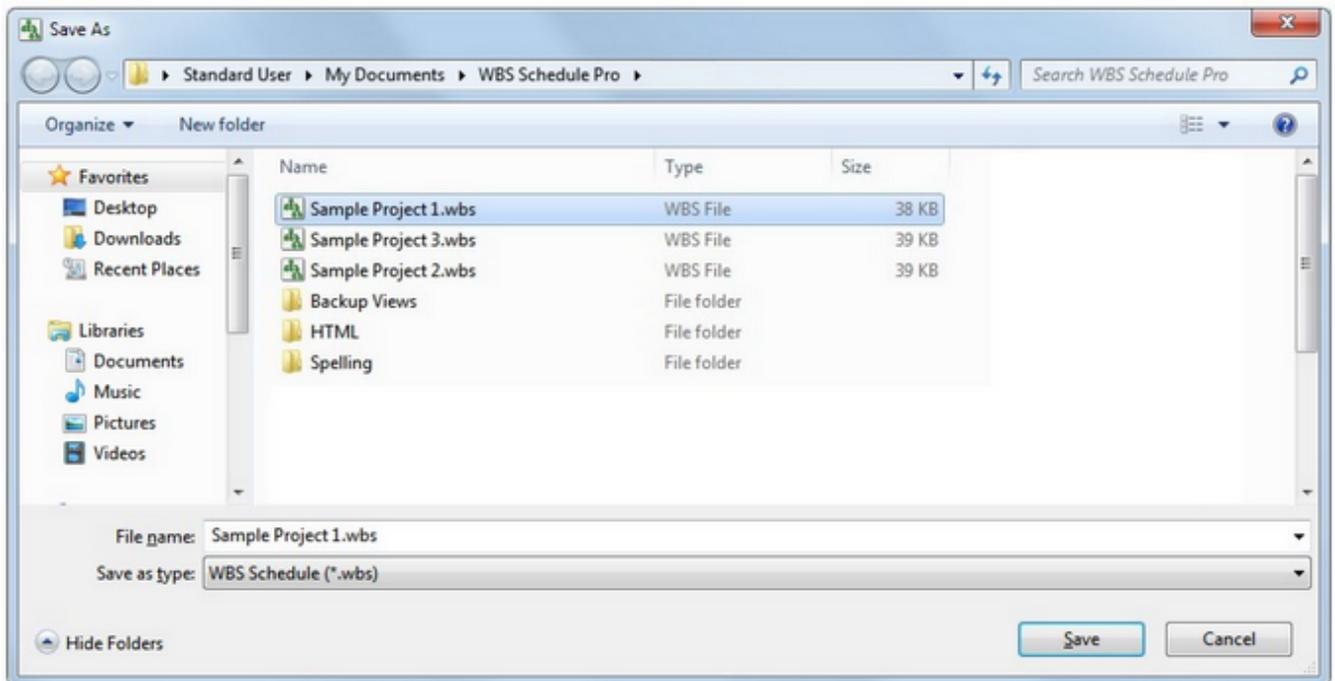
Saves the current project to the same file name. If the project has never been saved it will prompt you for a file name.

To save the current file to a different file name, use the Save As command.

For a complete explanation on Saving WBS charts, see the help topic [Saving WBS charts](#)

## Save As

Displays the Save As dialog box and allows you to confirm saving the current WBS chart to the same file name or allows you to save the file to a different file name. To save the file to another file name, type this new name into the File name field. To save a WBS chart to the same file name and avoid this dialog box, use the Save command.



**File name** - Type a file name for the WBS chart. You do not have to include the .wbs extension as long as the Save as type field displays WBS Schedule.

**Save as type** - Choose the type of file to save. The types of files that can be saved in WBS Schedule Pro are as follows:

**WBS Schedule (\*.wbs)** – Saves the current project to the file name specified with a .wbs extension. A WBS Schedule Pro file may be Standalone or Linked. If you have created the project from scratch in WBS Schedule Pro then it saves all task data and formatting information into a self-contained Standalone .wbs file. If you have created the WBS Schedule Pro project from a datasource (such as a Microsoft Project plan), saving the project stores only the formatting information into the .wbs file with a reference to the datasource where the task data is stored (eg: the Microsoft .mpp file). This .wbs file is then Linked to the datasource.

You do not need to specify whether to save the WBS chart Standalone or Linked, this is determined automatically based on whether you created the WBS chart from

scratch or created the WBS chart from a datasource.

Microsoft Project XML (.xml) – Saves the current WBS Schedule Pro project formatted to the Microsoft Project specifications for XML files. This .xml file can be opened in Microsoft Project or other applications that can read Microsoft Project XML files.

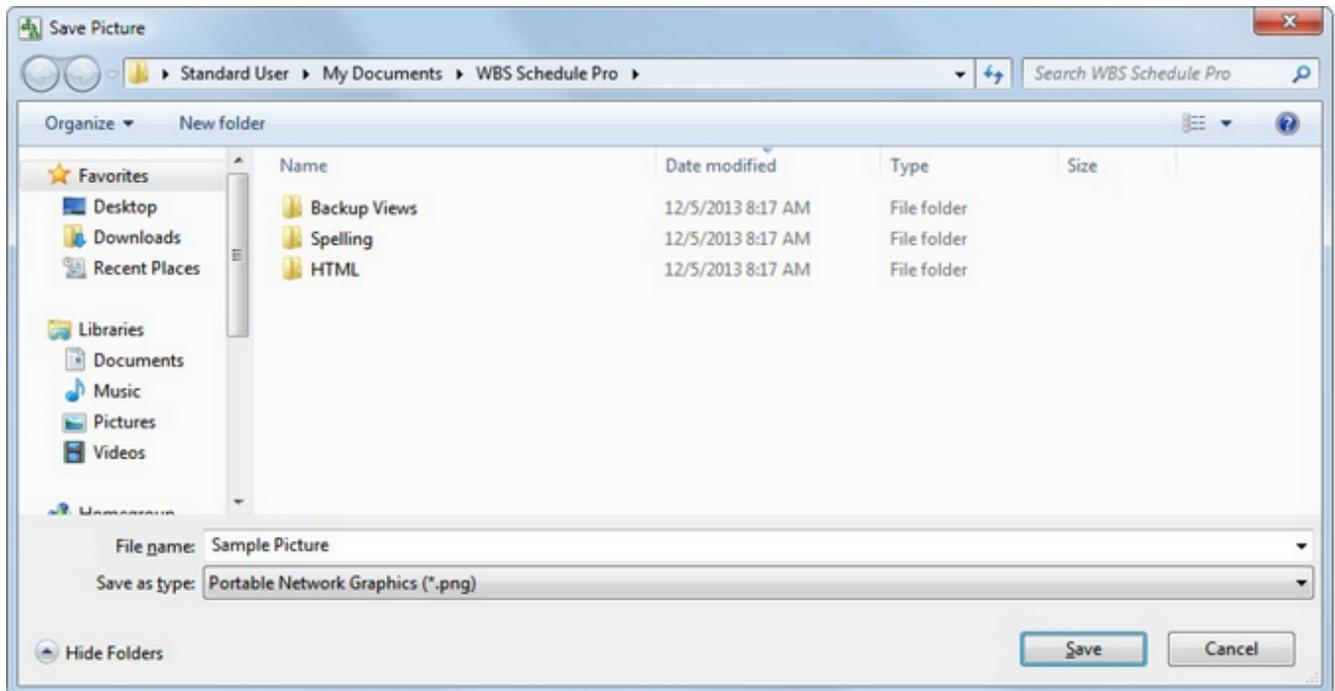
MPX – Saves the current WBS chart to a .mpx file. The MPX file format is a text-based version of a Microsoft Project plan that was the standard way of importing and exporting text-based versions of MS Project plans before the XML format. Some applications still use this format and it is supported in WBS Schedule Pro.

MPX(for P3) – Saves the current WBS chart to an MPX file format for Primavera P3.

For more information on Saving WBS Schedule Pro projects, see the help topic [Saving Projects](#)

## Save As Picture

Saves the current chart to a picture file.



File name - Type in the name of the file.

Save as type - Select to save the picture to the various types of file formats. For best results we recommend using the Windows Enhanced Metafile (\*.emf) format. This scalable format is better for pasting images into other applications such as Word or PowerPoint. If you need to use a different format, try the .PNG format.

## Save As Web Pages

Saves the current chart to a web page in the listed folder using the selected template.

The Save As Web Pages feature allows you to save the current WBS or Network Chart image and incorporate this image into a pre-defined Web Page. We provide a basic template for this purpose. You can modify this template in a text editor or HTML editor. The WBS Schedule Pro program is not intended to be an HTML Editor so you should be familiar with HTML editing to modify the Template.

Note: See the file, WBS HTML Commands.txt, for additional information on the WBS Schedule Pro Template commands. This file was copied into the WBS Schedule Pro program folder during Setup.

The basic concepts for saving WBS charts to a Web Page are:

1. Create and configure your WBS or Network Chart.
2. When you want to publish this chart, select the File menu and Save as Web Pages.
3. Select the template. If you have created your own or modified an existing template, select it in the field provided.
4. Select the Folder to save the HTML pages.
5. Choose the other options if necessary.
6. Click OK. This will generate the HTML pages. Unless the chart is very small or you have modified the template to produce one output page, there may be several pages of HTML output. Since Browsers are not made to handle large scrollable pages, WBS Schedule Pro will break up the chart into as many pages as it needs to output the entire chart.

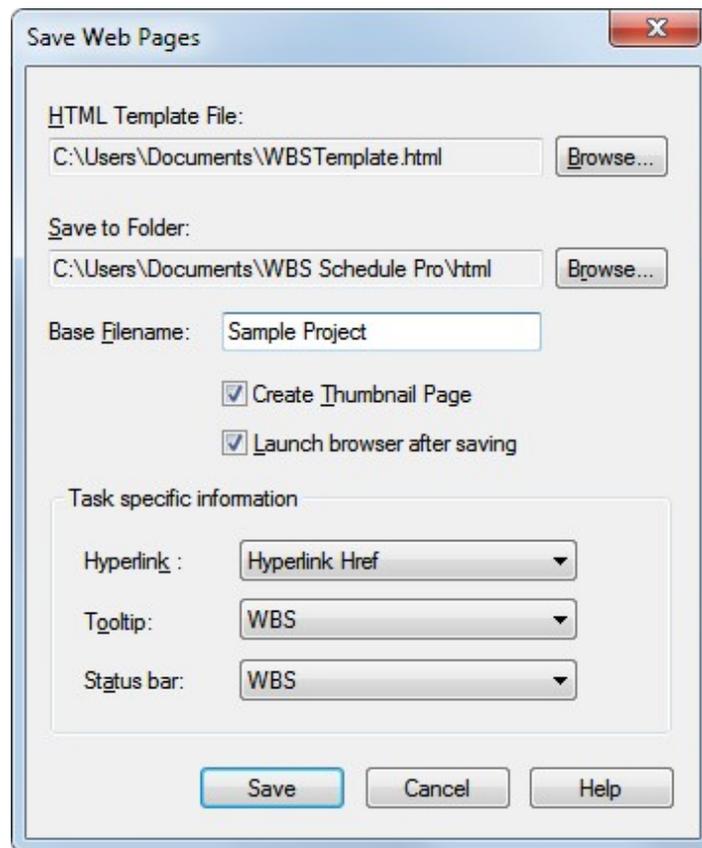
If you have selected to open your browser upon creation of the Web Pages then the first page of your output will be opened automatically. If you chose not to open your browser upon creation of the Web Pages, you need to open the first page of the HTML output in your browser. The standard template contains buttons for scrolling the HTML documents Left, Right, Up and Down, so that if you open the first page of the output you can scroll through each page of your HTML output.

If you want to increase or decrease the size of the image in each output page you can edit the WBSTemplate.html file and increase/decrease the numbers in the line that reads:

```
WBSChart: chart width="975" height="490"
```

If you want the Save as Web Pages feature to produce one big WBS chart in the HTML

document, select the WBS\_Template2.html file in the Save as Web Pages dialog box. This template does not specify the Width and Height of a chart but produces one WBS chart image in the HTML document.



**HTML Template File** - Specify the Template to use for formatting the HTML page. The basic template file is WBSTemplate.html. See the WBS Schedule Pro folder for other available template files.

**Save to Folder** - Saves the HTML output to this folder.

**Base Filename** - Specifies the name that all of the HTML files will start with. If more than one HTML file is created the subsequent files will be named with the Base Filename plus the number of the file (Base Filename1, Base Filename2, and so on).

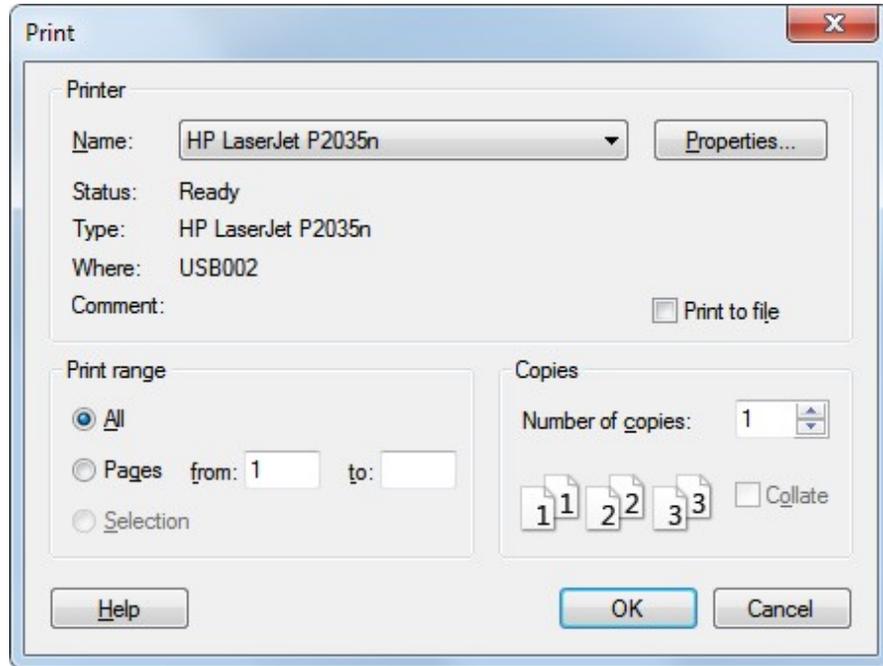
**Create thumbnail page** - Select to include an initial HTML page that contains small representative pictures of the different pages of the WBS chart as they would appear in the different HTML documents. The thumbnail page will be the first page of the set of files and when opened in a browser you can see the overall layout of the WBS chart in small tiles. Click an image in the thumbnail to go to that HTML page.

**Launch browser after saving** - Select to launch your default browser after you press the Save button. This starts the browser and loads the first page of the HTML output.

Task specific information - Select a field in Hyperlink to jump to the specified email/website/document address if that field contains a valid address. For example, if you listed an email address in the Text1 field and displayed the Text1 field in your WBS chart, then you could choose the Text1 field in the Hyperlink field and jump to this when selected in your chart embedded in the HTML page. Select a field in Tooltip to display when you hover over a box in the WBS chart embedded in the HTML page. Select a field to display in the Status bar at the bottom of the browser as you hover over a box in the chart embedded in the HTML page.

## Print

Select options before printing. Once you select the appropriate options, pressing OK will initiate the print.



## Printer

Name – Lists the printers that are set up on your computer.

Status – Shows information about the selected printer.

Type – Displays the type of printer currently selected.

Where – Shows which printer port the printouts will be routed through.

Comment - Shows information about the selected printer.

Properties – Select to set up options for the selected printer. The options available depend on the features of the printer.

Print to file – Prints the chart to a file. The Print to file option is a holdover from earlier days of computing. It doesn't work easily on more common USB printers. You can accomplish many of the same goals by creating a PDF.

## Print Range

All – Select to print the entire chart.

Pages from x to y – Select to print a certain range of pages.

Selection – This option is not currently supported in WBS Schedule Pro.

#### Copies

Numbers of copies – Specify the number of copies that you want to print.

Collate – If you have selected more than one copy, specifies whether you want the copies to be collated.

## Print Preview

Displays a sample of what the chart will look like when printed. Print Preview uses the currently selected printer and paper size to display the chart as it will appear when printed.

The information in the lower left corner of the Print Preview window displays useful information regarding the printout. For example, it might display

Scale - Page: 1 of 10 Size: 2 rows by 5 column Scale: 100%

This means that you have selected the "Adjust to" option in Page Setup, it is currently displaying Page 1 of this 10 page chart. The printout is 2 rows and 5 columns of paper and the Scale is 100% as set in the Page Setup dialog box under Scaling.

In the Print Preview window, you can:

**Scroll** – On a multiple page printout, the buttons in the upper left corner of the Print Preview window allow you to scroll through the different pages of the printout. Click the Left, Right, Up and Down buttons to scroll (a button is only selectable if you can scroll in that direction).

**Select a One Page or Two Page window** – The One / Two Page button allows you to display the Print Preview window in a single page or double page view. Two pages is the most you can see at a time in Print Preview. If you want to see more than two pages at once, close Print Preview and select View-Page Layout. This displays the entire chart including page breaks (but without the fields around the page as is shown in Print Preview).

**Zoom In and Out** – The Zoom and Zoom out buttons allow you to see more or less detail in the chart. You can also click anywhere on a page to Zoom In and Out.

**Print** – Select the Print button to send the chart to the printer. You can also set printer options by clicking the Print button. See also [Print](#)

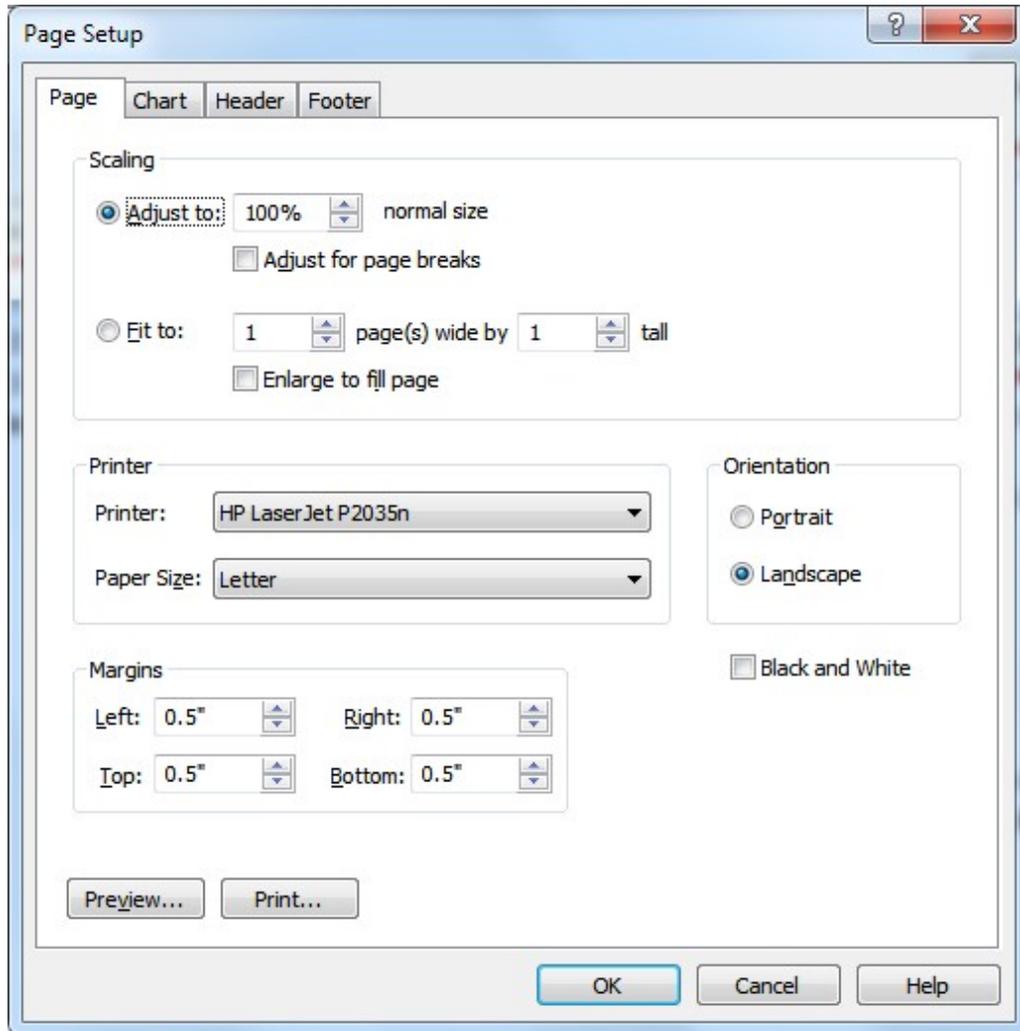
**Page Setup** – Select the Page Setup button to change paper size, print orientation, margins and to change the Page Layout used for this chart. See also [Page Setup](#)

**Summary Info** – Select the Summary Info button to display the Project Properties dialog, where you can enter information like Title, Manager, Company, etc. See also [Properties](#)

**Note:** You cannot edit the chart in the Print Preview window, however, if you close Print Preview and choose View-Page Layout, you can see (and edit) the chart including where the page breaks appear.

# Page Setup

## Page



The options in the Page tab are saved with the project and are not specific to any View. All views will use the options set in the Page tab.

### Scaling

**Adjust to x% normal size** – Reduces or enlarges the printed chart. Select 100% if you do not want to reduce or enlarge the chart. When set to 100%, the chart prints to as many pages as necessary depending on the font styles, spacing between boxes, and other chart characteristics. Decreasing this number shrinks the chart and increasing this number enlarges the chart by the percentage specified.

**Adjust for page breaks** – Repositions boxes that fall on a page break onto the next page. Using the Adjust for page breaks option may make your charts bigger since it needs to add space to avoid page breaks.

Fit to  $x$  page(s) wide by  $y$  tall – Forces the chart to the specified number of pages. Use the “Fit to page” option (without selecting Enlarge to Fill Page) to shrink the chart proportionally by entering a number of pages smaller than it would normally need.

To increase the size of the chart to the specified number of pages, select the “Enlarge to fill page” option along with the “Fit to page” option and enter a number of pages more than it would normally need.

Note: When using the Fit to  $x$  page wide by  $y$  tall option there is no corresponding “Adjust for page breaks” option. Since the “Fit to Page” option is forcing it to a certain number of pages it would be impossible to impose the extra space necessary to “Adjust for page breaks”.

Enlarge to fill page – Automatically increases the size of the chart to fill the remaining space in the printout until it reaches one edge of the chart (width or height). For example, suppose your chart is normally  $1\frac{1}{2}$  pages wide and  $\frac{1}{2}$  page tall. If you select Fit to 2 pages wide by 1 page tall and Enlarge to fill page, WBS Schedule Pro enlarges the chart until either the chart is a full 2 pages wide or 1 page tall, whichever is reached first. WBS Schedule Pro only increases the size *proportionally* so once it reaches the edge of the page it stops enlarging.

## Printer

Printer – Select a printer from the list of currently installed printers.

Paper Size – Select a paper size from the list of sizes that your printer supports. If your printer supports a different size than what is listed try going to the Control Panel and define a “Custom Size” for your printer. You should then be able to choose this custom size from this list.

## Orientation

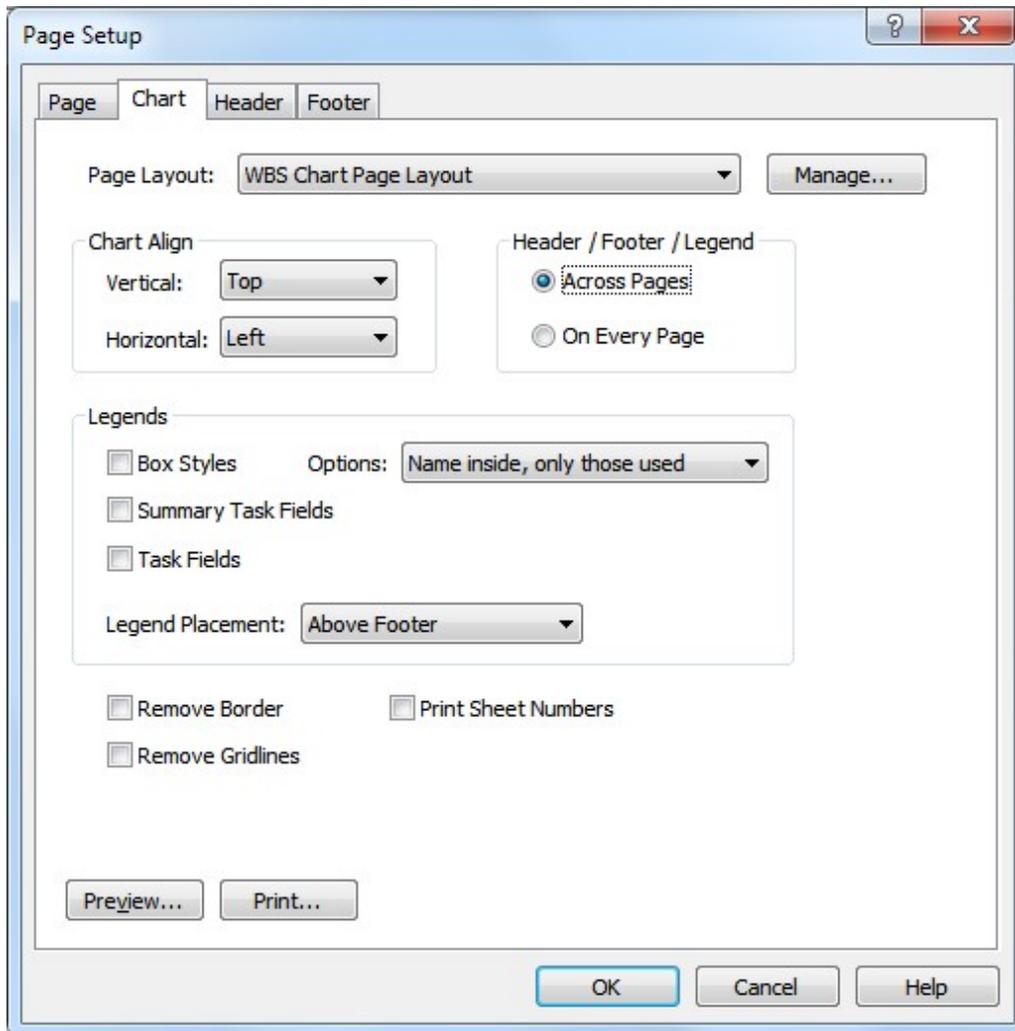
Portrait – Select to print the chart in Portrait mode.

Landscape – Select to print the chart in Landscape mode.

Margins - Specify the distance between the left/right/top/bottom edge of the page and the first printed data.

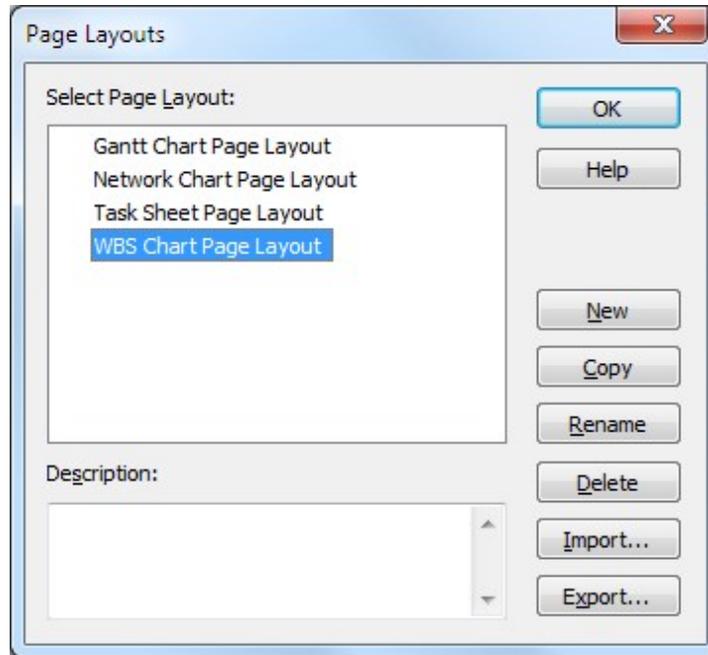
Black and white – Converts the colors in a chart to black and white. All text, lines and shadows are converted to black and all fills are converted to white. This option is useful if you want to print a color chart to a black and white printer and you do not want to convert the colors to shades of gray.

## Chart



Page Layout – Select a Page Layout from the list of layouts. Page Layouts save information from the Chart Tab, Header Tab and Footer Tab into an external file that can be used in other Views in this and other projects. It allows you to set up a standard way to display information on a page. The Page Layout selected is saved with the current View. For example, you could have all your WBS charts use the same Page Layout or each WBS chart use a specific Page Layout.

Manage - Select this option to create a New Page Layout, Copy, Rename, Delete, Import or Export a Page Layout.



## Chart Align

Vertical - Aligns the chart to the Top, Middle or Bottom of the page.

Horizontal - Aligns the chart to the Left, Center or Right side of the page.

Header / Footer / Legend - Select Across Pages to display the Header, Footer and/or Legend spanning all the pages in the chart. Select On Every Page to display the same Header/Footer and/or Legend on each page of the chart. The On Every Page option support page numbering in the Header and Footer. The Across Pages option does not support Page Numbering since it is really one big page spread out across multiple sheets of paper. To number the pages using the Across Pages option select the Print Sheet Numbers option.

## Legends

Box Styles - Displays a legend for the Box Styles defined in Format-Boxes for WBS and Network charts.

Options - Select the following to use with the Box Styles option:

Name Inside - Displays the style of box inside a box in the legend. This option displays every box style defined even if it not used in the chart.

Name Inside, only those used - Displays the style of box inside a box in the legend but only for those styles used in the chart. For example, a Milestone or Non-Critical box style will not be displayed in the legend if there are no Milestones or Non-Critical Tasks in your project.

Name Outside - Displays the style of box outside the box in the legend. This option displays every box style defined even if it not used in the chart.

Name Outside, only those used - Displays the style of box outside a box in the legend but only for those styles used in the chart. For example, a Milestone or Non-Critical box style will not be displayed in the legend if there are no Milestones or Non-Critical Tasks in your project.

Summary Task Fields - Displays a legend of the Fields defined for the Summary Tasks in the project. These are the defined in Format-Fields-Summary Tasks for WBS charts and Format-Fields for Network charts. This does not apply to Task Sheets.

Task Fields - Displays a legend of the Fields defined for the Tasks in the project. These are the defined in Format-Fields-Tasks for WBS charts and Format-Fields for Network charts. This does not apply to Task Sheets.

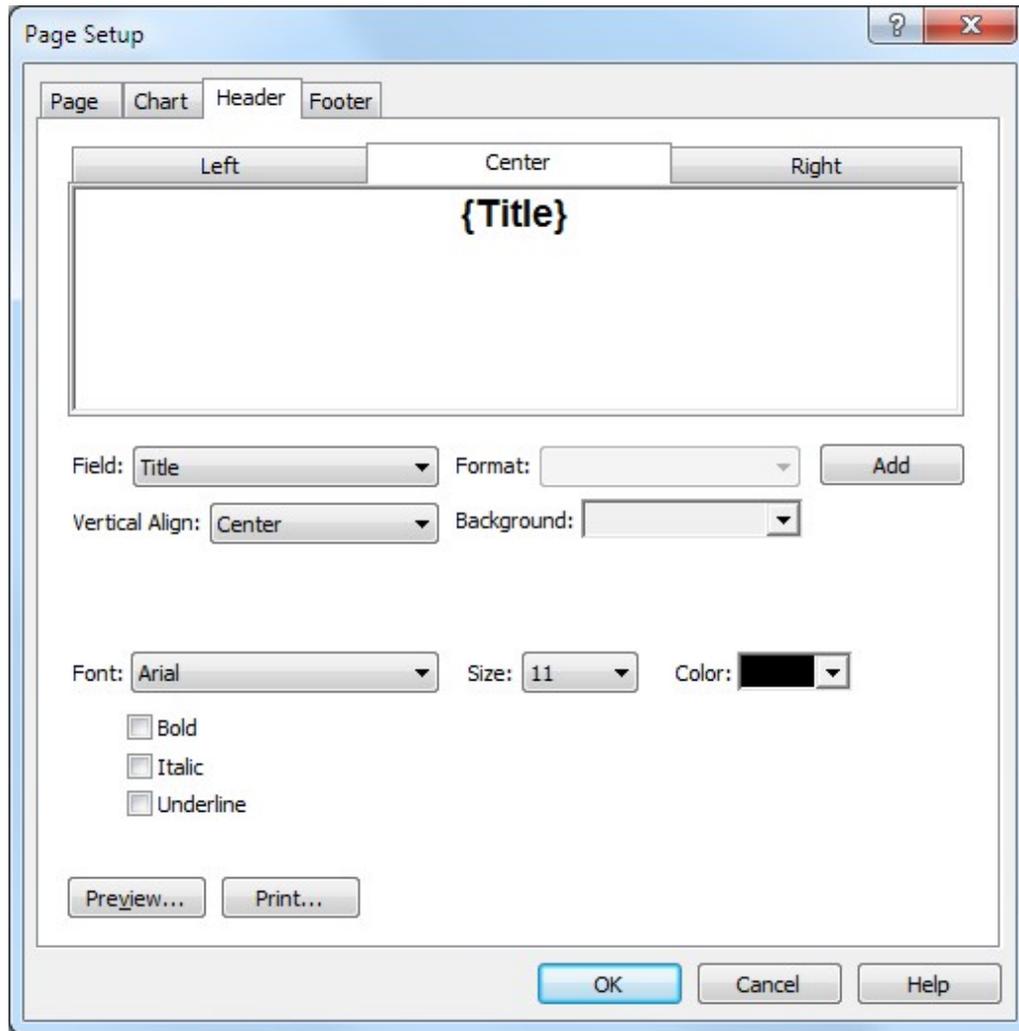
Legend Placement - Displays the legend directly Above the Footer at the bottom of the chart, Below the Footer at the bottom of the chart or Combined with Footer (to the left of the footer) at the bottom of the chart.

Remove Border - Removes the border that surrounds the outside of the chart.

Remove Gridlines - Removes the Gridlines between headers, footers and/or legends.

Print Sheet Numbers - Prints a number corresponding to each page in the printout. This option works best if you are displaying the Header, Footer and/or Legend across all pages. See above.

## Header



Left/Center/Right – Click the appropriate tab to add information on the Left, Centered or on the Right side of the page. You can type information directly into these fields or add Fields such as Title, Manager, Date or Page Numbers. To add a field, select a field from the Field drop down list and press the Add button. Some fields such as Page Numbers or Date fields have formatting options that you can select using the Format drop down list. To modify a field, click inside the field name in the tab, modify the Format or Field and press the Change button to update how the information is displayed.

Font - Highlight the text in the tabs to change the font styles.

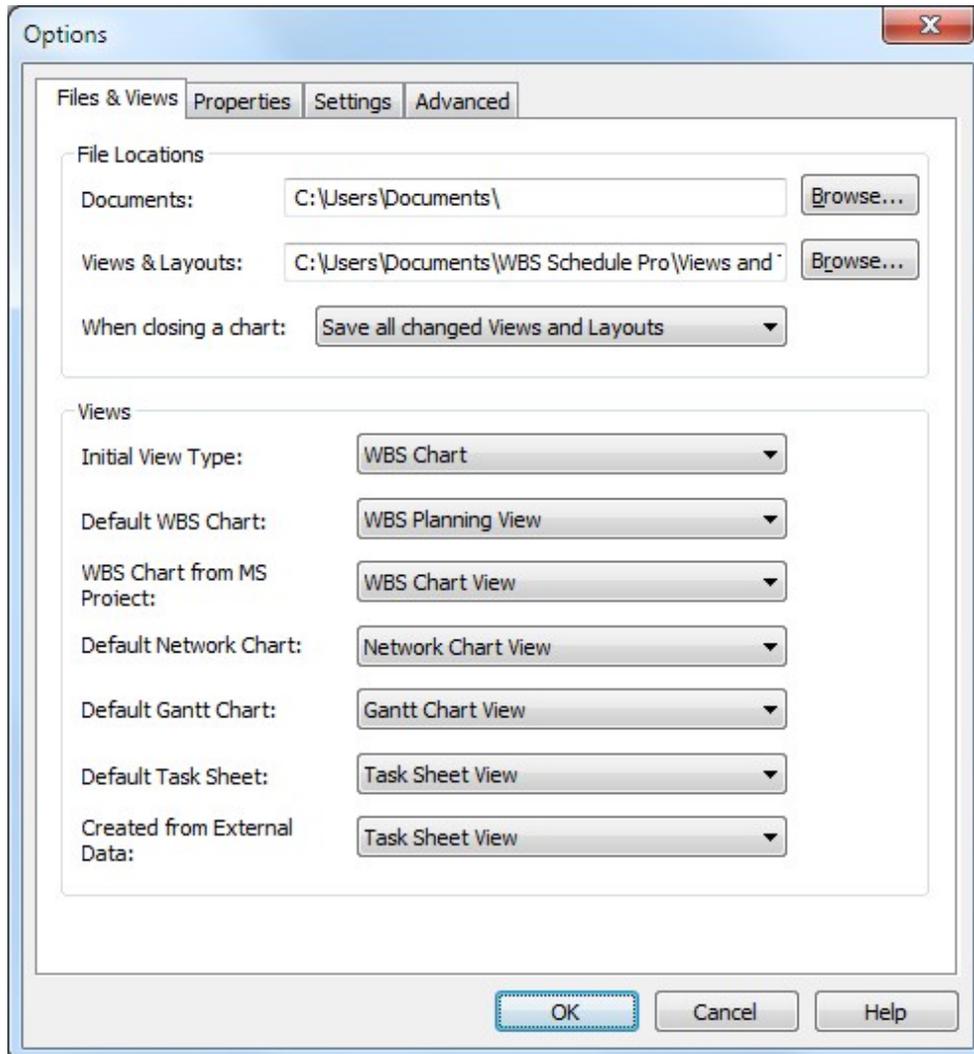
Footer

See Header

## Options

### Files & Views

Specify the default locations for Documents, Views and Layouts, and the Views to use when starting new projects or creating projects from an external data source.



### File Locations

**Documents** – Specify the default location to store and retrieve your projects. Select the Browse button to select a different Folder. By default, this is initially set to the WBS Schedule Pro subfolder of your Documents folder.

**Views & Layouts** – Specify the default location to store the Views and Page Layouts used in WBS Schedule Pro. By default, this is initially set to the WBS Schedule Pro subfolder of your Documents folder. Whenever a new project is

created all of the Views and Page Layouts are copied from this folder into the WBS chart.

When closing a chart – Specify how Views and Page Layouts are saved when closing a project. This option determines whether or not to overwrite the Default Views stored in the Documents\WBS Schedule Pro folder and is independent of whether or not you save your project. Saving your chart always saves the Views within the project.

Choose one of the following options when closing a project:

Save all changed Views – Automatically saves all of the changed Views and Page Layouts in the project back to the WBS Schedule Pro folder. Any new projects you create will use these new Views and changed Page Layouts.

Do not save changed Views – Discards changes made to the Views and Page Layouts and does not overwrite the Views and Page Layouts in the WBS Schedule Pro folder. Saving your project always saves the Views and Page Layout within the project.

Prompt to save changed Views – Prompts you to save any changed Views and Page Layouts each time you close a project. You then have the option to Save or Discard the changes to the default Views and Page Layouts each time you close a project.

If you accidentally save a View over the default View and wish to restore it back to its original state you can copy the original View from the Backup Views folder. The Backup Views folder is a subfolder of Documents\WBS Schedule Pro.

## Views

Initial View Type - Specify the type of View to open when WBS Schedule Pro is first started. Choose from WBS Chart, Network Chart or Task Sheet.

Default WBS Chart - Specify which WBS Chart View to open when WBS Schedule Pro is first started. The default is WBS Planning View as this view is best suited for planning new projects.

WBS Chart from MS Project – Specify which WBS Chart View to use when creating WBS Charts from MS Project. The default is WBS Chart View as this view looks better for displaying existing projects.

Default Network Chart - Specify which Network Chart View to use when displaying Network Charts.

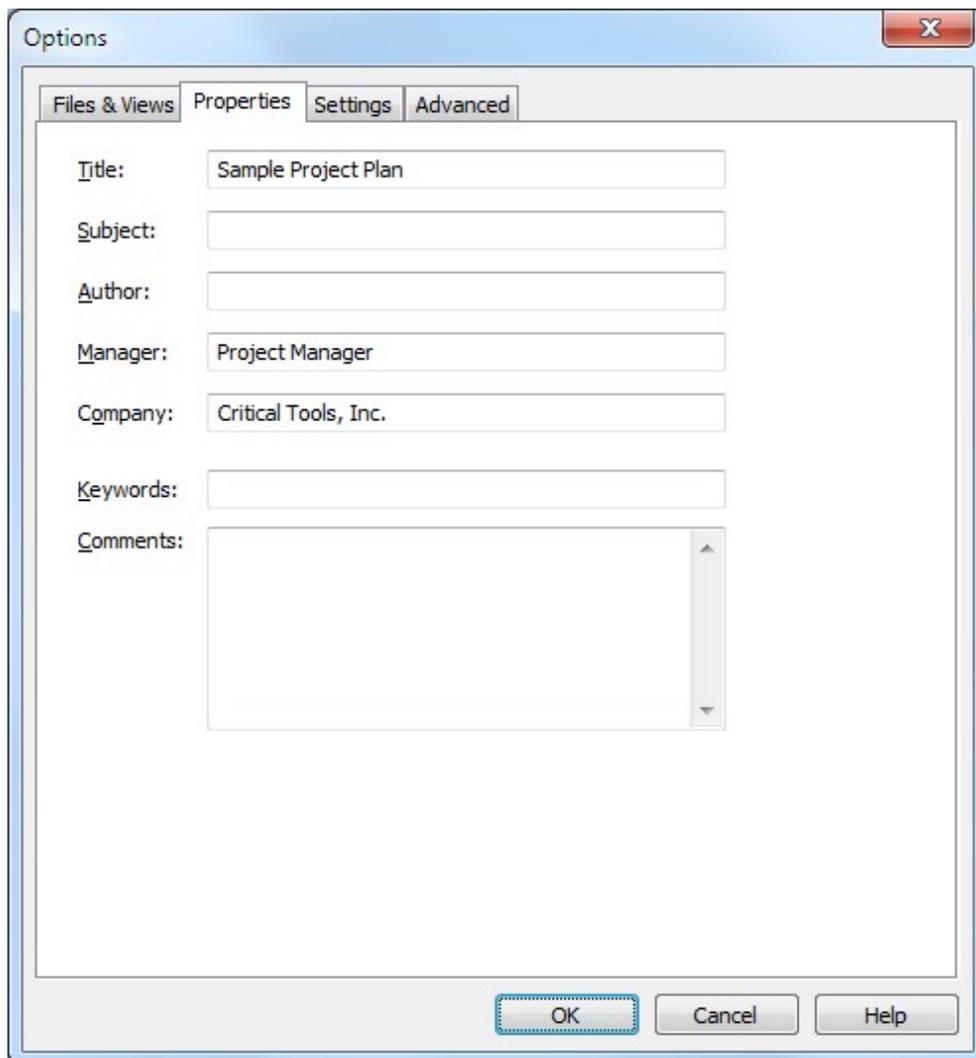
Default Task Sheet - Specify which Task Sheet View to use when displaying Task Sheets.

Created from External Data – Specify the View to use when creating charts from an external datasource. You may want to have a different View when creating charts from an external datasource (like Microsoft Project) as opposed to when you create a new chart.

## Properties

Set the Properties in the various fields. These fields can then be displayed in printouts or in a saved web page.

The fields in Properties are similar to the options in Microsoft Project (under File-Properties). If you enter them in Microsoft Project they also appear here in WBS Schedule Pro when you create a chart from Microsoft Project. If you enter the Summary data in WBS Schedule Pro first and then create a Microsoft Project plan from this WBS chart then this information is transferred to the Microsoft Project plan.



The image shows a screenshot of the 'Options' dialog box in WBS Schedule Pro, with the 'Properties' tab selected. The dialog box has a title bar with 'Options' and a close button (X). Below the title bar are four tabs: 'Files & Views', 'Properties', 'Settings', and 'Advanced'. The 'Properties' tab contains the following fields:

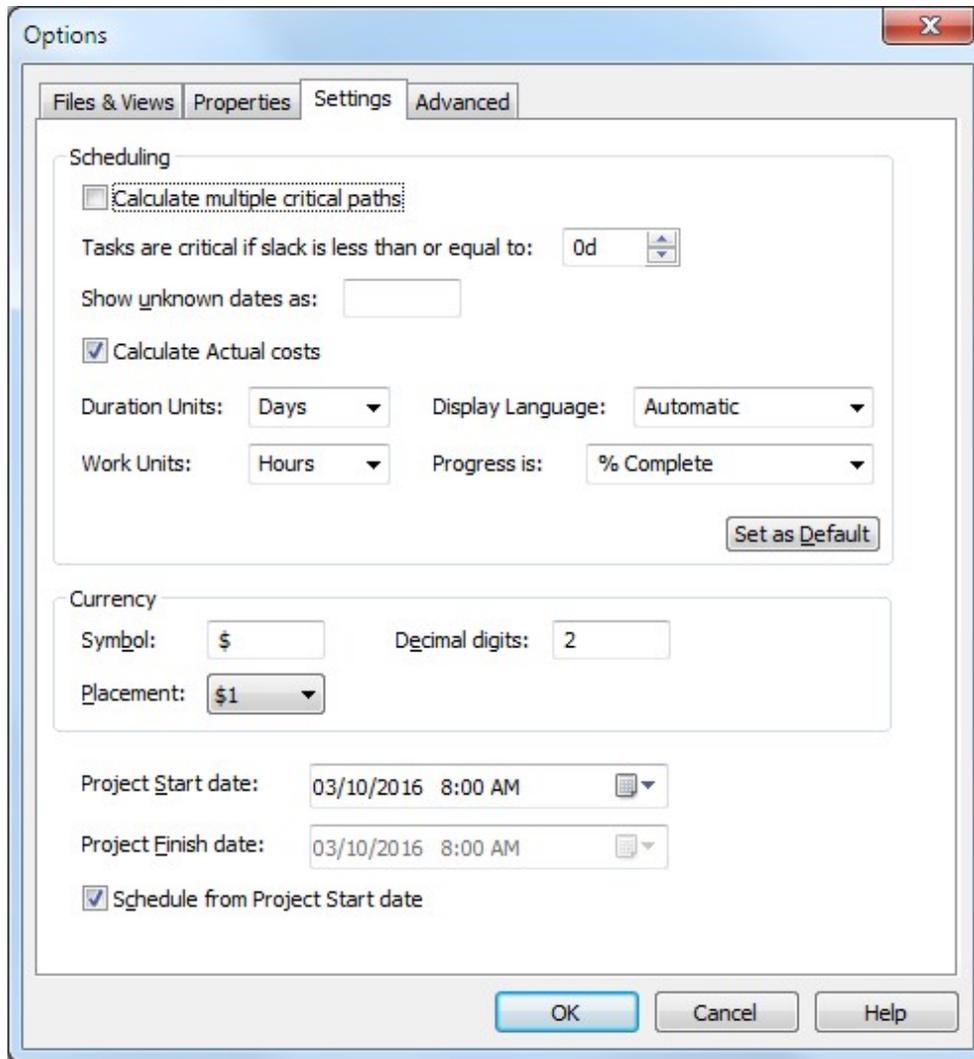
- Title:** Sample Project Plan
- Subject:** (empty)
- Author:** (empty)
- Manager:** Project Manager
- Company:** Critical Tools, Inc.
- Keywords:** (empty)
- Comments:** (empty text area with a vertical scrollbar)

At the bottom of the dialog box are three buttons: 'OK', 'Cancel', and 'Help'. The 'OK' button is highlighted with a blue dashed border.

Hint: You can also enter this form while you are in Print Preview by selecting the Properties button.

## Settings

Modify the settings for the current project.



## Scheduling

**Calculate multiple critical paths** – Select this to have WBS Schedule Pro calculate the critical path to each end point in the project. Each network of tasks (a single task is considered a single network) will calculate its own critical path rather than to a common end point.

**Tasks are critical if slack is less than or equal to:** – Set this to the slack amount you wish to use to calculate whether a task is critical or not. By default, a task is considered critical if it has 0 (zero) slack. You can change this to a higher or lower amount.

**Show unknown dates as** – Converts any unknown date in a date field to the

specified value (or converts the unknown date to a blank if this field is left blank). This is useful for removing unwanted values in date fields.

For example, if you display the Microsoft Project field "Actual Start", it may display the value NA. Use this field to convert the NA to some other text or to a blank field by leaving the "Show unknown dates as" field blank.

Calculate actual costs – Select this if you want Actual and Remaining Costs to be automatically calculated based on the % complete of the task.

Duration Units: – This option applies to the Duration and Duration type fields such as Duration1-Duration10, Baseline Duration, Duration Variance, etc. Select to display Minutes, Hours, Days, Weeks or Months as the default display Unit for all new Tasks and new/existing Summary Tasks in the project. Changing this option does not affect existing Tasks, only new Tasks added after the option has been set. It does affect existing Summary Tasks.

Work Units – This option applies to the Work and Work type fields such Actual Work, Baseline Work, etc. Select to display Minutes, Hours, Days, Weeks or Months as the default display Unit for all new Tasks and new/existing Summary Tasks in the project. Changing this option does not affect existing Tasks, only new Tasks added after the option has been set. It does affect existing Summary Tasks.

Display Language – Certain fields such as Duration Units, Work Units, Dependency Types, Constraint Types and the Flag fields can display in a supported, Non-English language based on Windows System settings or based on the version of Microsoft Project you are using. The Automatic option displays these fields using the language defined by Windows (Region and Language settings in the Control Panel) for all standalone projects. If you are linked to a Microsoft Project plan it automatically displays these fields in the same language of your version of Microsoft Project. If you set this to English the program will display these fields in English regardless of the Windows System settings or the version of Microsoft Project you are using.

Progress is - This option defines how Progress is defined for purposes of Cell Fill by Progress in WBS and Network Charts, Gantt Bar Progress Indicators and Progress Marks in WBS and Network Charts. Progress can be defined as being % Complete, % Work Complete or Physical % Complete.

Set as default – Select to make the options in the Scheduling section the default for all new projects.

## Currency

Symbol – Sets the default currency symbol for the current project.

Placement – Sets the placement of the currency symbol in relation to the currency amount.

Decimal Digits – Specifies the number of decimal digits for the currency.

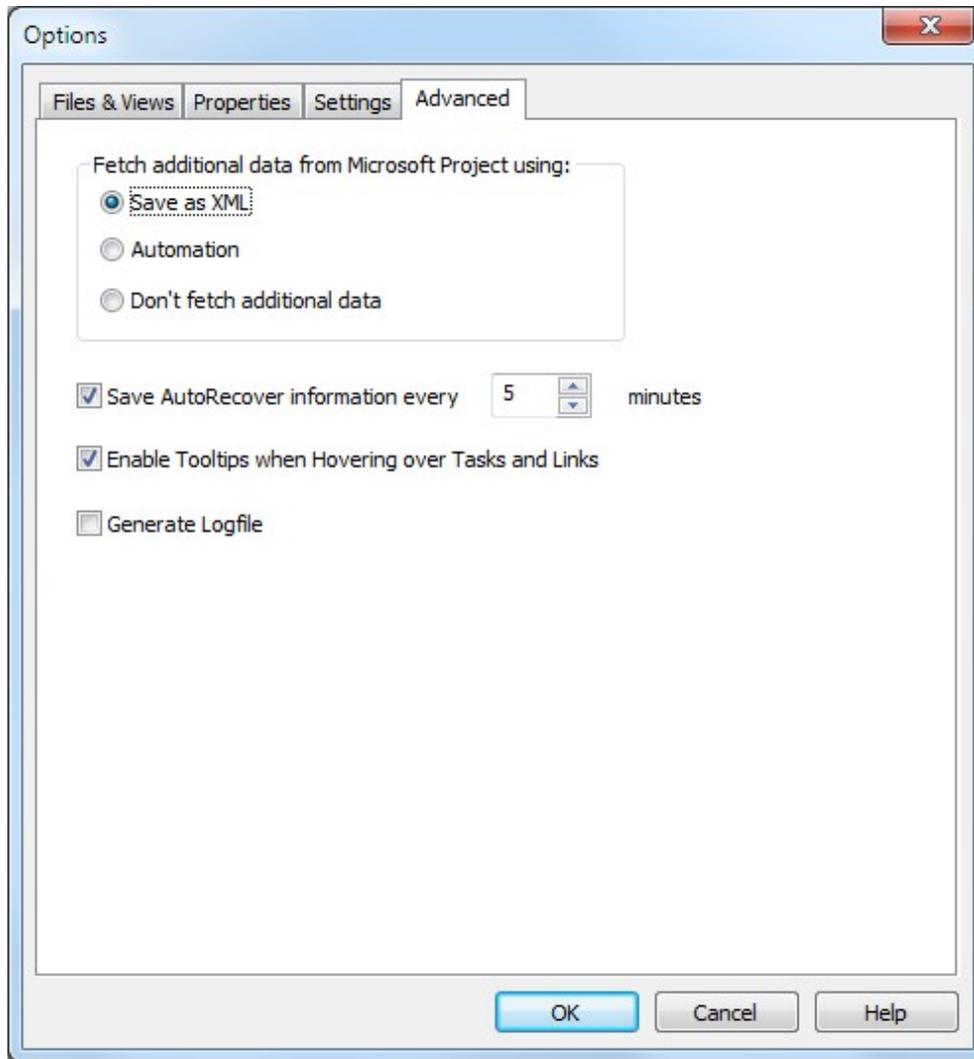
Project Start date – Set the start date of the current project.

Project Finish date – Set the finish date for the current project.

Schedule from Project Start date – Select this to schedule tasks forward from the Project Start Date. Deselect this to schedule tasks backwards from the Project Finish Date.

## Advanced

Modify program-wide settings.



Fetch additional data from Microsoft Project using:

This setting determines how Microsoft Project transfers Lookup Table (Value List) data for Text Fields and Outline Codes to WBS Schedule Pro when creating charts from Microsoft Project plans. The default is to instruct Microsoft Project to use an XML file for this. This is the fastest and most efficient way. However, there are times when Microsoft Project cannot, for reasons only known by Microsoft, save to XML files so this setting allows for an alternate way to transfer data or to avoid transferring Lookup Tables altogether.

Save as XML – Select this for faster data transfer when Microsoft Project allows it.

Automation – Select this if Microsoft Project is having trouble transferring data to WBS Schedule Pro and you need to see the Lookup Table values in WBS Schedule Pro. This is a slower approach but allows charts to be created when the XML approach fails.

Don't fetch additional data - Select this if you want to create a chart in WBS Schedule but don't need access to the Lookup Tables for Text Fields and Outline Codes. Creating charts from MS Project plans should be much faster using this approach. Tasks will still display the data entered into the Text Fields and Outline Codes but these fields will be Read-Only with this setting.

Save AutoRecover information every xx minutes - Select the AutoRecovery option to save copies of all currently open projects to temporary files at defined intervals. If WBS Schedule Pro unexpectedly closes, the last saved versions of these files will be restored when WBS Schedule Pro starts up.

Note that this is not an "AutoSave" feature so you must still save your files!

For reference, the temporary files are stored here:

C:\Users\USERNAME\AppData\Local when they are needed. These temporary files are removed upon each successful closing of the program.

Enable Tooltips when Hovering over Tasks and Links - Select to enable or disable the Tooltips that appear when you Hover over a Task in a WBS, Network or Gantt Chart or when you hover over a link line in a Network or Gantt Chart.

Generate Logfile - Select this option to create a text-based logfile that can be used by Critical Tools for diagnostic purposes. You will most likely be instructed by someone at Critical Tools to select this option and save this file. The file is called log.txt and is located in the C:\Users\USERNAME\Documents\WBS Schedule Pro folder.

## Home

### WBS Chart

Select the WBS Chart icon to switch to the last used WBS chart. Select the drop down arrow to choose from the list of WBS charts or to choose more options for creating new, copying, renaming or deleting WBS chart views.

For more information on working with Views, see [Views](#)

## Network Chart

Select the Network Chart icon to switch to the last used Network chart. Select the drop down arrow to choose from the list of Network charts or to choose more options for creating new, copying, renaming or deleting Network chart views.

For more information on working with Views, see [Views](#)

## Gantt Chart

Select the Gantt Chart icon to switch to the last used Gantt chart. Select the drop down arrow to choose from the list of Gantt charts or to choose more options for creating new, copying, renaming or deleting Gantt chart views.

For more information on working with Views, see [Views](#)

## Task Sheet

Select the Task Sheet icon to switch to the last used Task Sheet. Select the drop down arrow to choose from the list of Task Sheets or to choose more options for creating new, copying, renaming or deleting Task Sheet views.

For more information on working with Views, see [Views](#)

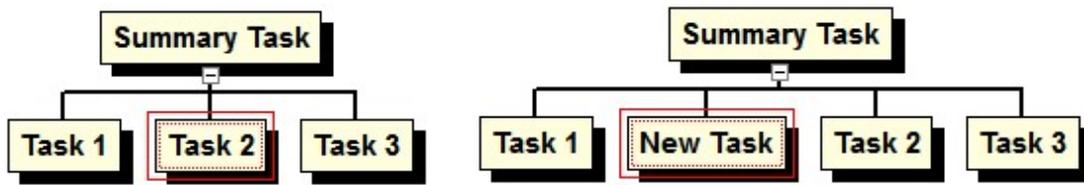
# Paste

## Paste Before

### WBS Charts

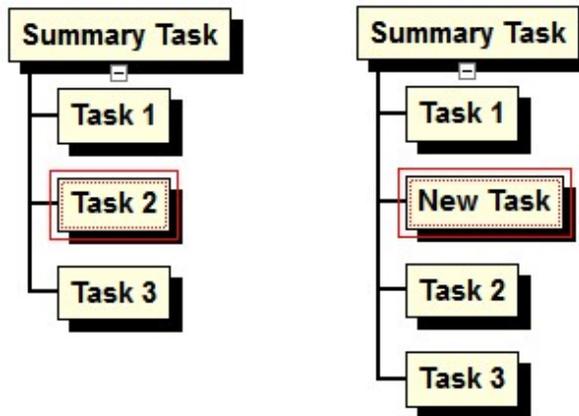
#### Paste Before

Paste Before pastes previously Cut or Copied tasks to the Left of the selected task if tasks are displayed in a left to right fashion or Above if they are listed vertically. For example:



With tasks listed left to right and Task 2 selected, choosing Paste Before...

...pastes the task to the left of Task 2.



With tasks listed vertically and Task 2 selected, choosing Paste Before...

...pastes the task above Task 2.

Tip: You can also Right-Click on a task to paste.

### Network Charts

Paste Before - Pastes the previously Cut or Copied tasks before the selected task based on ID. Paste Before is the only paste option available in Network Charts.

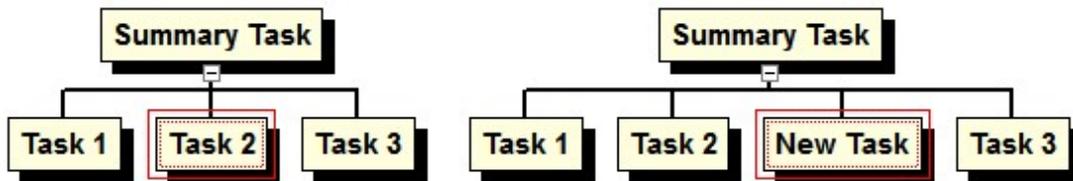
## Task Sheets

Paste Before - Pastes the previously Cut or Copied tasks above the selected task in the Task Sheet. Paste Before is the only paste option available in Task Sheets.

## Paste After

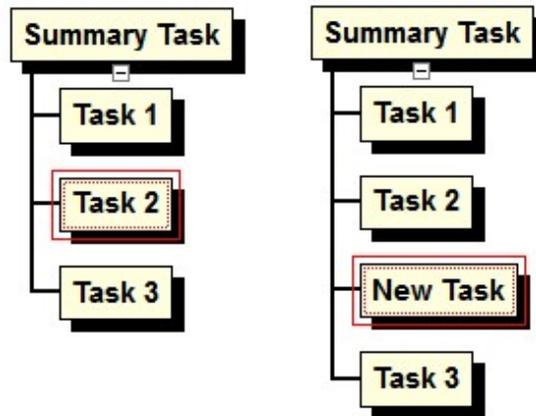
Paste After (only available in WBS Charts)

Paste After pastes previously Cut or Copied tasks to the Right of the selected task if tasks are displayed in a left to right fashion or Below if they are listed vertically. For example:



With tasks listed left to right and Task 2 selected, choosing Paste After...

...pastes the task to the right of Task 2.



With tasks listed vertically and Task 2 selected, choosing Paste After...

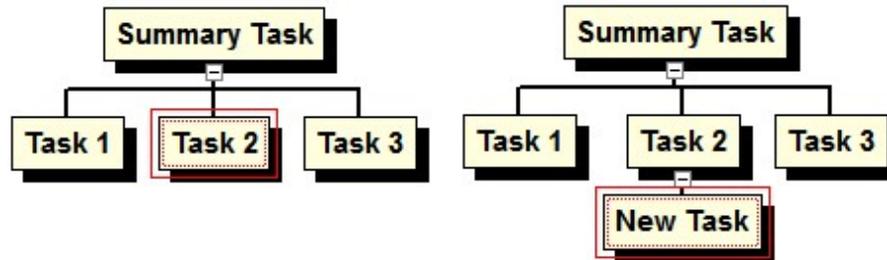
...pastes the task below Task 2.

Tip: You can also Right-Click on a task to paste.

## Paste Subtask

Paste Subtask (only available in WBS Charts)

Pastes previously Cut or Copied tasks as a subordinate to the selected task. This turns the selected task into a Summary if it is not one already. For example,



With Task 2 selected, the  
Paste Subtask command...

...pastes the task below  
Task 2.

Tip: You can also Right-Click on a task to paste.

## Cut

Cuts (deletes) the selected task and places it on the Clipboard so you can paste it elsewhere. If you select a Summary Task and choose Cut, it will cut that Summary Task and all tasks below. You can also copy and cut tasks by using the right mouse button.

Select another task in the chart and choose Edit-Paste Before, Edit-Paste After or Edit-Paste Subtask to place the cut task relative to the selected task. You can also Right-Click a task to Paste.

## Copy

Copies the selected task and places it on the Clipboard so you can paste it elsewhere. If you select a Summary Task and choose Copy, it will copy that Summary Task and all tasks below. You can also copy and cut tasks by using the right mouse button.

Select another task in the chart and choose Edit-Paste Before, Edit-Paste After or Edit-Paste Subtask to place the copied task relative to the selected task. You can also Right-Click a task to Paste.

The Copy feature does not copy the chart image, only task information. To copy the chart image, see Copy Picture

## Copy Picture

Copies the current chart to the Clipboard as an image. You can then Paste the image into another Windows application.

This process is the preferred method of pasting a WBS or Network chart into another Windows application.

If you need to send the image as a file we recommend using the File-Save As Picture command and saving as a .EMF file.

## Insert

### Task Before

Inserts a new Task "before" the selected one in the chart. Depending on the current View and arrangement of tasks within a View, the term "before" could mean above or to the left of the selected task.

## Task After

Inserts a new Task "after" the selected one in the chart. Depending on the current View and arrangement of tasks within a View, the term "after" could mean below or to the right of the selected task.

## Summary Task

Inserts a Summary Task above the selected Task.

## Subtask

Inserts a Subtask to the selected Task. This could make the selected task a Summary Task to the newly inserted Task.

## Delete

Deletes the selected Summary Task or Task. If you delete a Task you are NOT prompted to confirm this deletion. Select Undo if you want to undo the delete, and you are using WBS Standalone. You cannot undo the delete if you are working with a chart that is linked to a Microsoft Project Plan.

If you delete a Summary Task you are prompted to confirm and are given three options. The options are listed below with an explanation of each:

Delete Summary Task xx and its subtasks – Select this option and press OK to delete the selected Summary Task and all of its subordinates (the Summary Task and everything below it).

Delete Summary Task xx but keep its subtasks – Select this option and press OK to delete the selected Summary Task but not the items below the selected Summary Task.

Cancel – This cancels the Delete operation.

## Task Info

### General

#### General

The Task Information dialog box can be found by selecting Task Info from the Home tab, by double-clicking a task.

The Task Information dialog box is used for both Summary Tasks and Tasks. If you display the Task Information for a Summary Task there may be some fields in the dialog box that cannot be edited due to the fact that they are rolled up (calculated) fields.

The screenshot shows the 'Task Information (ID: 1)' dialog box with the following fields and values:

- Name:** Task 1
- Duration:** 5d
- % Complete:** 0%
- WBS:** 1
- Work:** 80h
- Cost:** \$0.00
- Start:** 01/01/2014 8:00 AM
- Finish:** 01/07/2014 5:00 PM
- Constraint Type:** Start No Earlier Than
- Constraint Date:** 01/01/2014 8:00 AM
- Resource Names:** Audrey,Blake

Buttons at the bottom: OK, Cancel, Help.

Name – Enter a name or description of the task.

Duration – Enter the duration for the task. The duration can be entered in Minutes, Hours, Days, Weeks or Months. Duration can be entered using the following format:

- M = Minutes
- H = Hours
- D = Days
- W = Weeks
- MO = Months

For example, for a 10 day task you can enter 10d in the duration field, a 2 week task would be 2w.

For more information on Duration, see [Scheduling](#)

% Complete – Enter the Percent Complete for the task. This field is also calculated for a task when the appropriate scheduling information is provided such as Actual Start or Actual Finish.

WBS – Enter the WBS for the task. The WBS code is initially derived from that task's position in the structure of the WBS chart with the top being 1 and the second level 1.1, 1.2, etc... You can let WBS Schedule Pro calculate this for you or you can enter this information yourself. If you enter data into the WBS field yourself, WBS Schedule Pro will no longer update this number for you even if you move the task. To make WBS Schedule Pro calculate the WBS field after you have entered information into this field, remove the data that you entered. WBS Schedule Pro will then calculate this data again.

Work – Enter the Work (Hours) for the task.

Cost – Enter the Cost for the task.

Start – The date and time a task is scheduled to begin. You can enter the start date, or it will be calculated based on the Project Start/Finish date, dependencies, Constraint Type and Constraint Date.

Finish – The date and time a task is scheduled to Finish. You can enter the finish date, or it will be calculated based on the Project Start/Finish date, dependencies, Constraint Type and Constraint Date.

Constraint Type – Select a constraint from the list. For more information on how Constraints work, see [Scheduling](#)

Constraint Date – Enter a date for the constraint. For more information on how Constraints work, see [Scheduling](#)

Resource Names – Lists resources that are assigned to this task. You cannot assign resources into this field directly; you must use the Resources button.

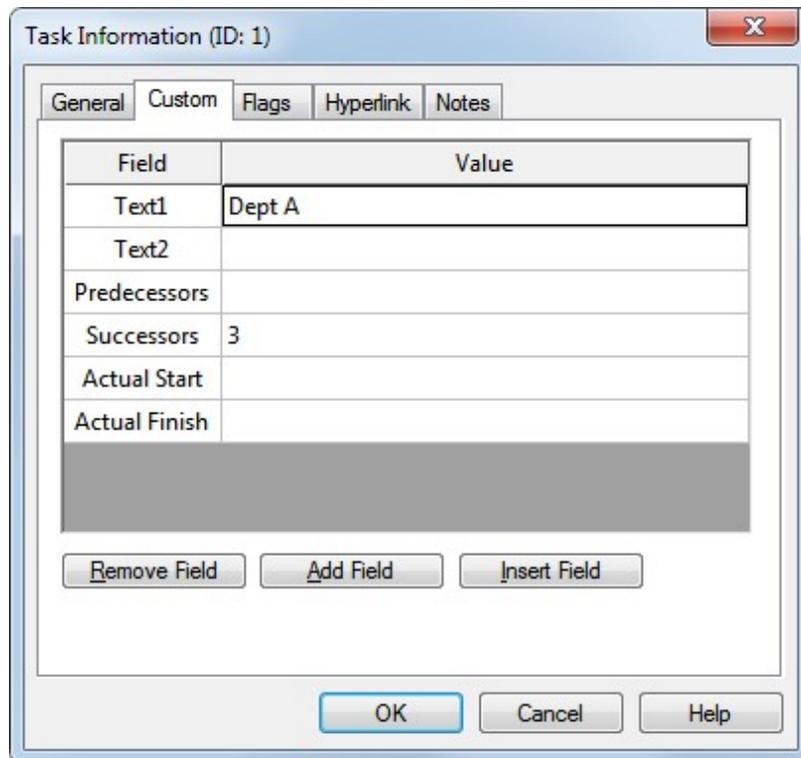
Resources>> - Displays the Assign Resource form. In the Assign Resource form, select a resource (or resources) to assign to this task and press OK. The assigned resources will then appear in the Resource Names field. If the Resources button is not available it means that you do not have resources defined in this project. You must define the list of resources before you can assign them. To define the Resources for this project select the Tools-Resources menu.

## Custom

### Custom

The Custom Tab allows you to list additional fields for entering data. For example, if you want to enter data into the Actual Start and Actual Finish fields then you could list these fields in the Custom Tab, since they are not fields that appear in the General Tab.

Choose the Add Field button to add a field to the end of the list. Choose Insert Field to insert a field above the selected field. Choose Remove Field to remove the selected field.



The screenshot shows the 'Task Information (ID: 1)' dialog box with the 'Custom' tab selected. The dialog has a title bar with a close button (X) and a tabbed interface with 'General', 'Custom', 'Flags', 'Hyperlink', and 'Notes' tabs. The 'Custom' tab contains a table with two columns: 'Field' and 'Value'. The table has the following rows:

Field	Value
Text1	Dept A
Text2	
Predecessors	
Successors	3
Actual Start	
Actual Finish	

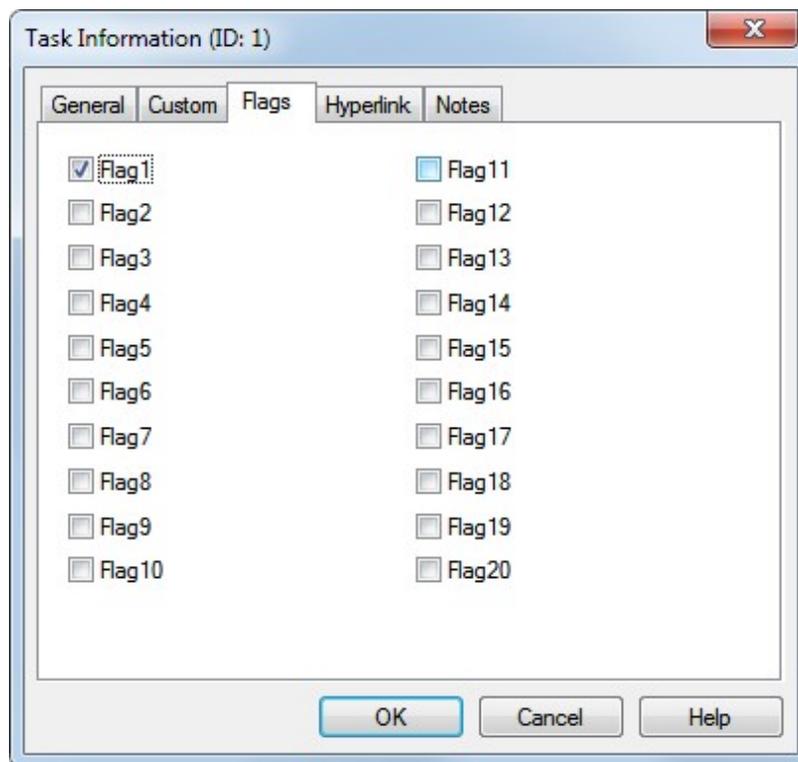
Below the table are three buttons: 'Remove Field', 'Add Field', and 'Insert Field'. At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

## Flags

### Flags

The Flag Tab allows you to quickly set a Flag field for a task. The Flag fields are simple Yes/No fields that are displayed as checked or non-checked fields (checked means Yes and non-checked means No). If multiple Flags are set on a task, the lowest numbered Flag takes precedence and the others are ignored. The Flag fields in WBS Schedule Pro correspond to the Microsoft Project Flag fields, but you can use them independent of Microsoft Project.

The Flag fields can be used to define task box colors in the WBS chart. To use the Flag fields to define colors, select the Format-Borders menu and select the "Borders Based on Flags" option. Then, define different colors/styles/shadows for each Flag field. Once this is done, select tasks in the WBS chart and use the Flag Tab in the Task Information dialog box to define that a specific task use a specific Flag, as shown below:



For more information on the different ways to color your WBS chart dependent on Critical Path, the Flag fields or Progress, see [Borders](#)

## Hyperlinks

### Hyperlink

The Hyperlink Tab allows you to enter a Hyperlink to go to the specified document or web page from within WBS Schedule Pro. When you enter a Hyperlink file or web page address you can go to this link from within WBS Schedule Pro by clicking the Hyperlink button associated with the task. This button is a small square that appears above and to the left of the task. Clicking this button jumps to the specified link.

There are four Hyperlink fields in the Task Information form. These four fields work together to point to one hyperlink location for a task (you cannot enter more than one hyperlink per task). They are:

**Hyperlink** – This is the “displayed” name for the Hyperlink. By default when you enter a Hyperlink Address the Hyperlink field copies this information but if you type text into the Hyperlink field after the link is created it will display this text.

**Hyperlink Href** – This is the full address of the document or web page. It is the concatenation of the Hyperlink Address and Hyperlink Subaddress fields. You can enter the complete address in this field or enter the Hyperlink Address along with the Hyperlink Subaddress and the Hyperlink Href will be the sum of the two.

**Hyperlink Address** – This is the main document or web page that a task is linked to.

**Hyperlink Subaddress** – The Hyperlink Subaddress goes to a certain place within the link referred to in the Hyperlink Address field. The most common use for this is to jump to a Bookmark (section within a document or web page).

Task Information (ID: 1)

General Custom Flags **Hyperlink** Notes

Hyperlink: (displayed text)

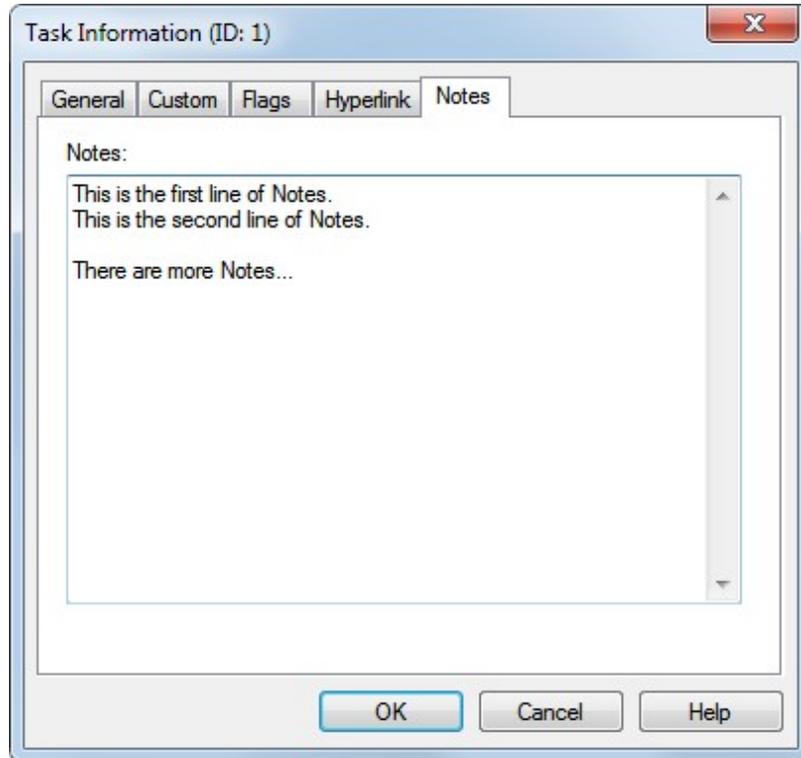
Hyperlink Href: (full path)

Hyperlink Address: (document path)

Hyperlink SubAddress: (bookmark/section in document)

## Notes

Use the Notes tab to enter extensive details about a Task or Summary Task in the project.



For more information on using the Notes field, see [Adding Notes to a Task](#)

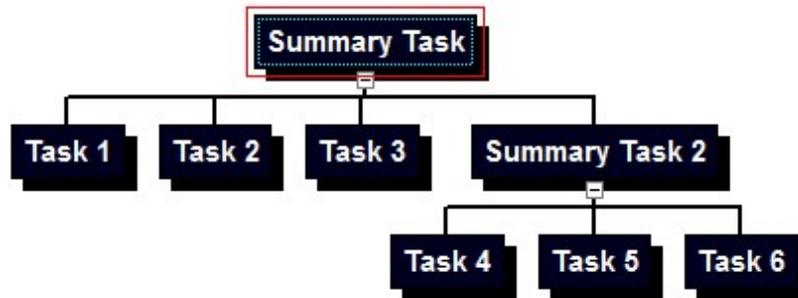
## Select

### All

Selects all Summary Tasks and Tasks in the current chart. Once all items have been selected you can perform certain operations on these items depending on the View.

You can also press Ctrl-A to Select All.

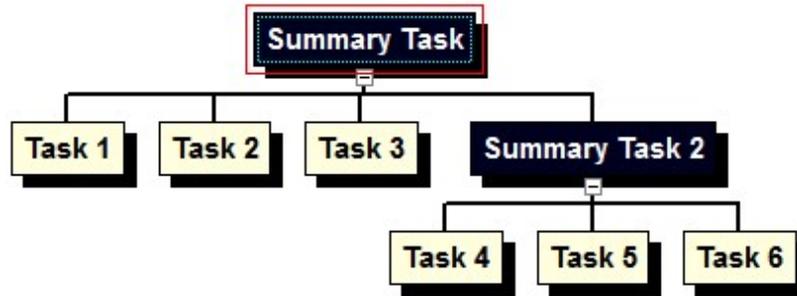
Here is an example of Select All in a WBS Chart:



## Summary Tasks

Selects all Summary Tasks in the current chart. Once all Summary Tasks have been selected you can perform certain operations on these depending on the View.

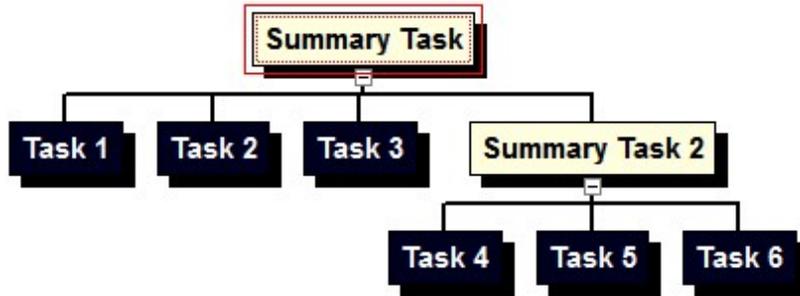
Here is an example of Select Summary Tasks in the WBS Chart:



## Tasks

Selects all Tasks in the current chart. Once all Tasks have been selected you can perform certain operations on these depending on the View.

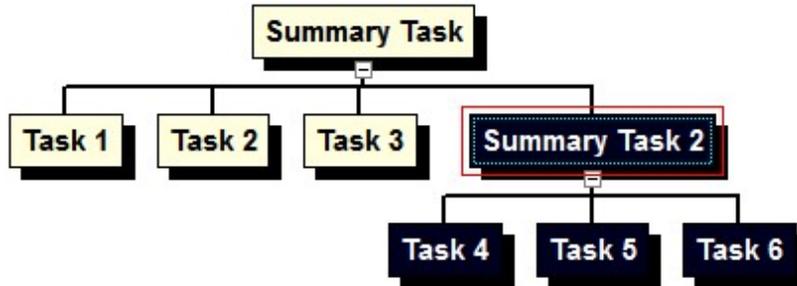
Here is an example of Select Tasks in the WBS Chart:



## Branch

Selects the current Summary Task and all subtasks. Once the branch has been selected you can perform certain operations on this depending on the View.

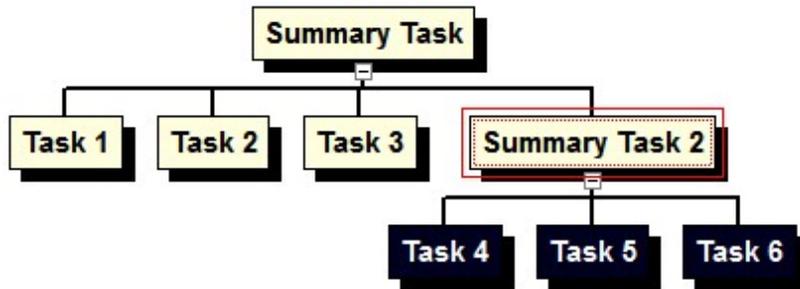
Here is an example of Select Branch in the WBS Chart:



## Subtasks

Selects all Subtasks to the selected Summary Task. Once all Subtasks have been selected you can perform certain operations on these depending on the View.

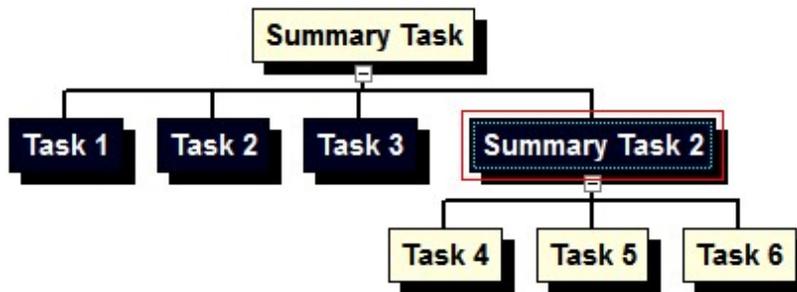
Here is an example of Select Subtasks in the WBS Chart:



## Level

Selects all Summary Tasks and Tasks at the current level of the selected box. Once all Summary Tasks and Tasks at the current level have been selected you can perform certain operations on these depending on the View.

Here is an example of Select Level in the WBS Chart:



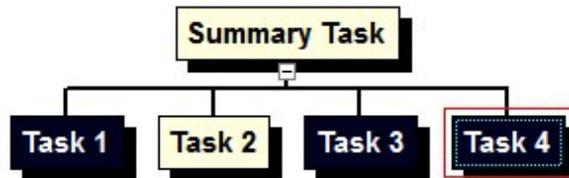
## Link

Creates a Finish to Start dependency between the selected tasks in the chart. You can Link tasks in any View (WBS Chart, Network Chart or Task Sheet). However, only the Network Chart shows the dependency lines between tasks. The WBS Chart and Task Sheets can only show the Predecessor and/or Successor fields to display the dependency information about a task.

Select two tasks or any number of tasks before selecting the Link button. Links (dependencies) are made between tasks in ID order regardless of the order the tasks were selected.

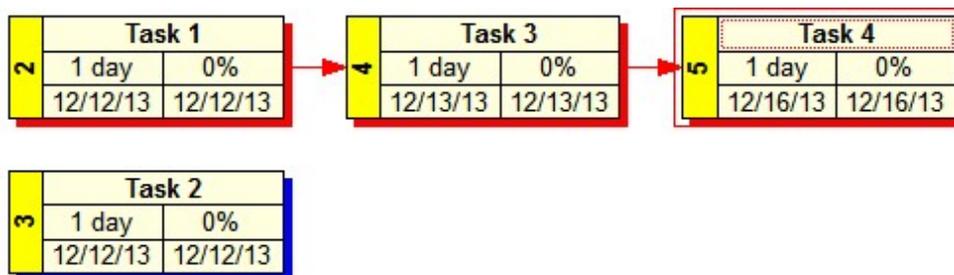
### WBS Charts

Link tasks in a WBS Chart by selecting tasks and clicking the Link button.



### Network Charts

Link tasks in a Network Chart by selecting tasks and clicking the Link button but you can also click and drag between tasks in a Network Chart to create dependencies.



### Task Sheets

Link tasks in a Task Sheet by selecting rows and clicking the Link button.

	Name	Duration	Predecessors
1	<input type="checkbox"/> <b>Summary Task</b>	3d	
2	Task 1	1d	
3	Task 2	1d	
4	Task 3	1d	2
5	Task 4	1d	4

For more information on Linking and creating Dependencies, see [Linking](#)

## Unlink

Removes the dependency between two or more selected tasks in any View (WBS Chart, Network Chart or Task Sheet).

To modify a Link in a Network Chart, doubleclick the dependency line that exists between any two tasks. This display Task Dependency form where you can modify the dependency.

To modify a Link in a WBS Chart or Task Sheet, display the Predecessor and/or successor field in a WBS Chart or Task Sheet and change the value or the Predecessor or Successor.

## One to Many

Creates a Dependency from the active Task (with the red box around it) to the selected Tasks (the highlighted ones). This allows you to create multiple dependencies from a single task at the same time. For example, the following has 4 tasks selected with Task 1 the active task:

Task 1		
1	1 day	0%
	1/1/14	1/1/14

Task 2		
2	1 day	0%
	1/1/14	1/1/14

Task 3		
3	1 day	0%
	1/1/14	1/1/14

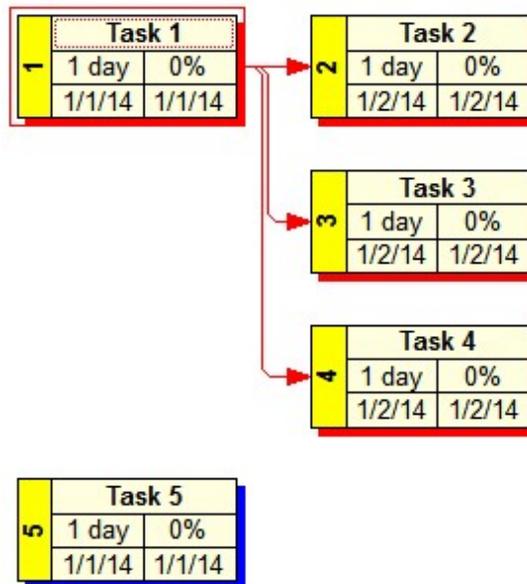
  

Task 4		
4	1 day	0%
	1/1/14	1/1/14

Task 5		
5	1 day	0%
	1/1/14	1/1/14

Selecting One to Many would link Task 1 to Task 2, Task 3 and Task 4 with one click...



### Selecting Multiple Tasks and setting the Active Task

To select multiple tasks in a WBS Chart or Network Chart:

1. Click in white space and drag around a group of tasks to fully enclose all those that you want to select.
2. Ctrl-click with your mouse to select any number of tasks. Keep the Ctrl key down while you select various tasks in the chart.

To select multiple tasks in a Task Sheet:

1. Click and drag across multiple rows to highlight the ones you want to select.
2. Ctrl-click with your mouse to select any number of tasks. Keep the Ctrl key down while you select various tasks in the chart.

Once the tasks have been highlighted, to set the Active task, hold the Ctrl key down and select the one you want to be the Active task. It may or may not stay highlighted but once the red box is around it then it becomes the Active task.

## Many to One

Creates a Dependency from the selected Tasks (the highlighted ones) to the active Task (with the red box around it) . This allows you to create multiple dependencies to a single task at the same time. For example, the following has 4 tasks selected with Task 4 the active task:

1	Task 1	
	1 day	0%
	1/1/14	1/1/14

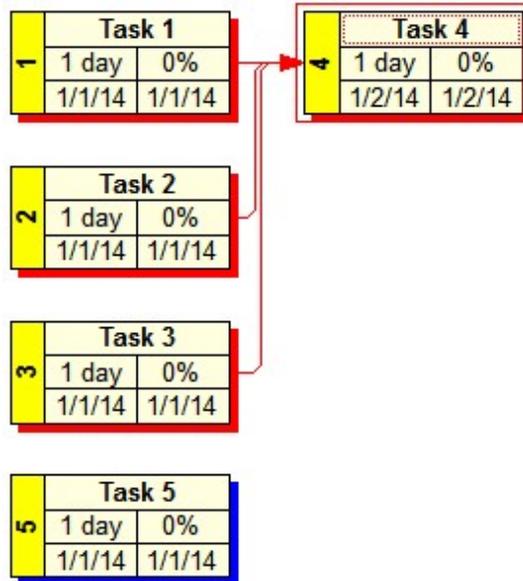
2	Task 2	
	1 day	0%
	1/1/14	1/1/14

3	Task 3	
	1 day	0%
	1/1/14	1/1/14

4	Task 4	
	1 day	0%
	1/1/14	1/1/14

5	Task 5	
	1 day	0%
	1/1/14	1/1/14

Selecting Many to One would link Task 1, Task 2 and Task 3 to Task 4 with one click...



### Selecting Multiple Tasks and setting the Active Task

To select multiple tasks in a WBS Chart or Network Chart:

1. Click in white space and drag around a group of tasks to fully enclose all those that you want to select.
2. Ctrl-click with your mouse to select any number of tasks. Keep the Ctrl key down while you select various tasks in the chart.

To select multiple tasks in a Task Sheet:

1. Click and drag across multiple rows to highlight the ones you want to select.
2. Ctrl-click with your mouse to select any number of tasks. Keep the Ctrl key down while you select various tasks in the chart.

Once the tasks have been highlighted, to set the Active task, hold the Ctrl key down and select the one you want to be the Active task. It may or may not stay highlighted but once the red box is around it then it becomes the Active task.

## Indent

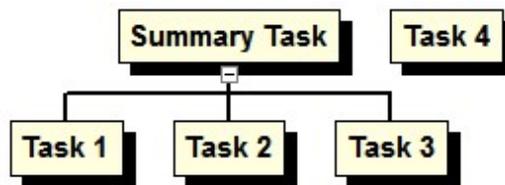
In the Task Sheet, makes the current Task (or Tasks) a Subtask (or Subtasks) to the one above it.

The Indent button is only available in the Task Sheet. You can achieve the same results in a WBS Chart by adding Tasks below another. For example, in a Task Sheet you can indent several tasks under another to make the top-most task a Summary Task. Clicking Indent with Task 1, Task 2 and Task 3 selected produces the Task Sheet on the right:

	Name	Duration	Start	Finish
1	Summary Task	1d	1/1/2014	1/1/2014
2	Task 1	1d	1/1/2014	1/1/2014
3	Task 2	1d	1/1/2014	1/1/2014
4	Task 3	1d	1/1/2014	1/1/2014
5	Task 4	1d	1/1/2014	1/1/2014

	Name	Duration	Start	Finish
1	<input type="checkbox"/> Summary Task	1d	1/1/2014	1/1/2014
2	Task 1	1d	1/1/2014	1/1/2014
3	Task 2	1d	1/1/2014	1/1/2014
4	Task 3	1d	1/1/2014	1/1/2014
5	Task 4	1d	1/1/2014	1/1/2014

The corresponding WBS Chart would look like this:



## Outdent

In the Task Sheet, moves the current Task or Summary Task up one outline level.

The Outdent button is only available in the Task Sheet. You can achieve the same results in a WBS Chart by rearranging tasks and moving them up a level. For example, highlighting Task 1, Task 2 and Task 3 in the Task Sheet on the left and clicking Outdent produces the Task Sheet on the right:

	Name	Duration	Start	Finish
1	<input type="checkbox"/> <b>Summary Task</b>	1d	1/1/2014	1/1/2014
2	Task 1	1d	1/1/2014	1/1/2014
3	Task 2	1d	1/1/2014	1/1/2014
4	Task 3	1d	1/1/2014	1/1/2014
5	Task 4	1d	1/1/2014	1/1/2014

	Name	Duration	Start	Finish
1	Summary Task	1d	1/1/2014	1/1/2014
2	Task 1	1d	1/1/2014	1/1/2014
3	Task 2	1d	1/1/2014	1/1/2014
4	Task 3	1d	1/1/2014	1/1/2014
5	Task 4	1d	1/1/2014	1/1/2014

The corresponding WBS Chart would look like this:



In this case you have removed any structure to the project.

## Expand

Reveals the hidden subtasks of the selected Summary Task in the chart.

If Outline Symbols are displayed in the chart, you can also press the plus sign (+) for that Summary Task to reveal the subtasks.

To reveal all subtasks in the chart, choose the Expand All button.

## Collapse

Hides the subtasks of the selected Summary Task in the chart.

If Outline Symbols are displayed in the chart, you can also press the minus sign (-) for that Summary Task to hide the subtasks.

To hide all subtasks in the chart, choose the Summary Only button.

## Expand All

Reveals the hidden subtasks for all Summary Tasks in the chart.

## Summary Only

Hides all Tasks in the chart and displays only the Summary Tasks.

## Focus

Displays only the selected Summary Task and those items below it while hiding the rest of the chart. This is useful for isolating a section of your WBS chart for display or printing.

Select the Focus button again to restore focus to the entire chart.

## Edit Groups

The Grouping dialog allows you to change how the structure of the project is displayed.

**Grouping**

Use Default Grouping (Summary Tasks and Tasks)

Use a Single Field to Group (should contain hierarchical data, eg: 1, 1.1, 1.2, etc.):

Field:  Blank Label:

Use a Single Non-hierarchical Field or Series of Fields:

	Field	Order	Blank Label
Group By	Resource Names	Ascending	No Resource Names
Then By			
Then By			
Then By			

Sort by:   Descending

Then by:   Descending

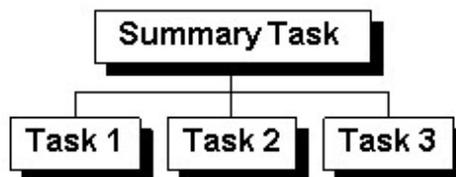
Then by:   Descending

Show Empty Groups

Help OK Cancel

There are three ways to Group the data in a project. They are:

1. The Default Outline Structure - This is the standard way to display a hierarchy in WBS Schedule Pro. Creating a WBS Chart or Indenting Tasks in the Gantt Chart or Task Sheet creates Tasks and Summary Tasks. For example,



or

	WBS	Name	Duration	May 3						
				F	S	S	M	T	W	T
1	1	☐ Summary Task	3d							
2	1.1	Task 1	1d							
3	1.2	Task 2	1d							
4	1.3	Task 3	1d							

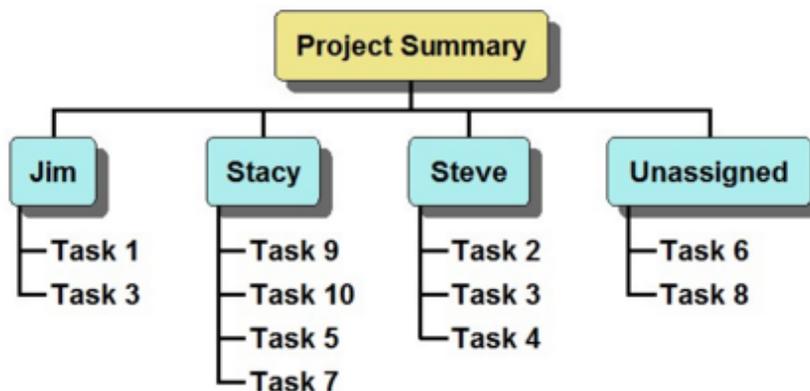
The Default Outline Structure uses the Outline Number field to create the hierarchy. The Outline Number field in WBS Schedule Pro can only be created by Inserting or Moving Tasks and Summary Tasks.

This is the same technique that Microsoft Project uses. Microsoft Project creates the Outline by indenting tasks in a Gantt Chart. In WBS Schedule Pro, creating a WBS Chart or Indenting/Outdenting tasks in the Gantt Chart or Task Sheet creates the same Outline that you would see in Microsoft Project.

2. Using a Single Field - This refers to using a single field to define the structure of the project. This single field must contain hierarchical information such as A, A.1, A.1.1, A.1.2, etc. When you select this field on which to group, WBS Schedule Pro will attempt to parse this field to determine a hierarchy. This is useful if you have defined your own hierarchy using the WBS, Text or Outline Code fields.

3. Using a Series of Fields - This refers to using a non-hierarchical field to display the structure of the project. This can be a single field with many of the same values or several fields with various values to define the structure.

An example of this is the Resource Names field. Grouping on Resource Names would create a hierarchy of Resources and Tasks assigned to these Resources. Like this:



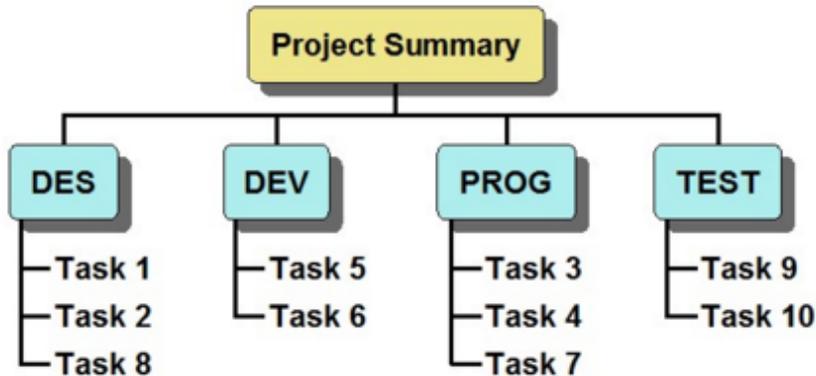
The Text fields are another useful way to utilize this grouping feature. As a example, if you used a Text field to store the Department names you may have information like this:

Name	Text1
<b>Project Summary</b>	
<b>Planning</b>	
Task 1	DES
Task 2	DES
Task 3	PROG
Task 4	PROG
<b>Coding</b>	
Task 5	DEV
Task 6	DEV
Task 7	PROG
<b>Testing</b>	
Task 8	DES
Task 9	TEST
Task 10	TEST

The current outline of the above uses the Default Outline Level to display the structure. Selecting to Group on the Text 1 field would produce this result in a Task Sheet:

	Name	Text1
	<input type="checkbox"/> <b>DES</b>	<b>DES</b>
3	Task 1	DES
4	Task 2	DES
12	Task 8	DES
	<input type="checkbox"/> <b>DEV</b>	<b>DEV</b>
8	Task 5	DEV
9	Task 6	DEV
	<input type="checkbox"/> <b>PROG</b>	<b>PROG</b>
5	Task 3	PROG
6	Task 4	PROG
10	Task 7	PROG
	<input type="checkbox"/> <b>TEST</b>	<b>TEST</b>
13	Task 9	TEST
14	Task 10	TEST

Or this in a WBS Chart:



The above uses a single Text field but you can also use several or a combination of fields that contain the breakdown of information you wish to display.

The Sort by options allow you to change the order in which the detail items appear. The Sort options only apply when you are grouped by a Single non-hierarchical field or Series of Fields.

The Show Empty Groups option displays a group header when there are no items assigned to that group. For example, if you have Resources defined and are Grouped by Resource Names, selecting this checkbox would display all Resources in the chart including Resources that don't have Task assignments. De-selecting this option would only display Resources that have been assigned to Tasks.

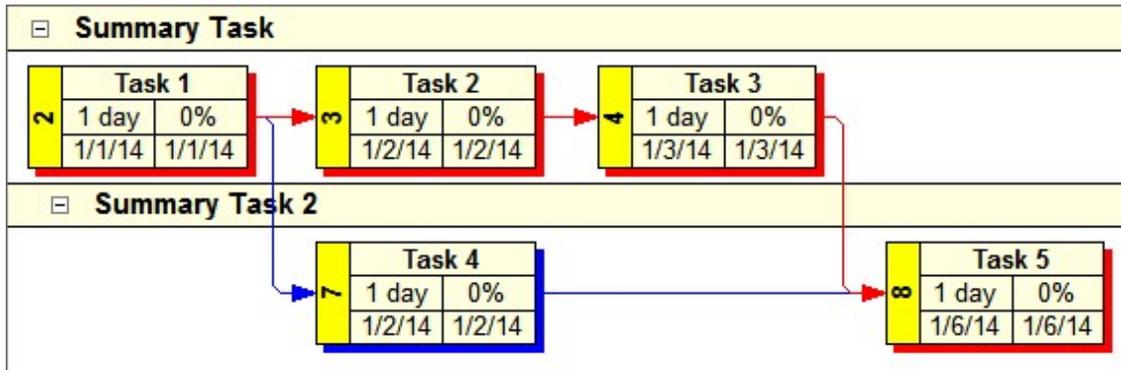
The Grouping defined in the Groups dialog applies across WBS Charts, Network Charts, Gantt Charts and Task Sheets unless you select the Independent checkbox in the Home tab. Selecting the Independent checkbox applies the Grouping changes only to the current view.

## Grouped

The Grouped option only applies to Network Charts and allows you to select whether or not the current Network Chart is Grouped.

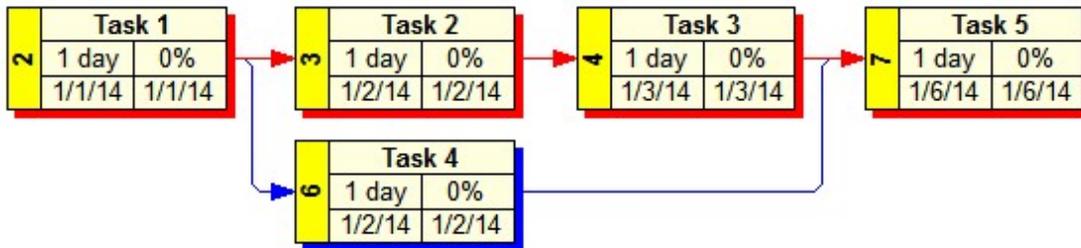
If selected, the current Network Chart uses the Grouping options defined in Edit Groups. By default, Network Charts are Grouped and allow you to see the Horizontal bands across the page that represent the various Groups in the project.

Here is an example of a Network Chart Grouped by Outline:



If not selected, the current Network Chart removes the Group Headers and displays all Tasks in one chart.

Here is an example of that same Network Chart when not Grouped:



## Project Summary Task

Turns the Project Summary Task on and off.

The Project Summary Task represents the highest level of the project. It is used to quickly display the highest level of a project (or chart) without adding a “real” task. The Project Summary Task has a WBS code of 0 (zero) and represents the rollup of the entire project. The name of the Project Summary Task is the name of the project.

You cannot delete the Project Summary Task, and other Summary Tasks and Tasks can only be created below the Project Summary task.

If you have already created a project with top level Summary Task at the top then there may not be a need for a Project Summary Task. However, when you place a real task at the top of a project, the WBS code is started at the number 1. Many people like to start with the number 0 at the top and you can use the Project Summary Task for this.

The Project Summary Task is also useful if you create a WBS chart from an external datasource (such as Microsoft Project) where there may not be a single project-wide Summary Task. You can quickly show a top-level box with all of the project information rolled up by selecting the Project Summary Task option.

The Project Summary Task works much like the Project Summary Task option in Microsoft Project.

## Independent

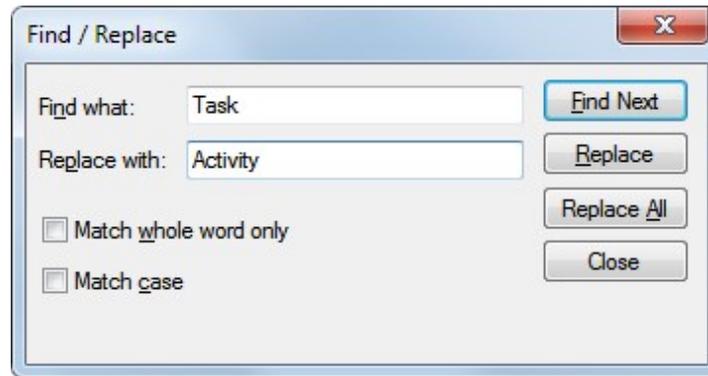
Select to make the current View's Grouping independent of all other Views.

By default, Grouping options are applied across the WBS Chart, Network Chart and Task Sheet Views. If you change the way one View is Grouped this applies to all the others where the Independent checkbox is not selected.

By selecting the Independent checkbox, changes made to the way the current View is Grouped does not affect other Views.

## Find

Searches the current chart and selects the first occurrence of the text entered in the Find what: field. The Find feature only looks for text that is currently displayed in the chart.



Select the Find Next button to find the next occurrence of the text.

You can also cancel the dialog and press F3 to find the next occurrence of the text.

Enter new text in the Replace with: field and replace the text as you find it or press Replace All to replace all occurrences of the text at once.

## Go To

Searches for and selects a task in the current chart based on certain criteria. Type in the ID or WBS number for the task you are looking for and WBS Schedule Pro will select this task.

## Spelling

Starts Spell Checking the current Project. Use the drop down arrow to set Spell Check options and specify which fields to Spell Check.

## MS Project

Switches to Microsoft Project. If the current WBS Schedule Pro chart is a “standalone” chart (has never been transferred to Microsoft Project) then this button transfers the data in the current chart to Microsoft Project for further scheduling. The data is then stored in Microsoft Project and the chart is “linked” to this Microsoft Project plan.

If the current chart is linked to an open Microsoft Project plan then this button switches to that plan in Microsoft Project.

## View

### Zoom In

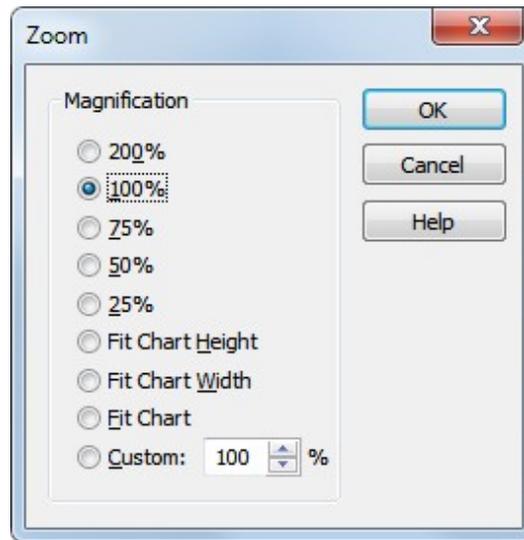
Increases the size of the chart on the screen. You can also Zoom In using the Zoom Slider in the lower right corner of the screen.

## Zoom Out

Decreases the size of the chart on the screen. You can also Zoom Out using the Zoom Slider in the lower right corner of the screen.

## Zoom Custom

Displays the Zoom dialog box for adjusting the WBS or Network chart to specific or custom factors. You can also display the Zoom dialog by selecting the Zoom factor displayed in the lower right corner of the screen. Zoom displays the Zoom dialog box for adjusting the WBS chart to specific zoom factors.



Select from one of the preset zoom factors (200% - 25%) to enlarge or shrink the WBS chart on the screen to the size selected.

Select Fit Chart Height to shrink the chart to fit vertically on the screen.

Select Fit Chart Width to shrink the chart to fit horizontally on the screen.

Select Fit Chart to shrink the entire chart to one screen.

Select Custom to enter a specific zoom factor.

## Normal

Displays the chart in a regular window without page breaks or other output indicators.

## Print Layout

Displays the chart in a window with page breaks as they would appear if printed. Page breaks are displayed based on the currently selected printer and paper size.

The Print Layout mode is useful for moving tasks around to avoid page breaks but you can also have WBS Schedule Pro automatically adjust for page breaks by selecting this option in File-Page Setup.

## Online Layout

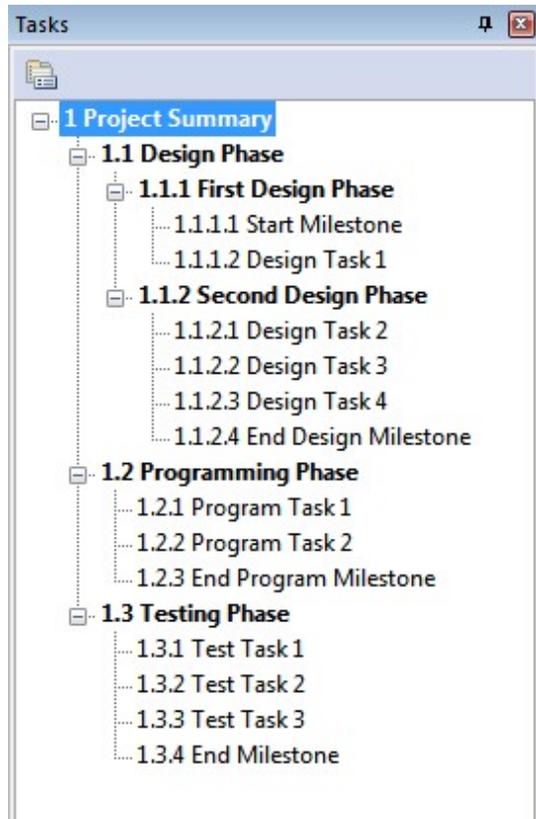
Displays the chart in a window with page breaks as they would appear if saved as HTML (File-Save As-Save As Web Pages). Page breaks are displayed based on the size of the image specified in the template used to create the Web Pages.

See also [Save as Web Pages](#)

## Tasks Pane

### Tasks

Displays all of the Summary Tasks and Tasks in the project. Selecting a Task in this list will also select it in the chart. By default the WBS code is listed next to the Task name. Click the button in the upper left corner of the Tasks Pane to show the Full Codes, Short Code (the last or right-most value of the code) or No Codes preceding the Task Names.



### Some tips for working with Panes

When Panes share space, select the tab of the Pane you wish to view.

Click the tab of the desired Pane and drag it to the middle of the chart to make it "float".

Click a floating Pane's title bar and drag it back over the other tabs to make it part of the same group of Panes.

Click the Auto Hide (Push Pin) icon to dock the pane against the side or bottom of the chart. Hover over the hidden tabs to quickly display the Pane. Click the Push Pin to anchor it again so it is always visible.

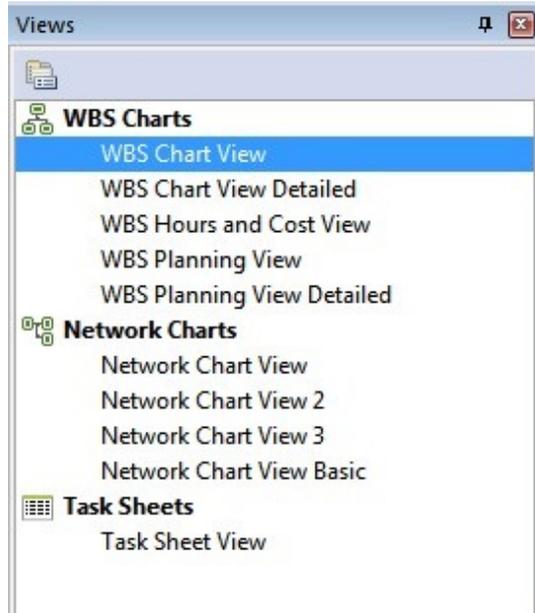
Click the title bar of a Pane and drag it over the displayed screen location to "dock" it at that location.

If you hide a Pane using the X, go to the View tab on the Ribbon and select the Pane you wish to view.

## Views Pane

### Views

Displays all of the WBS Chart, Network Chart and Task Sheet Views in the project. Select a View from this list to display the project using this View.



### Some tips for working with Panes

When Panes share space, select the tab of the Pane you wish to view.

Click the tab of the desired Pane and drag it to the middle of the chart to make it "float".

Click a floating Pane's title bar and drag it back over the other tabs to make it part of the same group of Panes.

Click the Auto Hide (Push Pin) icon to dock the pane against the side or bottom of the chart. Hover over the hidden tabs to quickly display the Pane. Click the Push Pin to anchor it again so it is always visible.

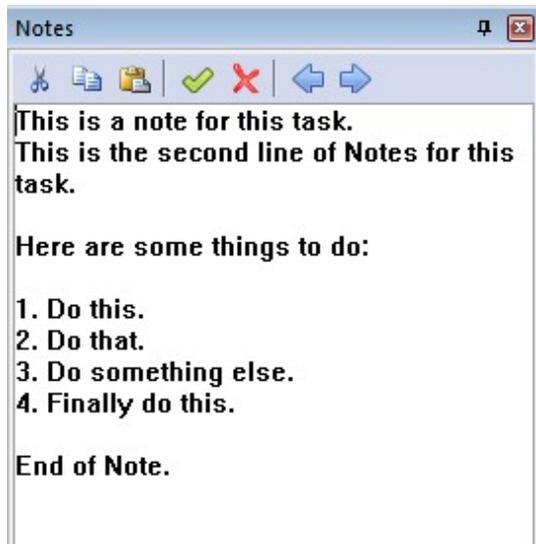
Click the title bar of a Pane and drag it over the displayed screen location to "dock" it at that location.

If you hide a Pane using the X, go to the View tab on the Ribbon and select the Pane you wish to view.

## Notes Pane

### Notes

Displays the Notes for the selected Summary Task or Task in the project. Notes are handy for entering extensive descriptions for a task. Notes entered in WBS Schedule Pro can be transferred to MS Project. Notes from MS Project can also be displayed in WBS Schedule Pro, however, Notes from MS Project are read-only in WBS Schedule Pro and cannot be edited\*.



### Some tips for working with Panes

When Panes share space, select the tab of the Pane you wish to view.

Click the tab of the desired Pane and drag it to the middle of the chart to make it "float".

Click a floating Pane's title bar and drag it back over the other tabs to make it part of the same group of Panes.

Click the Auto Hide (Push Pin) icon to dock the pane against the side or bottom of the chart. Hover over the hidden tabs to quickly display the Pane. Click the Push Pin to anchor it again so it is always visible.

Click the title bar of a Pane and drag it over the displayed screen location to "dock" it at that location.

If you hide a Pane using the X, go to the View tab on the Ribbon and select the Pane you wish to view.

\*The Notes field in MS Project can contain formatting, embedded objects, bullets, etc... Due to the limitations of MS Project, there is no way for WBS Schedule Pro or any other program to read or access the formatted Notes from Project. MS Project can only export plain text from the Notes field so rather than removing all of the Formatting from the Notes field that a user may have spent time configuring, we've decided to leave them as is. You will only be able to view and print the Notes from MS Project in WBS Schedule Pro as plain text.

## Horizontal Split

Splits the screen Horizontally.

## Vertical Split

Splits the screen Vertically.

## Full Screen

Restores any split screens to one full screen.

## Project

### Options

Display the same Options dialog found in File-Options. See [Options](#)

## Unlink

Removes the link to the current datasource.

### What it means to be Linked to a datasource

When you are linked to a datasource (such as a Microsoft Project plan), the data displayed in WBS Schedule Pro is actually stored in the datasource and not in the current WBS Schedule Pro project. The current project is only a reflection of the data in the datasource. Saving a WBS Schedule Pro project that is linked to a datasource saves the formatting options into the .wbs file but the data remains in the datasource.

### Unlinking from a Microsoft Project plan

If you create a WBS Schedule Pro project from a Microsoft Project plan, this project is linked to the MS Project plan. Any changes made in WBS Schedule Pro are immediately reflected in the Microsoft Project plan. There is a dynamic link between the Microsoft Project plan (the .mpp file) and the .wbs file. As mentioned above, when linked to a Microsoft Project plan, all data is stored in the .mpp file and the formatting options are saved in the .wbs chart file.

Unlinking a WBS Schedule Pro project from a Microsoft Project plan transfers the data into the WBS Schedule Pro project and it becomes a standalone file containing all of the data and formatting.

**Important Note #1** - Keep in mind that WBS Schedule Pro does not contain many of the advanced features of MS Project so Unlinking your project from MS Project may not save information like detailed Resource Assignments, Time Phased data, etc. into the standalone .wbs file.

**Important Note #2:** When you Unlink a WBS Schedule Pro project from a Microsoft Project plan you cannot re-link it to this same Microsoft Project plan. If you unlink a WBS Schedule Pro project from an existing Microsoft Project plan you can only send the data back to Microsoft Project as aNew Microsoft Project plan, you cannot use it to modify an existing Microsoft Project plan.

### Unlinking from an MPX or Text file

If you create a WBS Schedule Pro project from an, XML, MPX or Text file this project is linked but not dynamically. In other words, you cannot modify the WBS Schedule Project and have this modify the XML, MPX or Text file.

You can select to Unlink from an XML, MPX or Text file by selecting the Unlink command. However, Unlinking from a XML, MPX or Text file happens automatically if you change the data in the linked WBS Schedule Pro project (if you add a task, or

change a Duration, for example). WBS Schedule Pro cannot write back to the XML, MPX or Text file, and since you have changed the data it must Unlink from the XML, MPX or Text file to manage the data properly.

See also [Creating WBS charts from Microsoft Project plans](#)

## Excel

Exports the current project information from WBS Schedule Pro to Microsoft Excel using the "Export to Excel Wizard".

## Word

Exports the current project information from WBS Schedule Pro to Microsoft Word.

## Resources

Displays the Resources form for defining a list of resources for the project. Resources are the people or things that you assign to a task to perform work on that task. In WBS Schedule Pro you cannot assign a resource to a task until you define the resource in this form.

	Resource Name	Initials	Group
1	Audrey Spiller	AS	
2	Mike Roberts	MR	
3	John Smith	JS	
4	Stacy Jones	SJ	
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			

**Toolbar Buttons** – Use the buttons in the upper right corner to Cut/Copy and Paste Resources in the list, move Resources Up and Down in the list and Insert and Delete rows in the list.

**Resource Name** – Enter the resource name in this field. You can enter an individual, category of individual or any other name you want to identify and assign the resource. The Resource Name field corresponds to the Resource Names field in Microsoft Project.

**Initials** – The initials are automatically created based on the Resource Name entered. You can accept the defaults or type in a new value. You may want to display the Initials field in the task boxes as an alternative to displaying the entire Resource Name field. The Initials field corresponds to the Initials field in Microsoft Project.

Group – The Group field contains the name of the group to which each resource belongs. The Group field corresponds to the Resource Group field in Microsoft Project.

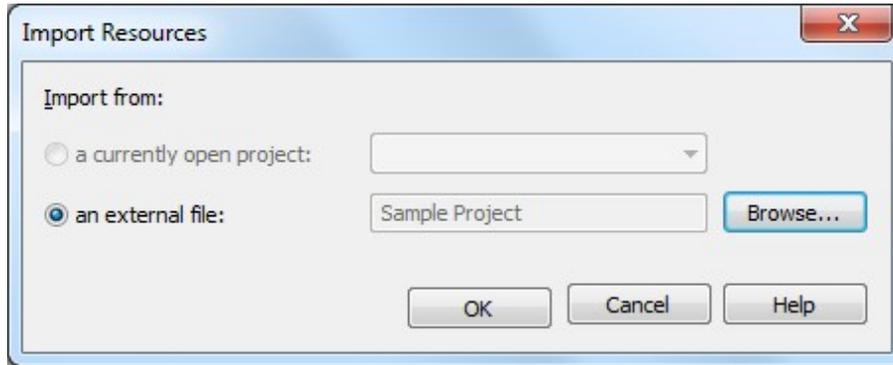
Set as Default – Select to have this list of Resources appear in all New projects.

Import – Import a list of Resources from a currently open project in WBS Schedule Pro or from a Microsoft Project plan.

Note: If the current project is linked to a Microsoft Project plan, these Resource are the same as those listed in the Resource Sheet of Microsoft Project. Any changes made in the Resources form in WBS Schedule Pro are immediately reflected in the Resource Sheet of Microsoft Project.

## Resources

Import a list of Resources from a currently open project in WBS Schedule Pro or from an external file such as a Microsoft Project plan.



## Calendar

The Calendar defines the workdays, hours in a workday and non- working days for your project. By default, when scheduling tasks, WBS Schedule Pro uses a Monday through Friday workweek and an 8 hour work day from 8:00 AM to 5:00 PM (with an hour for lunch from 12:00 PM to 1:00 PM). You can change this for the current project or change it and set it as the default for all new projects.

The screenshot shows the 'Calendar' dialog box with the following details:

- Normal Working Hours:** From: 8:00 AM, To: 12:00 PM (with a secondary row for 1:00 PM to 5:00 PM).
- Normal Working Days:** Monday, Tuesday, Wednesday, Thursday, and Friday are selected (checked). Saturday and Sunday are not selected.
- Calendar:** A grid for January 2014. The 1st is highlighted in blue, indicating it is the current day.
- For selected days:** From: 8:00 AM, To: 12:00 PM (with a secondary row for 1:00 PM to 5:00 PM).
- Buttons:** OK, Cancel, Help, Set as Default, Reset, and Go to Today.

**Normal Working Hours** - This option sets the default working hours for the Normal Working Days selected. For example, if your project uses a 4 day work week with 10 hour days (and an hour for lunch) you could set the Normal Working Hours to something like:

8:00 AM      1:00 PM  
2:00 PM      7:00 PM

**Normal Working Days** - Select the default working days for your project. If you typically work a 5 day week from Monday through Friday then you would select Monday through Friday. If you typically work a 6 day week you could set it to Monday through Saturday.

**Set as Default** - Select this to make the current Calendar the default Calendar for all new projects. If you customize a Calendar and select the Set as Default button, this

customized Calendar is used whenever a New project is created. Using the Set as Default option does not affect any existing Calendars in existing projects.

Reset - Select Reset to remove any custom settings to the current Calendar and set it to the default Calendar.

For selected days - Select a date (or dates) in the Calendar grid and use the options in the For selected days area to set the hours for these dates by entering From and To times, Reset these dates to the default or set them to be Non-Working days.

#### The Calendar File

When Set as Default is selected, a Calendar file is created and saved to the folder where you installed WBS Schedule Pro. This file is called Calendar.ctc. This calendar is then used for all new projects. Any existing WBS Schedule Pro projects are not affected. If you have an existing WBS Schedule Pro project that you want to use with this new Calendar, open that project, select Project-Calendar and choose Reset.

For more information on scheduling tasks, see [Scheduling](#)

## Baseline

### About Baselines

A Baseline is a snapshot of your project. When you take a Baseline it records certain information so that you can compare the current schedule to the Baseline Schedule. This is a convenient way to see how your project is doing compared to when you took the Baseline.

When you take a Baseline, the program copies the contents of the following fields into the corresponding Baseline fields:

- Start to Baseline Start
- Finish to Baseline Finish
- Duration to Baseline Duration
- Cost to Baseline Cost
- Work to Baseline Work

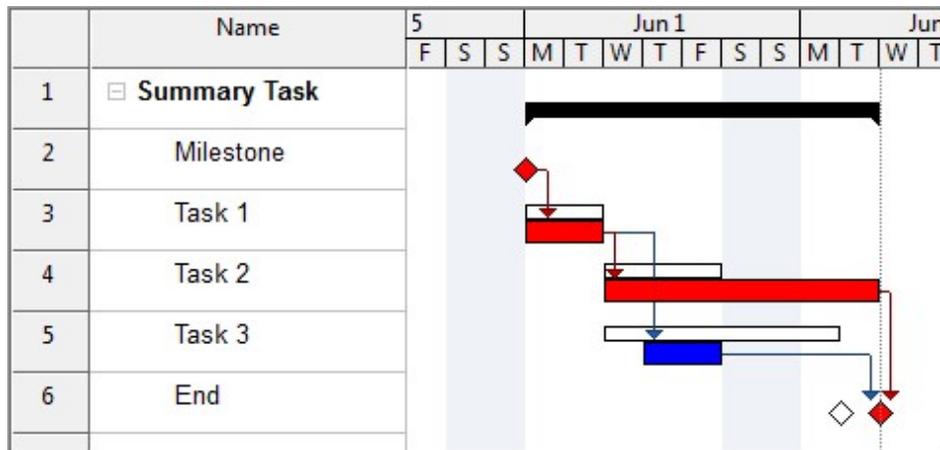
Baseline data is used to calculate Variances in the project. The following are the Variance fields calculated when a Baseline is recorded:

- Start Variance - The difference between the Start and Baseline Start.
- Finish Variance - The difference between the Finish and Baseline Finish.
- Duration Variance - The difference between the Duration and Baseline Duration.
- Cost Variance - The difference between the Cost and Baseline Cost.
- Work Variance - The difference between the Work and Baseline Work.

You can display Baseline or Variance fields in a WBS Chart, Network Chart, Gantt Chart or Task Sheet. Here is an example of Baseline and Variance fields in a Task Sheet:

	Name	Duration	Baseline Duration	Duration Variance	Start	Baseline Start	Start Variance	Finish	Baseline Finish	Finish Variance
1	<input type="checkbox"/> <b>Summary Task</b>	7d	6d	1d	Jun 1	Jun 1	0d	Jun 9	Jun 8	1d
2	Milestone	0d	0d	0d	Jun 1	Jun 1	0d	Jun 1	Jun 1	0d
3	Task 1	2d	2d	0d	Jun 1	Jun 1	0d	Jun 2	Jun 2	0d
4	Task 2	5d	3d	2d	Jun 3	Jun 3	0d	Jun 9	Jun 5	2d
5	Task 3	2d	4d	-2d	Jun 4	Jun 3	1d	Jun 5	Jun 8	-1d
6	End	0d	0d	0d	Jun 9	Jun 8	1d	Jun 9	Jun 8	1d

Baseline and Variance data can be represented graphically in a Gantt Chart. The following Gantt Chart shows Baseline information as hollow bars and diamonds. This visually shows the Variances from the current schedule.



## Taking a Baseline

The following form is used to record Baseline information.

## Save Baseline

**For all Tasks** - This sets the Baseline for the entire project. It copies the current schedule information into the Baseline fields for all Summary Tasks, Tasks and Milestones in the project.

**For Selected Tasks** - This sets the Baseline for the currently selected Task or Tasks. This is useful if you have added Tasks after taking the original Baseline and you wish to set the Baseline for a certain task (or tasks) without affecting the original Baseline.

**Rollup to Summary Tasks** - Select this option to update Summary Task Baseline information with the currently selected Task's Baseline data. This will add to or adjust the Summary Task's Baseline with the Baseline data from the selected task or tasks.

**Recalculate Summary from Tasks** - Select a Summary Task and choose this option to update the Baseline data for the selected Summary Task using the data

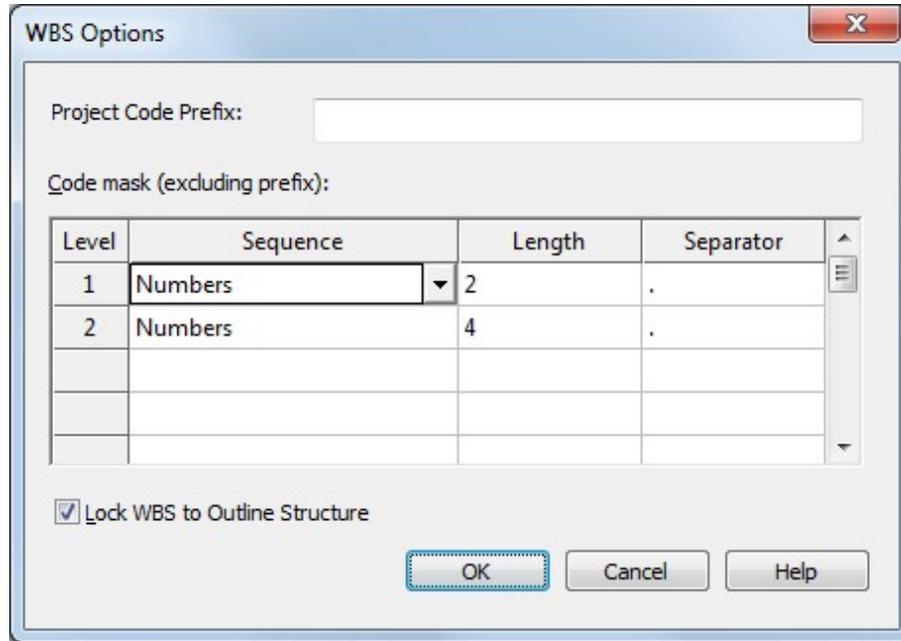
from all of its subtasks. This is useful if you have moved or deleted Tasks under a Summary Task. Moving or deleting a Task or Tasks does not automatically remove the Baseline data from their respective Summary Tasks (and it shouldn't by definition) but if you wish to update or "Re-Baseline" a Summary Task you can use this option.

**Clear All Baseline Data** - Select this option to clear all Baseline data in the project. This will remove all data from all of the Baseline fields in the current project.

Tip: If you want to clear certain Baseline fields try using the Task Sheet or Gantt Chart. Insert a column with the Baseline field(s) you want to clear, highlight data and choose Clear from the Format tab (or right-click and choose Clear selection). This will clear only the highlighted data.

## WBS Codes

Specify options for the WBS field.



The image shows a dialog box titled "WBS Options" with a close button (X) in the top right corner. It contains a text field for "Project Code Prefix", a label "Code mask (excluding prefix):", and a table with four columns: "Level", "Sequence", "Length", and "Separator". The table has three rows, with the first two rows populated. The first row has "1" in the Level column, "Numbers" in the Sequence column, "2" in the Length column, and "." in the Separator column. The second row has "2" in the Level column, "Numbers" in the Sequence column, "4" in the Length column, and "." in the Separator column. Below the table is a checked checkbox labeled "Lock WBS to Outline Structure". At the bottom are three buttons: "OK", "Cancel", and "Help".

Level	Sequence	Length	Separator
1	Numbers	2	.
2	Numbers	4	.

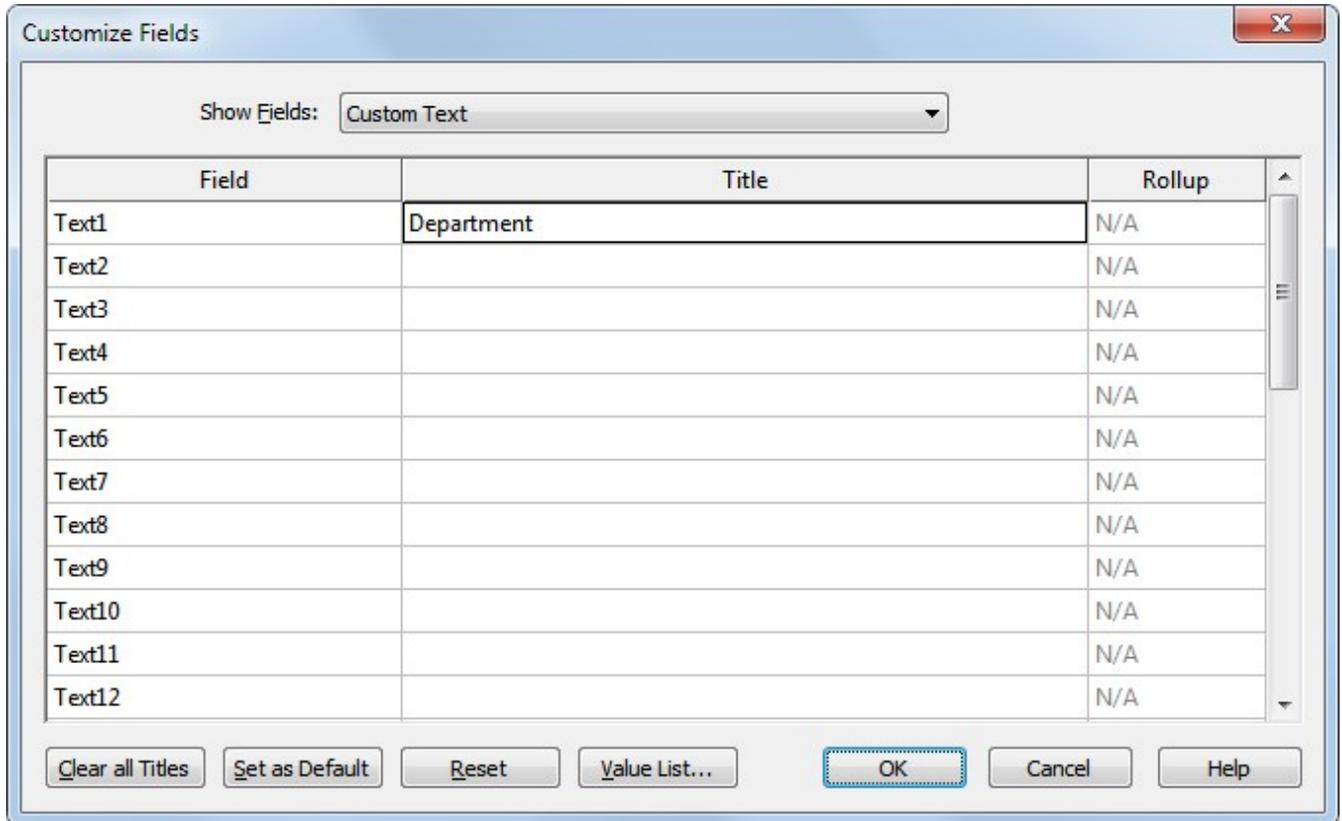
**Project Code Prefix** - Use this to place a pre-defined prefix in front of the WBS Codes in the project.

**Code mask** - Use this to force a WBS numbering scheme based on the defined Numbers and/or Characters defined at each level.

**Lock WBS to Outline Structure** - Use this to make the WBS field match the position in the hierarchy when using default Grouping. This means that when locked, as you move or reposition tasks in your project, the WBS will be updated to match the new position in the project. Unlocking allows you to create custom WBS Codes that do not update as you move tasks around. You can also have duplicate WBS Codes when unlocked.

## Fields

Rename fields, Rollup fields and create Value Lists for certain fields.



Show Fields – Select the type of field you wish to customize.

Renaming a field is useful if you are familiar with a certain term for a field and want to display that name instead of the name used in WBS Schedule Pro. For example, if you use the word Task Name instead of the word Name then you could rename the Name field to Task Name. Renaming fields is also useful if you use fields such as the Text fields or Flag fields. If you use the Text1 field to display the Department A then you could rename Text1 to Department.

Title – Enter the new name for this field. This Title will appear anywhere this field is used including in Task Boxes on the screen, in Dialog boxes and on printouts.

Rollup - Select to summarize data to each level of the project. Many fields in WBS Schedule Pro (like the Cost, Duration, Start and Finish) automatically rollup so there is no need to set these (nor is there a way to prevent their rollup). There are other fields in WBS Schedule Pro that you can use to enter your own cost, date, duration or work information into. These fields include Cost1-10, Date1-Date10, Duration1-Duration10, Number1-Number20, Start1-Start10 and, Finish1-Finish10. If you use these fields you can roll information up using the Rollup dropdown list to specify how you want the

data to rollup to each Summary level.

Note: A Rolled Up field can no longer be edited in a Summary Task since it is now calculated data at every summary level.

Clear all Titles – Removes all entries from the Title column.

Set as Default – Changes made to the Fields Name form are saved to the current project. Select the Set as Default option to make the current Field Names form the default for all new projects.

Reset – Reverts to the default list of field names. The default list of field names may be blank unless you previously customized this list and chose the Set as Default option.

Value List – Create a pre-set list of values for this field. These values appear as a drop down list of choices in the program wherever this field is displayed.

Value List: Department (Text1)

Values:

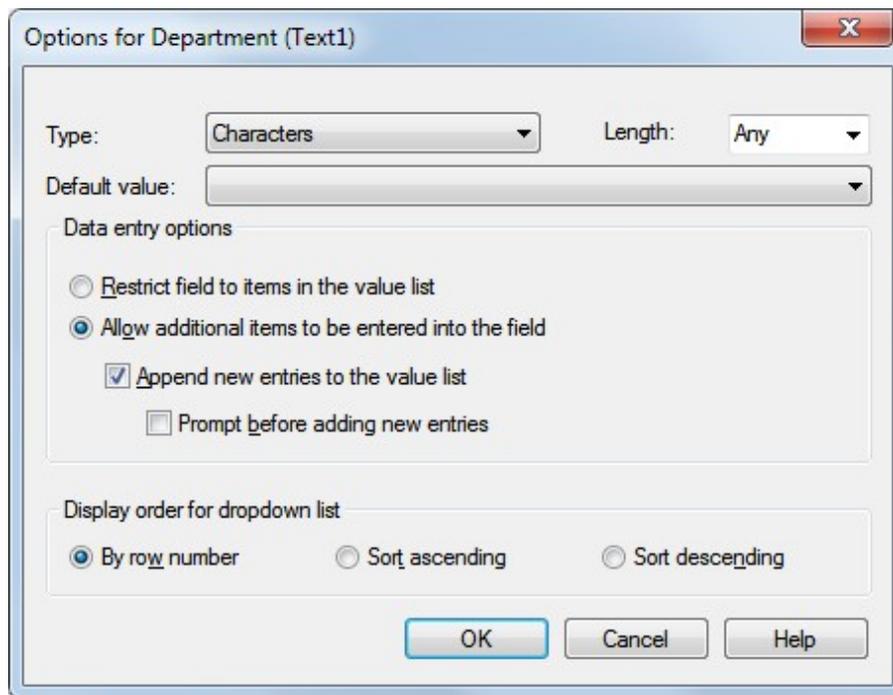
	Value	Description
1	Dept A	Department A
2	Dept B	Department B
3	Dept C	Department C
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		

OK Cancel Options... Import... Help

Using the buttons in the upper right corner of this form, Cut/Copy and Paste values, move them up/down and insert and delete rows in the list. The Load Data from Chart button on the right is useful if you have already entered values into this field before creating the Value List. Clicking the Load Data from Chart button copies all of the

contents of this field into the Value List.

Options - Displays additional options for working with the Value List



Type - Limit the values in the Value List to a certain type of character or number.

Length - Limit the values in the Value List to a certain character length.

Default Value - Select one of the values from the Value List to appear by default whenever a new task is created.

Restrict field to items in the value list - Users can only pick from the value list and cannot manually enter information into the the field.

Allow additional items to be entered into the field - User can pick from the value list OR enter information into the field.

Append new entries to the value list - Users can pick from the value list OR enter information into the field with any new values added to the value list.

Prompt before adding new entries - Prompts the user to confirm whether a new value should be added to the value list if additional items are allowed to be appended to the value list.

Display order for dropdown list - Displays the order in which the values are displayed in the dropdown list.



## Undo

Removes the last command performed in WBS Schedule Pro. When using WBS Schedule Pro to create a standalone chart, most operations can be undone.

**IMPORTANT NOTE:** When using WBS Schedule Pro to modify an existing Microsoft Project plan, certain operations cannot be undone. Adding, Deleting or Moving tasks in a chart linked to a Microsoft Project plan cannot be undone. WBS Schedule Pro communicates with Microsoft Project through OLE automation, which does not provide a method to Undo complex operations. However, some simple operations such as renaming a task can be Undone.

## Redo

Reverses the action of the Undo command. To undo recent actions one at a time, click Undo. If you didn't want to undo an action click Redo.

## Format (WBS Chart)

Fields - Summary Tasks

See [Fields - Tasks](#)

## Fields

The Format Fields dialog box allows you to define the arrangement of fields for WBS and Network Charts. You can arrange an unlimited number of fields in and around the boxes in your chart. The concept for defining fields in boxes is the same for Summary Tasks and Tasks and for WBS Charts and Network Charts and are discussed in one topic below...

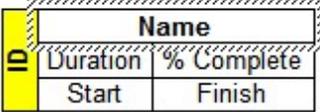
For WBS Charts, fields are defined separately for Summary Task and Task boxes and are edited using the Fields-Summary Tasks and Fields-Tasks option on the Format tab when in a WBS Chart.

For Network Charts, the arrangement of fields is the same for both Summary Task and Task boxes and are edited using the Fields option on the Format Tab when in a Network Chart.

The Format Fields dialog box allows you to define the arrangement, color, and formatting of fields within the box, however, it is not where you define the box colors, shapes and shadows. For this, see [Boxes](#)

Format Fields

Click on the box to select a cell. Drag to select additional cells.



Name	
Duration	% Complete
Start	Finish

Cell Style

Field: **Name** Label:   After

Format:   Wrap after  characters

Font: **Arial** Size:  Rotate:

Align:   Bold  Italic  Underline

Vertical:  Text:  Progress:  Fill:  Margins...

OK  
Cancel  
Help  
Copy  
Paste  
Gridlines...  
 Box Interior  
 Merge cells

Rows  
Insert Above  
Insert Below  
Delete  
 Minimize Height

Columns  
Insert Left  
Insert Right  
Delete  
 Minimize Width

## Adding/Deleting and Arranging Fields

To add fields, use the Rows and Columns buttons on the right side of form. Rows and Columns are inserted relative to the selected cell in the sample grid in the middle of the form.

### Rows

Insert Above – Adds a row above the selected cell.

Insert Below – Adds a row of below the selected cell.

Delete – Removes the entire row containing the selected cell.

Minimize Height – Makes the selected row as short as possible. This option is useful for minimizing the height of certain cells when the cells would otherwise be stretched across the row. Rows are stretched when data in one area of the row causes the entire row to be taller, or when you use the feature to “Match Box Sizes”.

Consider the example below where the text on the side makes the box tall. By making the box taller some rows need to stretch. If you didnot select the Minimize Height option on any of the rows then all rows are stretched evenly, like this:

Rotated Text	Task 1	
	5 days	0%
	1/1/14	1/7/14

If you select the second and third rows in the grid and select the Minimize Height option then it would look like this:

Rotated Text	Task 1	
	5 days	0%
	1/1/14	1/7/14

It minimizes the space in the second and third rows and stretches the first row to fill the remaining space.

Note: If you select the Minimize Height option on all of the rows and rows need to be stretched (as in this example) then it will evenly distribute the space in the rows much like the first picture above.

## Columns

Insert Left – Adds a column to the left of the selected cell.

Insert Right – Adds a column to the right of the selected cell.

Delete – Removes the entire column containing the selected cell.

Minimize Width – Makes the selected column as narrow as possible. This option is useful for minimizing the width of certain cells when the cells would otherwise be stretched across the column. Columns may need to be stretched when data in one area of the column causes the entire column to be wider, or when you use the feature to “Match Box Sizes”.

Consider the example below where the name of the task makes the box wide. By making the box wide some columns need to stretch. If you did not select the Minimize Width option on any of the columns then all columns are stretched evenly, like this:

<b>This is a long Task Name</b>		
1	5 days	0%
	1/1/14	1/7/14

If you select the first column in the grid and select the Minimize Width option then it would look like this:

<b>This is a long Task Name</b>		
1	5 days	0%
	1/1/14	1/7/14

It minimizes the space in the first column and evenly spaces the remaining columns.

Note: If you select the Minimize Width option on all of the columns and columns need to be stretched (as in this example) then it will evenly distribute the space in the columns much like the first picture above.

Merge Cells – Makes a field span more than one cell. To merge cells, click and drag to select multiple cells and then select the Merge Cells option. In the example below, the WBS field is added above the Name field and merged into one cell. To do this:

<b>Name</b>	
Duration	% Complete
Start	Finish

Insert a Row above the Name field.

<b>WBS</b>	
<b>Name</b>	
Duration	% Complete
Start	Finish

<b>WBS</b>	
<b>Name</b>	
Duration	% Complete
Start	Finish

Click in the WBS field and drag from the WBS cell to the right to highlight both cells.

Select the Merge Cells option. Once merged, align the text in this new space using the Align options.

**Box Interior** – Defines the box interior so fields can be displayed outside of the box. To define the “Box Interior”, click and drag across the fields (cells) that you want to include inside the box and select Box Interior.

Using the above example, to make the WBS field appear outside of the box, click and drag across the Name, Duration, %Complete, Start and Finish fields to highlight these field. Then, select the Box Interior option.

<b>WBS</b>	
<b>Name</b>	
Duration	% Complete
Start	Finish

Highlight the fields that make up the interior of the box.

<b>WBS</b>	
<b>Name</b>	
Duration	% Complete
Start	Finish

Click the Box Interior option.

Selecting the Box Interior option removes the box border and any gridlines associated with the cell outside of the box. To replace the border and gridlines, deselect the box interior option and then select the Gridlines option, and choose Set All to restore all of the Gridlines between the cells.

## Formatting the Fields

To format a field, select the field (cell) by clicking on the appropriate field in the sample grid in the middle of the form. Then, select the formatting options in the Cell Style area.

Following is an explanation of each of the options in Cell Style:

**Field** – Select the drop down arrow to display a complete list of fields. Choose a field from this list to display in the selected cell. For a list of fields, see [Fields in WBS Schedule Pro](#).

**Label** – Enter text to display before or after the data in the selected cell. Leave the After checkbox unchecked to display text to the left of the data in the cell or click the After checkbox to display the label to the right of the data in the cell.

Task 1			Task 1		
1	5 days	0%	ID: 1	5 days	0%
	1/1/14	1/7/14		Start: 1/1/14	Finish: 1/7/14

No Labels for  
the cells.

ID, Start and Finish  
Labels have been added.

**Format** – Displays options for formatting the data for the selected cell such as different display formats for date fields. Some fields do not have formatting options and this option is unavailable.

**Wrap after xx characters** – Specify the number of characters on which to “Word Wrap”. WBS Schedule Pro attempts to wrap the line of text at the number of characters specified. However, it can only wrap on a space and may wrap at more or less than the number of characters specified.

**Font** – Sets the font type for the selected cell.

**Size** – Sets the font size for the selected cell.

**Rotate** – Displays the text in the cell normal (0°), top-to-bottom (90°), or bottom-to-top (270°).

**Align** – Sets the alignment of the text Horizontally to the Left, Center or Right within the cell.

**Vertical** – Sets the alignment of the text Vertically to the Top, Center or Bottom within the cell.

**Bold/Italic/Underline** – Sets the text to Bold, Italic or Underlined for the selected cell.

**Text** – Sets the color for the text in the cell. Choose the Same as Box Border option to display the text the same color as the box border. This is useful, for example, if you were displaying Critical tasks in the chart as red boxes, and Noncritical tasks in the chart as Blue boxes, and you wanted the text within the boxes to match these colors.

**Fill** – Sets the background color for the cell.

**Progress** – Displays a fill pattern within the cell based on the completion (% Complete) of the task.

**Margins** – Allows you to set the left, right, top and bottom margins around the text in the selected cell.

## Additional Options

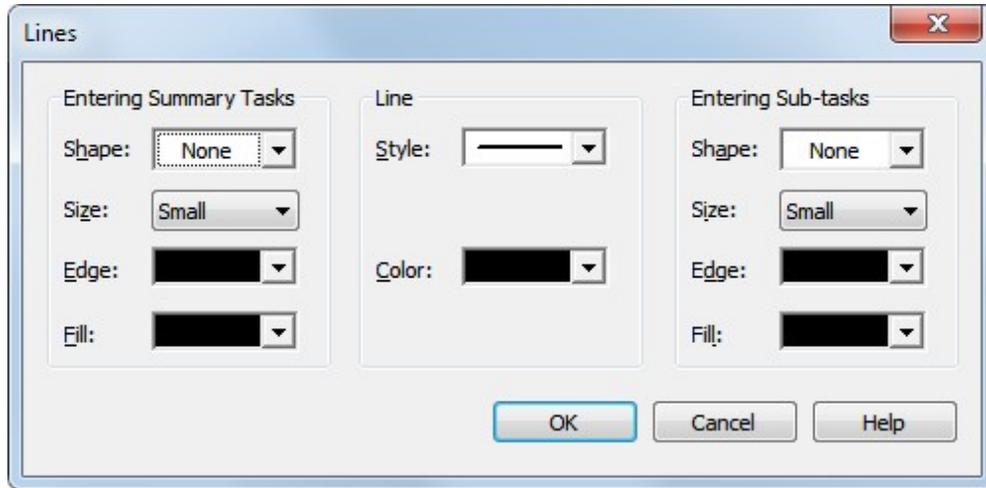
Gridlines – Select to configure the gridlines between the fields. The separating lines between the fields that are displayed are referred to as Gridlines. You can choose to turn them all off (Clear All), turn them all on (Set All), or individually select which gridlines appear.

Copy – Select to copy the arrangement of fields for pasting into the Summary Task Fields or Task Fields form. For example, if you are currently configuring Task Fields and you wanted to use this same arrangement of fields for your Summary Tasks, select Copy while in the Task Fields form, then go to the Summary Task Fields dialog box and press Paste.

Paste – Select to paste the copy of the fields into the current Summary Task Fields or Task Fields form. You must have previously selected Copy from either the Summary Task Fields or Task Fields dialog box for this to work.

## Lines

Defines styles, shapes and colors for the connecting lines in the WBS Chart.



Exiting Summary Tasks - Define an arrowhead style (or none at all) for lines coming out of a summary box. Choose Shape to define the arrowhead type, Size for the thickness of the arrowhead, Edge for the outside edge color of the arrowhead and Fill for the inside color of the arrowhead.

Line – Define the connecting line thickness and style. Choose Style for the various line styles and Color for a list of available colors.

Entering Sub-tasks – Define an arrowhead style (or none at all) for lines going into a task box. Choose Shape to define the arrowhead type, Size for the thickness of the arrowhead, Edge for the outside edge color of the arrowhead and Fill for the inside color of the arrowhead.

## Boxes

Specify Box Styles such as Shadow, Background Fill and Borders based on different conditions. Box styles can be based on the following:

1. By the Critical and Noncritical status of tasks.
2. Using the Flag Fields set on each task.
3. By the Progress (% Complete) of the tasks.
4. By the Level of the Summary Task, Task or Milestone in the chart.

Shadows, Fill and Borders can be based on the same condition or can be combined. An example of combining conditions could be Shadows based on whether a task is Critical or Noncritical and the Fill color based on the Progress of a task.

Tip: You can rename the entries in the Box Styles list by selecting Project-Fields. For example, Critical Task can be renamed to Critical Path Activity. The renamed entries are also used when the Legend for Box Styles is printed.

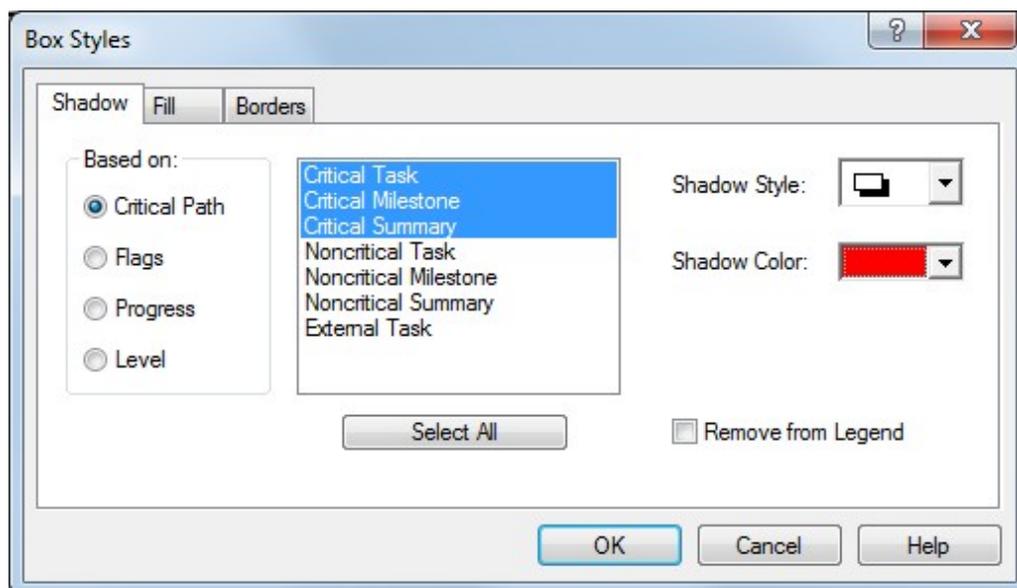
Tip #2: Tip: If you change settings in Box Styles and some boxes on the screen do not update to the new style you may have set Custom Box Settings on those boxes, see [Custom Box Settings](#). To Reset all of the boxes in the chart and use the chart-wide settings defined in Box Styles, press Ctrl-A in your chart, right-click on any task and select Reset. This will remove all Custom Box Settings in the chart.

The conditions on which to base the Shadows, Fill colors and Borders are described below.

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### Based on Critical Path

Set the Shadow, Fill and/or Border attributes for Tasks, Summary Tasks and Milestones in the chart based on the Critical or Noncritical status of these items.



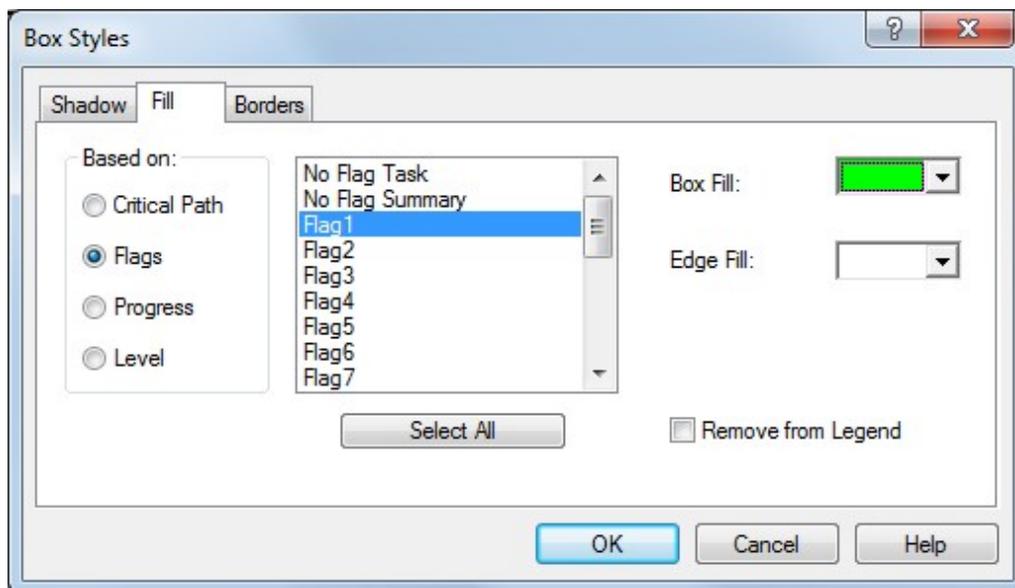
To select multiple items in the list, click and drag across these items or Ctrl-Click with your mouse to select multiple items.

Click Remove from Legend to prevent the selected item from appearing the the legend when printed.

### Based on Flags

Set the Shadow, Fill and/or Border attributes for items in the chart based on Flag settings. Flags in WBS Schedule Pro are simple Yes/No fields that you can set on a task. There are 20 Flag fields (Flag1 through Flag20). By using the Flag fields, styles can be defined for different flags and then set on specific tasks to apply that style to that task.

Note: The first Flag on a task takes precedence so if you have Flag2 and Flag3 set on a task it will display as Flag2.



For example, if you wanted some boxes in your chart to be Green, some Purple and others Yellow then you could define the Flag1 Fill to be Green, Flag2 Fill to Purple and Flag3 to Yellow. Then for each task that you want to be Green you would double-click that task, select the Flag tab in the Task Information dialog box and click Flag1. For each task that you want to be Purple you would select those tasks, set Flag2 and so on.

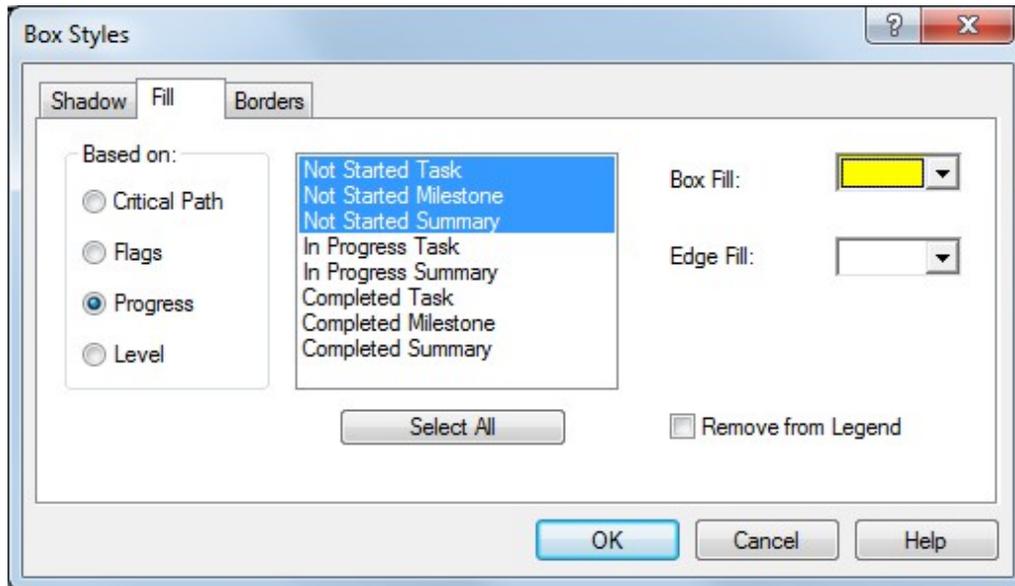
If you are using Microsoft Project, the Flag fields in WBS Schedule Pro correspond directly to the Flag fields in Microsoft Project. They can be set in Microsoft Project or in WBS Schedule Pro.

Click Remove from Legend to prevent the selected item from appearing the the legend when printed.

---

### Based on Progress

Set the Shadow, Fill and/or Border attributes for Tasks, Summary Tasks and Milestones in the chart based on the progress of these items.



You can define colors for Summary Tasks, Tasks and Milestones that have not started, are in progress or have completed. The % Complete (percent complete) field is used to determine the progress of a task using the following definition:

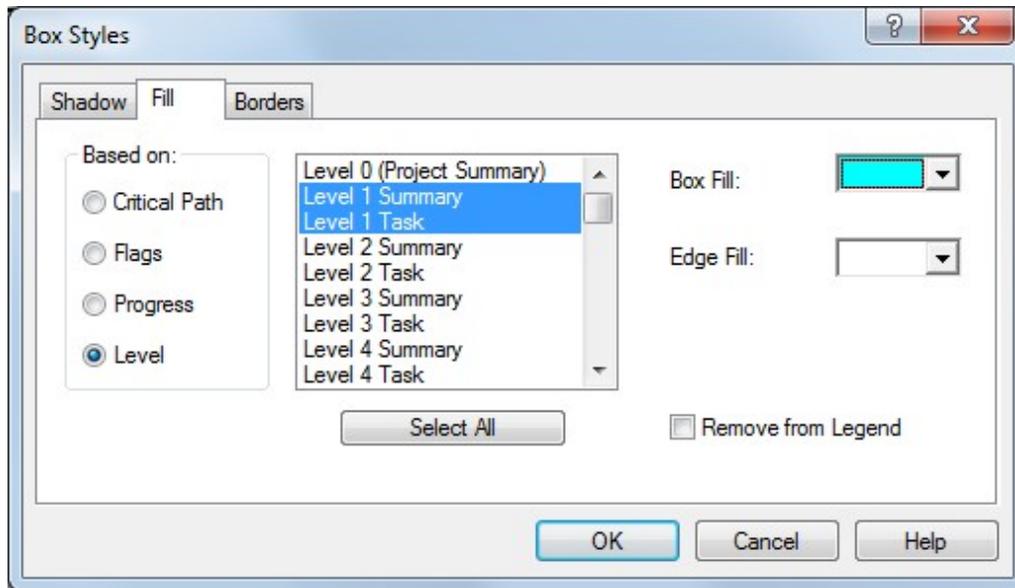
1. If a task has 0 (zero) in the % Complete field then the task is considered Not Started.
2. If a task has between 1 and 99 in the % Complete field then the task is considered In Progress.
3. If a task has 100 in the % Complete field then the task is considered to be Completed.

Click Remove from Legend to prevent the selected item from appearing the the legend when printed.

---

### Based on Level

Set the Shadow, Fill and/or Border attributes for Summary Tasks, Tasks (including Milestones) in the chart based on the current Level of these items in the chart.



You can define colors for Summary Tasks and Tasks based on their Level in the current chart.

Click Remove from Legend to prevent the selected item from appearing the the legend when printed.

---

### Shadow Settings

Style – Define the style of the shadow or choose None for no shadow.

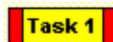
Color – Define the shadow color from the list of colors.

---

### Fill Settings

Box Fill – Define the color of the interior of the box.

Edge Fill – Define the color of the outside edge of the box. The Edge Fill color only applies if you have defined a Border Style that contains an area (edge) outside of the box. For example:




---

### Borders Settings

Style – Define the shape of the box by choosing from the various styles in this list.

Width – Define the thickness of the border by choosing Thin, Medium or Thick from the list.

Color – Define the color of the box border from the list of colors.

---

### Individually Changing Box Styles in a chart

If you want to change the box styles of select boxes in a chart, you do not need to use the Box Styles dialog box to do this. Instead, just select a box on the screen, right-click and select Custom Box Settings... The Custom Box Settings dialog box allows you to change the selected box(es) as exceptions to the Box Styles definition described above. The overriding style settings remain a part of that box until you delete the task or Reset it using the Custom Box Settings dialog box. See also [Custom Box Settings](#)

## Overall Style

Defines the chart-wide arrangement style of Summary Tasks and Tasks in the WBS Chart. The style types are defined below but are applied to the entire WBS Chart rather than individually selected items.

## Orientation

Defines the chart-wide direction of boxes in the WBS Chart.

## Between Summaries

Click to increase or decrease the distance between the Summary Tasks in the WBS Chart.

## Between Tasks

Click to increase or decrease the distance between the Tasks in the WBS Chart.

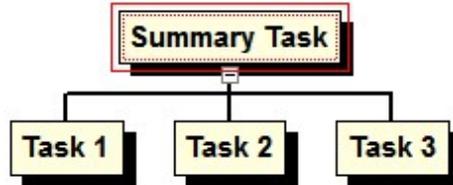
## To Subtasks

Click to increase or decrease the distance between the Summary Tasks and their Subtasks in the WBS Chart.

## Org Chart Style

Clicking the Org Chart Style button on the Ribbon changes the way the items immediately below the selected Summary Task are displayed. This button only changes the arrangement of items one level below the selected Summary Task and overrides the chart-wide Overall Style for the Summary Task.

The arrangement of the Tasks below the Summary Task when using the Org Chart Style button is left to right.



To Reset the arrangement of subtasks below a selected Summary Task, right-click on a Summary Task and select Reset-Custom Subtask Arrangement.

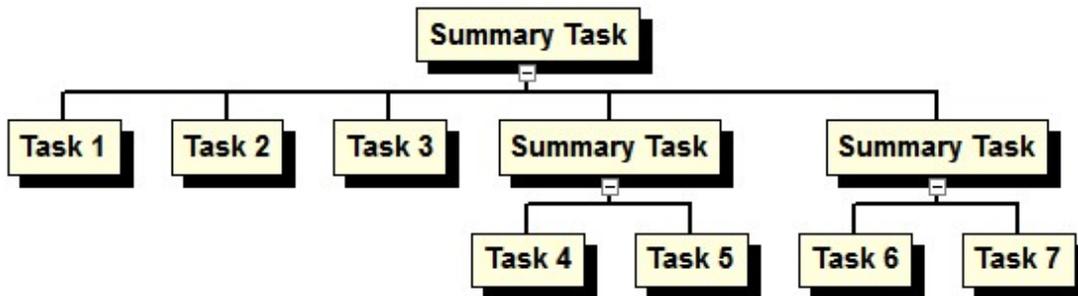
The chart-wide arrangement for the entire WBS chart is set in Format-Overall Style. See [Overall Style](#)

## WBS Chart Style

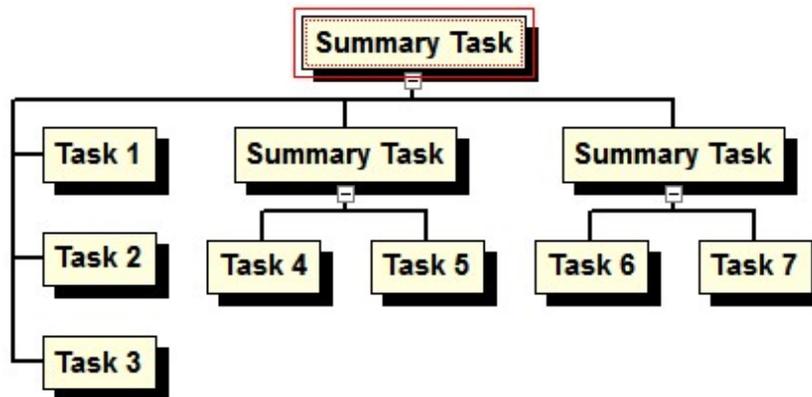
Clicking the WBS Chart Style button on the Ribbon changes the way the items immediately below the selected Summary Task are displayed. This button only changes the arrangement of items one level below the selected Summary Task and overrides the chart-wide Overall Style for the Summary Task.

The arrangement of the items below a Summary Task when using the WBS Chart Style button is to display Tasks vertically but Summary Tasks left to right.

For example:



This chart has an Overall Style of Org Chart. All boxes are displayed left to right below their respective Summary Tasks.



After selecting the top Summary Task and clicking the WBS Chart Style button it stacks Tasks vertically while leaving the second level Summary Tasks displayed left to right.

To Reset the arrangement of subtasks below a selected Summary Task, right-click on a Summary Task and select Reset-Custom Subtask Arrangement.

The chart-wide arrangement for the entire WBS chart is set in Format-Overall Style. See [Overall Style](#)

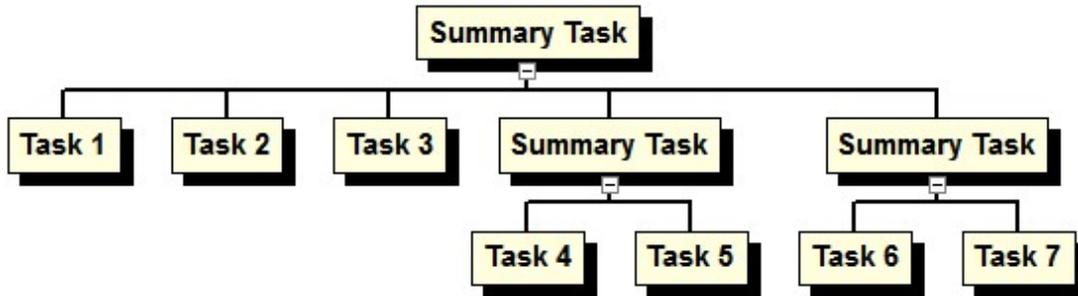


## List All Style

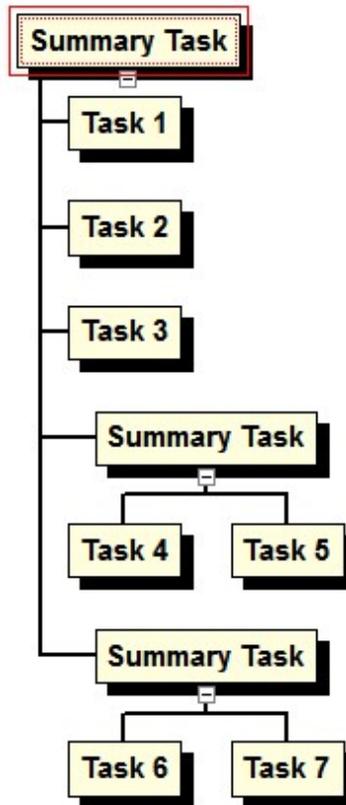
Clicking the List All Style button on the Ribbon changes the way the items immediately below the selected Summary Task are displayed. This button only changes the arrangement of items one level below the selected Summary Task and overrides the chart-wide Overall Style for the Summary Task.

The arrangement of the items below a Summary Task when using the List All Style button is to display all items vertically (Tasks and Summary Tasks).

For example:



This chart has an Overall Style of Org Chart. All boxes are displayed left to right below their respective Summary Tasks.



After selecting the top Summary Task and clicking the List All Style button it stacks the Tasks and Summary Tasks vertically but only those directly below the top box.

To Reset the arrangement of subtasks below a selected Summary Task, right-click on a Summary Task and select Reset-Custom Subtask Arrangement.

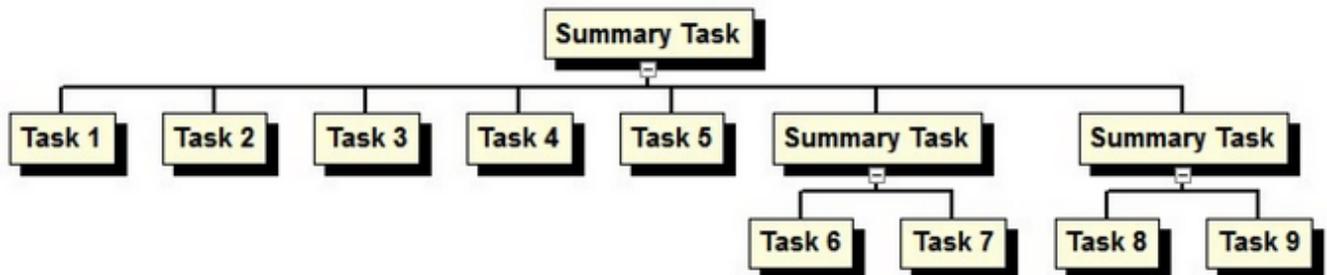
The chart-wide arrangement for the entire WBS chart is set in Format-Overall Style. See [Overall Style](#)

## WBS Style 2 Columns

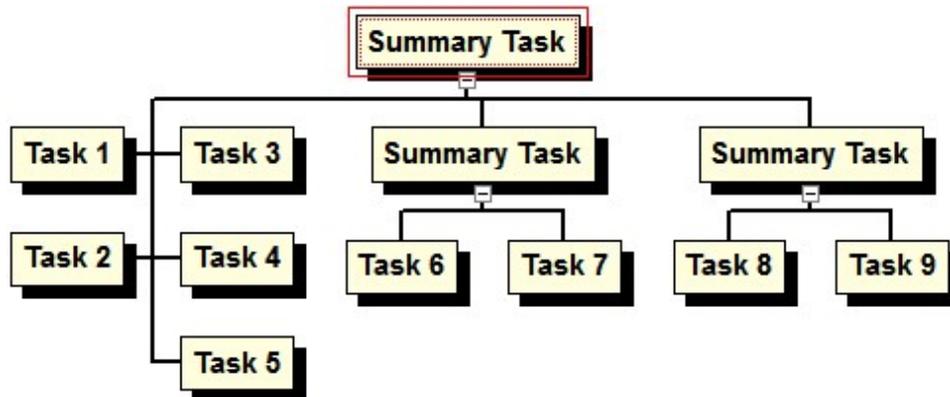
Clicking the WBS Style 2 Columns button on the Ribbon changes the way the items immediately below the selected Summary Task are displayed. This button only changes the arrangement of items one level below the selected Summary Task and overrides the chart-wide Overall Style for the Summary Task.

The arrangement of the items below a Summary Task when using the WBS Style 2 Columns button is to display Tasks vertically in 2 columns but display Summary Tasks left to right.

For example:



This chart has an Overall Style of Org Chart. All boxes are displayed left to right below their respective Summary Tasks.



After selecting the top Summary Task and clicking the WBS Style 2 Columns button it stacks Tasks vertically in 2 columns while leaving the second level Summary Tasks displayed left to right.

To Reset the arrangement of subtasks below a selected Summary Task, right-click on a Summary Task and select Reset-Custom Subtask Arrangement.

The chart-wide arrangement for the entire WBS chart is set in Format-Overall Style. See [Overall Style](#)

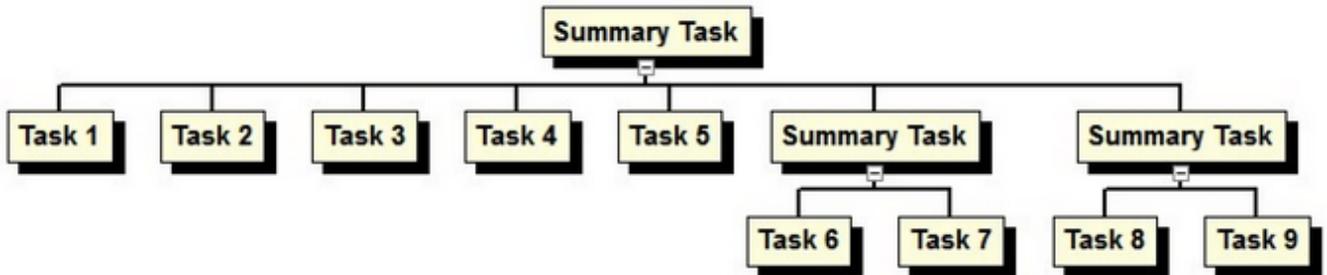


## List All Style 2 Columns

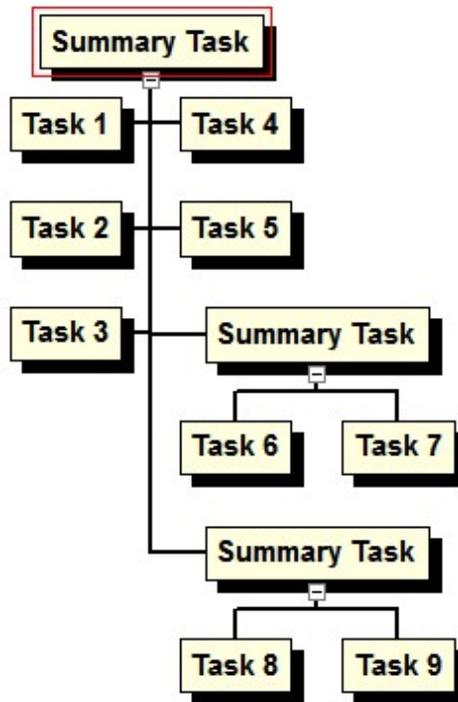
Clicking the List All Style 2 Columns button on the Ribbon changes the way the items immediately below the selected Summary Task are displayed. This button only changes the arrangement of items one level below the selected Summary Task and overrides the chart-wide Overall Style for the Summary Task.

The arrangement of the items below a Summary Task when using the List All Style 2 Columns button is to display all items vertically in 2 columns (Tasks and Summary Tasks).

For example:



This chart has an Overall Style of Org Chart. All boxes are displayed left to right below their respective Summary Tasks.



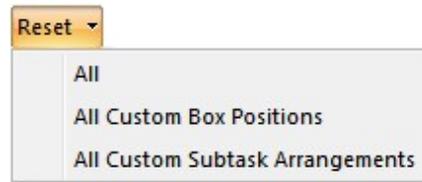
After selecting the top Summary Task and clicking the List All Style 2 Columns button it stacks the Tasks and Summary Tasks vertically but only those directly below the top box.

To Reset the arrangement of subtasks below a selected Summary Task, right-click on a Summary Task and select Reset-Custom Subtask Arrangement.

The chart-wide arrangement for the entire WBS chart is set in Format-Overall Style. See [Overall Style](#)

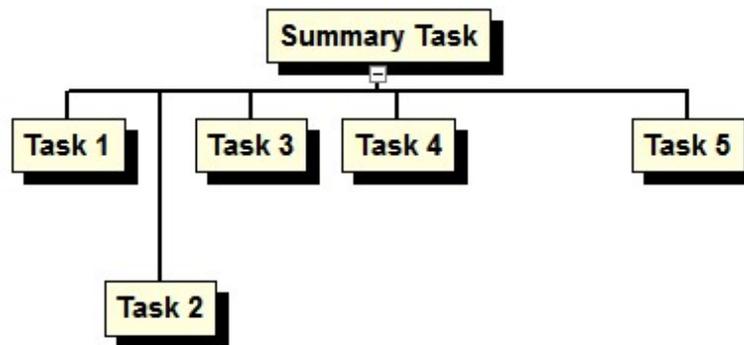
## Reset

Removes custom box positioning or custom arranging of subtasks from the WBS Chart. Select All to remove both Custom Box Positions and Custom Subtask Arrangements or select one from the list. Each is described below.

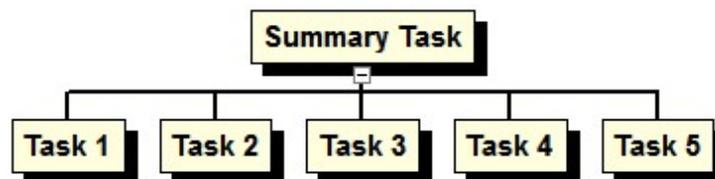


## All Custom Box Positions

In a WBS Chart you can click and drag boxes to reposition them in the chart. Click the edge of a box to move it. In the example below, Task 2 has been moved down and Task 5 has been moved to the right.

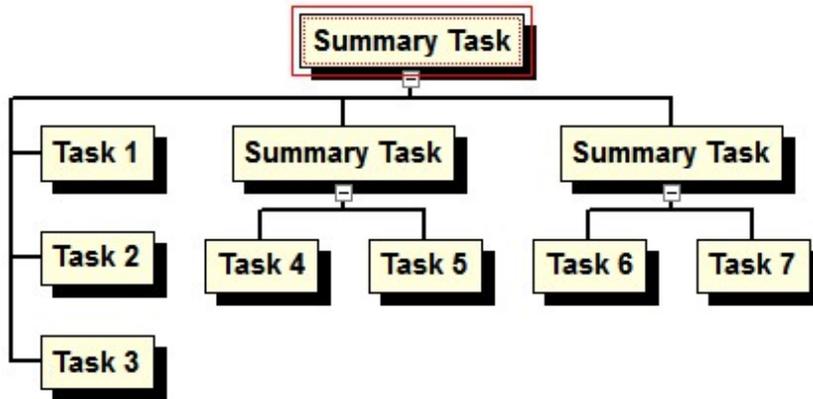


Selecting All Custom Box Positions would move all boxes back to their default positions as defined in the Default Spacing area of the Format tab. Like this:

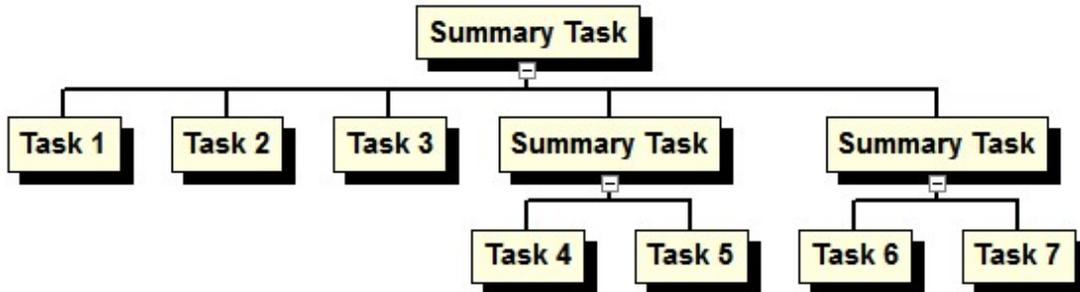


## All Custom Subtask Arrangements

In a WBS Chart you can individually arrange the subtasks for a selected Summary Task. Click a Summary Task and select one of the 5 buttons in the Individually Arrange Subtasks area of the Format tab. In the example below, the top Summary Task was selected when the WBS Chart Style button was selected:



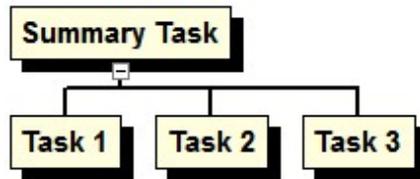
Selecting All Custom Subtask Arrangements would arrange all boxes in the same style as defined in the Overall Style drop down list in the Format tab. In this example, the Overall Style was set to Org Chart which gives this chart when reset:



## Left

Overrides the default alignment of a selected Summary Task over its subtasks. The default alignment of Summary Tasks is found by right-clicking in a WBS chart and selecting Format Chart.

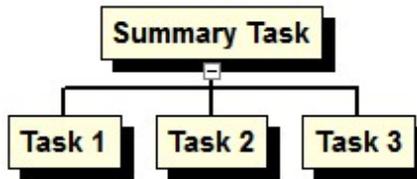
An example of Left Align for a Summary Task:



## Center

Overrides the default alignment of a selected Summary Task over its subtasks. The default alignment of Summary Tasks is found by right-clicking in a WBS chart and selecting Format Chart.

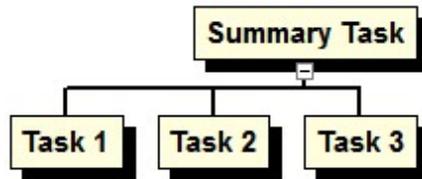
An example of Center Align for a Summary Task:



## Right

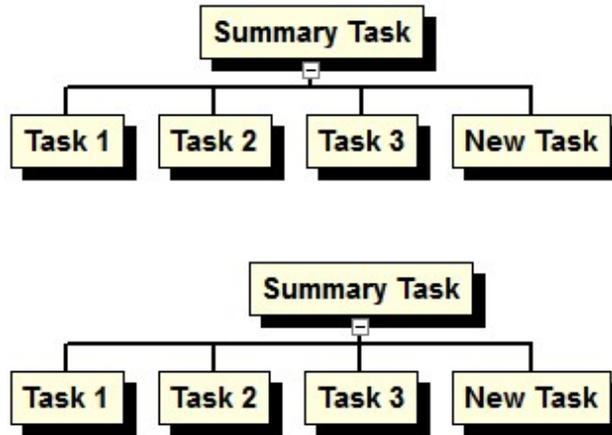
Overrides the default alignment of a selected Summary Task over its subtasks. The default alignment of Summary Tasks is found by right-clicking in a WBS chart and selecting Format Chart.

An example of Right Align for a Summary Task:



## Align

Aligns the connector of the selected Summary Task with the closest vertical line of its subtasks. This overrides the default behavior of the Align Connectors option found by right-clicking in a WBS chart and selecting Format Chart. For example, selecting Align would place the Summary Task over Task 3 as shown:



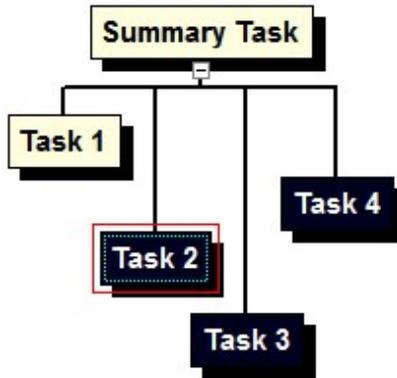
Align Boxes toolbar button

Reset Position – Removes any manual alignments made to the selected task(s) and reverts to using the default alignment settings as defined in the Format-Chart dialog box.

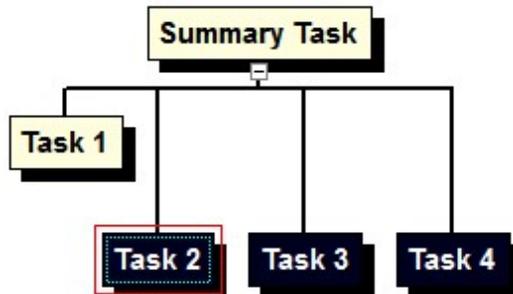
Note: You can also align/arrange Tasks in the WBS chart by clicking and dragging the edge of a Task's box to the desired location. See Copying [Moving and Repositioning Tasks](#) for this related topic.

## Align Boxes

Lines up all of the selected boxes to be even with the "current" box (the one with the red box around it). For example, with several tasks highlighted but with Task 2 the current task:



Selecting the Align Boxes button displays the following:



## Height

Select the way box height is determined throughout the WBS Chart. The available options are:

Don't Match - Box height for all Summary Task and Task boxes are sized independently based on the amount of text in a box, fonts, fields, etc.

Match All – Box height for all Summary Task and Task boxes are made equal in size to the tallest box.

Match Summary Tasks and Tasks Independently – All Summary Task boxes are made equal in height to the tallest Summary Task box and all Task boxes are made equal in height to the tallest Task box.

Match Summary Tasks Only – All Summary Task boxes are made equal in height to the tallest Summary Task box and all Task boxes are sized independently.

Match Tasks Only – All Task boxes are made equal in height to the tallest Task box and all Summary Task boxes are sized independently.

## Width

Select the way box width is determined throughout the WBS Chart. The available options are:

Don't Match - Box width for all Summary Task and Task boxes are sized independently based on the amount of text in a box, fonts, fields, etc.

Match All – Box width for all Summary Task and Task boxes are made equal in size to the widest box.

Match Summary Tasks and Tasks Independently – All Summary Task boxes are made equal in width to the widest Summary Task box and all Task boxes are made equal in width to the widest Task box.

Match Summary Tasks Only – All Summary Task boxes are made equal in width to the widest Summary Task box and all Task boxes are sized independently.

Match Tasks Only – All Task boxes are made equal in width to the widest Task box and all Summary Task boxes are sized independently.

## Outline Symbols

Turns the Outline Symbols on and off.

Outline Symbols allow you to quickly expand and collapse subtasks of a selected Summary Task by clicking the small symbols displayed next to the Summary Task. If Outline Symbols are displayed in the WBS chart, a Summary Task that has hidden tasks will display a small box with a plus sign (+). The plus sign indicates that there are subtasks hidden below the Summary Task. Click this to reveal these tasks. Click the minus sign (-) to hide all tasks below the selected Summary Task.

Outline Symbols can be positioned in different places on the Summary Task boxes. Right-click in the WBS Chart and select Format Chart to change the location of the Outline Symbols on the Summary Task boxes.

## Hyperlink Symbols

Turns the Hyperlink Symbols on and off.

Hyperlink Symbols allow you to quickly jump to the Hyperlink associated with a task by clicking the small symbol displayed next to the task. If Hyperlink Symbols are displayed in a WBS or Network chart, a Summary Task or Task that has a Hyperlink will display a small box next to that task. Click this box to go to that Hyperlink.

Hyperlink Symbols can be positioned in different places on the Summary Task and Task boxes. Right-click in a chart and select Format-Chart to change the location of the Hyperlink Symbols.

## Progress Marks

Turns the Progress Marks on and off in the WBS Chart.

Progress Marks indicate the progress of tasks (and summary tasks) by placing an X or a single diagonal line through the task box based on the Percent Complete of the task. Progress Marks use the % Complete field to determine the progress of the tasks in the WBS Chart using the following rules:

1. Displays an X through the box if the task is 100% complete.
2. Displays a diagonal line through the box if the task is 1% to 99% Complete (in progress).
3. Does not display Progress Marks if the task is 0% complete.

Using Progress Marks is one of a number of different ways to display progress in a WBS Chart. You can also show progress using the following features:

Use Colors and Box Styles to display progress for your tasks in the WBS Chart – See [Box Style](#)

Color a field background for task boxes based on progress – See [Task Boxes](#)

## Format (Network Chart)

### Fields

The Format Fields dialog box allows you to define the arrangement of fields for WBS and Network Charts. You can arrange an unlimited number of fields in and around the boxes in your chart. The concept for defining fields in boxes is the same for Summary Tasks and Tasks and for WBS Charts and Network Charts and are discussed in one topic below...

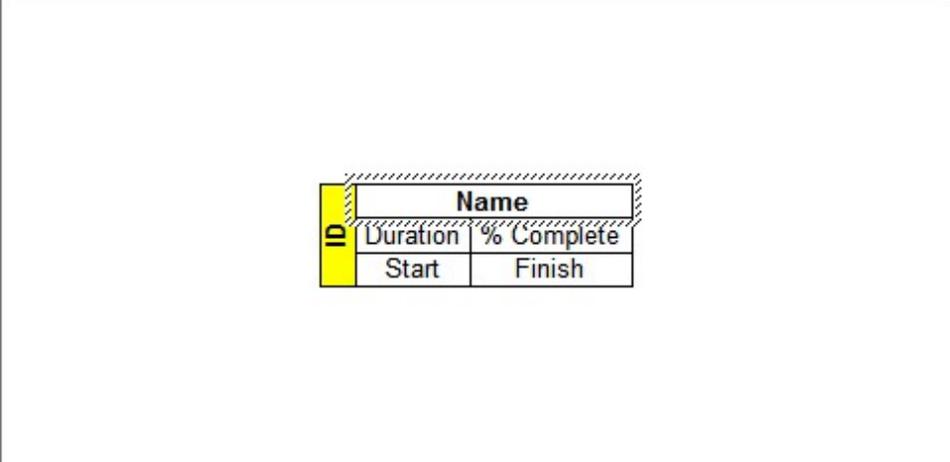
For WBS Charts, fields are defined separately for Summary Task and Task boxes and are edited using the Fields-Summary Tasks and Fields-Tasks option on the Format tab when in a WBS Chart.

For Network Charts, the arrangement of fields is the same for both Summary Task and Task boxes and are edited using the Fields option on the Format Tab when in a Network Chart.

The Format Fields dialog box allows you to define the arrangement, color, and formatting of fields within the box, however, it is not where you define the box colors, shapes and shadows. For this, see [Boxes](#)

Format Fields

Click on the box to select a cell. Drag to select additional cells.



Cell Style

Field: Name    Label:     After

Format:     Wrap after 20 characters

Font: Arial    Size: 10    Rotate: 0°

Align: Center     Bold    Text: [black]    Progress: None

Vertical: Center     Italic    Fill: None    Margins...

Underline

Rows

Insert Above

Insert Below

Delete

Minimize Height

Columns

Insert Left

Insert Right

Delete

Minimize Width

## Adding/Deleting and Arranging Fields

To add fields, use the Rows and Columns buttons on the right side of form. Rows and Columns are inserted relative to the selected cell in the sample grid in the middle of the form.

### Rows

Insert Above – Adds a row above the selected cell.

Insert Below – Adds a row of below the selected cell.

Delete – Removes the entire row containing the selected cell.

Minimize Height – Makes the selected row as short as possible. This option is useful for minimizing the height of certain cells when the cells would otherwise be stretched across the row. Rows are stretched when data in one area of the row causes the entire row to be taller, or when you use the feature to “Match Box Sizes”.

Consider the example below where the text on the side makes the box tall. By making the box taller some rows need to stretch. If you did not select the Minimize Height option on any of the rows then all rows are stretched evenly, like this:

Rotated Text	Task 1	
	5 days	0%
	1/1/14	1/7/14

If you select the second and third rows in the grid and select the Minimize Height option then it would look like this:

Rotated Text	Task 1	
	5 days	0%
	1/1/14	1/7/14

It minimizes the space in the second and third rows and stretches the first row to fill the remaining space.

Note: If you select the Minimize Height option on all of the rows and rows need to be stretched (as in this example) then it will evenly distribute the space in the rows much like the first picture above.

## Columns

Insert Left – Adds a column to the left of the selected cell.

Insert Right – Adds a column to the right of the selected cell.

Delete – Removes the entire column containing the selected cell.

Minimize Width – Makes the selected column as narrow as possible. This option is useful for minimizing the width of certain cells when the cells would otherwise be stretched across the column. Columns may need to be stretched when data in one area of the column causes the entire column to be wider, or when you use the feature to “Match Box Sizes”.

Consider the example below where the name of the task makes the box wide. By making the box wide some columns need to stretch. If you did not select the Minimize Width option on any of the columns then all columns are stretched evenly, like this:

This is a long Task Name		
1	5 days	0%
	1/1/14	1/7/14

If you select the first column in the grid and select the Minimize Width option then it would look like this:

This is a long Task Name		
1	5 days	0%
	1/1/14	1/7/14

It minimizes the space in the first column and evenly spaces the remaining columns.

Note: If you select the Minimize Width option on all of the columns and columns need to be stretched (as in this example) then it will evenly distribute the space in the columns much like the first picture above.

Merge Cells – Makes a field span more than one cell. To merge cells, click and drag to select multiple cells and then select the Merge Cells option. In the example below, the WBS field is added above the Name field and merged into one cell. To do this:

Name	
Duration	% Complete
Start	Finish

Insert a Row above the Name field.

WBS	
Name	
Duration	% Complete
Start	Finish

Click in the WBS field and drag from the WBS cell to the right to highlight both cells.

WBS	
Name	
Duration	% Complete
Start	Finish

Select the Merge Cells option. Once merged, align the text in this new space using the Align options.

Box Interior – Defines the box interior so fields can be displayed outside of the box. To define the “Box Interior”, click and drag across the fields (cells) that you want to include inside the box and select Box Interior.

Using the above example, to make the WBS field appear outside of the box, click and drag across the Name, Duration, %Complete, Start and Finish fields to highlight these field. Then, select the Box Interior option.

WBS	
Name	
Duration	% Complete
Start	Finish

Highlight the fields that make up the interior of the box.

WBS	
Name	
Duration	% Complete
Start	Finish

Click the Box Interior option.

Selecting the Box Interior option removes the box border and any gridlines associated with the cell outside of the box. To replace the border and gridlines, deselect the box interior option and then select the Gridlines option, and choose Set All to restore all of the Gridlines between the cells.

### Formatting the Fields

To format a field, select the field (cell) by clicking on the appropriate field in the sample grid in the middle of the form. Then, select the formatting options in the Cell Style area.

Following is an explanation of each of the options in Cell Style:

**Field** – Select the drop down arrow to display a complete list of fields. Choose a field from this list to display in the selected cell. For a list of fields, see [Fields in WBS Schedule Pro](#).

**Label** – Enter text to display before or after the data in the selected cell. Leave the After checkbox unchecked to display text to the left of the data in the cell or click the After checkbox to display the label to the right of the data in the cell.

Task 1		
1	5 days	0%
	1/1/14	1/7/14

No Labels for the cells.

Task 1		
ID: 1	5 days	0%
	Start: 1/1/14	Finish: 1/7/14

ID, Start and Finish Labels have been added.

**Format** – Displays options for formatting the data for the selected cell such as different display formats for date fields. Some fields do not have formatting options and this option is unavailable.

**Wrap after xx characters** – Specify the number of characters on which to “Word Wrap”. WBS Schedule Pro attempts to wrap the line of text at the number of characters specified. However, it can only wrap on a space and may wrap at more or less than the number of characters specified.

**Font** – Sets the font type for the selected cell.

**Size** – Sets the font size for the selected cell.

Rotate – Displays the text in the cell normal (0°), top-to-bottom (90°), or bottom-to-top (270°).

Align – Sets the alignment of the text Horizontally to the Left, Center or Right within the cell.

Vertical – Sets the alignment of the text Vertically to the Top, Center or Bottom within the cell.

Bold/Italic/Underline – Sets the text to Bold, Italic or Underlined for the selected cell.

Text – Sets the color for the text in the cell. Choose the Same as Box Border option to display the text the same color as the box border. This is useful, for example, if you were displaying Critical tasks in the chart as red boxes, and Noncritical tasks in the chart as Blue boxes, and you wanted the text within the boxes to match these colors.

Fill – Sets the background color for the cell.

Progress – Displays a fill pattern within the cell based on the completion (% Complete) of the task.

Margins – Allows you to set the left, right, top and bottom margins around the text in the selected cell.

### Additional Options

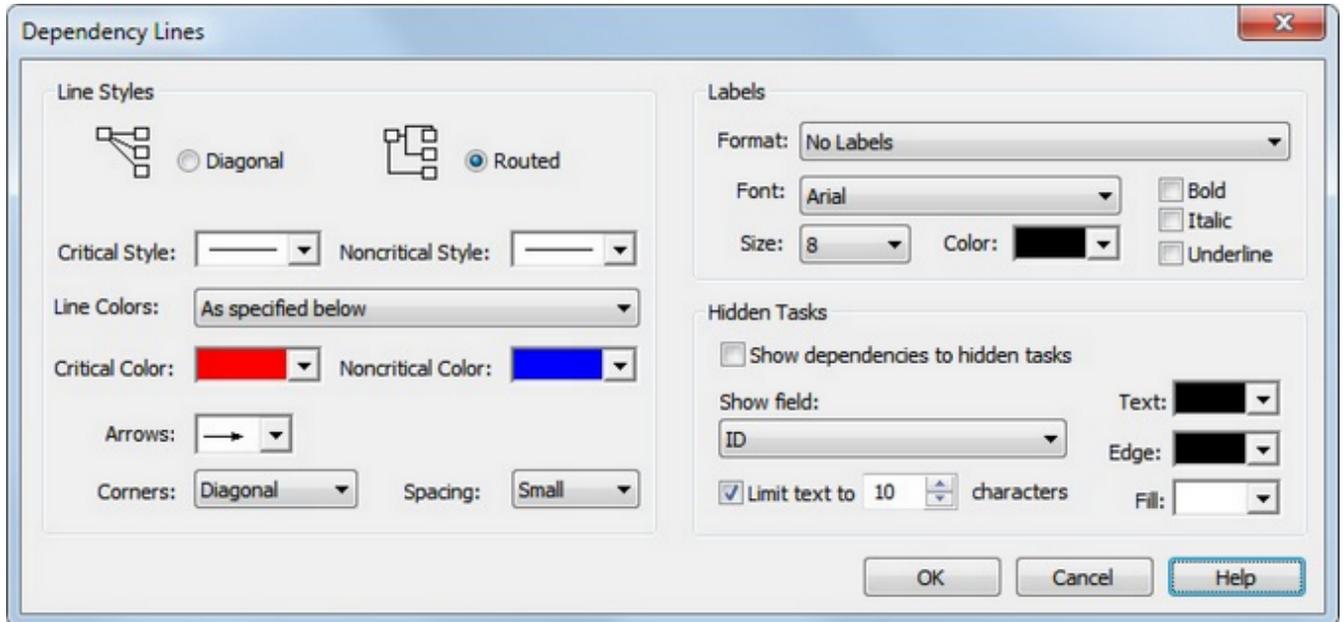
Gridlines – Select to configure the gridlines between the fields. The separating lines between the fields that are displayed are referred to as Gridlines. You can choose to turn them all off (Clear All), turn them all on (Set All), or individually select which gridlines appear.

Copy – Select to copy the arrangement of fields for pasting into the Summary Task Fields or Task Fields form. For example, if you are currently configuring Task Fields and you wanted to use this same arrangement of fields for your Summary Tasks, select Copy while in the Task Fields form, then go to the Summary Task Fields dialog box and press Paste.

Paste – Select to paste the copy of the fields into the current Summary Task Fields or Task Fields form. You must have previously selected Copy from either the Summary Task Fields or Task Fields dialog box for this to work.

## Link Lines

Define dependency line styles plus any text associated with dependency lines in the Network chart.



## Line Styles

Define how the dependency lines are displayed in the Network chart.

**Diagonal** – Draws dependency lines straight from the middle of one task box to another. Dependency lines may cut through other boxes or overlap other dependencies.

**Routed** – Draws dependency lines around task boxes in separate channels where necessary.

**Critical Style** – Define the line style and thickness of the critical dependency lines.

**Noncritical Style** – Define the line style and thickness of the noncritical dependency lines

**Line Colors:** - Choose to have the line colors based on the Critical Color and Noncritical color lists or choose to Match the line colors based on options in the dropdown list.

**Critical Color** – Define the line color of the critical dependency lines.

**Noncritical Color** – Define the line color of the noncritical dependency lines.

Arrows – Define the style and size of the arrowhead that is drawn at the end of each dependency line.

Corners – Define the shape of the corners when using the Routed Line Style. Note that some printers do not print the “Curve” corner style properly. We recommend using the Diagonal or Right Angle corner style for best results.

Spacing – Define the amount of space between dependency lines in the chart.

## Labels

Select to display information about the dependency directly on the dependency line.

Format: - Choose the format and type of dependency you wish to display on the dependency line.

Font/Size/Color, etc. – Define the text attributes for the dependency line labels. These attributes also apply to the text at the end of Hidden Dependency Lines if you choose that option.

## Hidden Tasks

Select this option to show dependency identifiers to tasks that are currently not displayed (hidden) in the chart.

Show dependencies to hidden tasks – Select this option to turn on this feature and to show the dependency plus a node at the end of the dependency line to identify the hidden task.

Show Field – Select the information to include in the node at the end of the dependency line such as the Id or the Name of the task.

Limit text to xx characters – Enter a maximum number of characters to include in the node for hidden tasks. Text will be truncated after the number of characters specified.

Text – Select the color for the text in the node.

Edge – Select the border color of the node.

Fill – Select the color for the interior of the node.

## Boxes

Specify Box Styles such as Shadow, Background Fill and Borders based on different conditions. Box styles can be based on the following:

1. By the Critical and Noncritical status of tasks.
2. Using the Flag Fields set on each task.
3. By the Progress (% Complete) of the tasks.
4. By the Level of the Summary Task, Task or Milestone in the chart.

Shadows, Fill and Borders can be based on the same condition or can be combined. An example of combining conditions could be Shadows based on whether a task is Critical or Noncritical and the Fill color based on the Progress of a task.

Tip: You can rename the entries in the Box Styles list by selecting Project-Fields. For example, Critical Task can be renamed to Critical Path Activity. The renamed entries are also used when the Legend for Box Styles is printed.

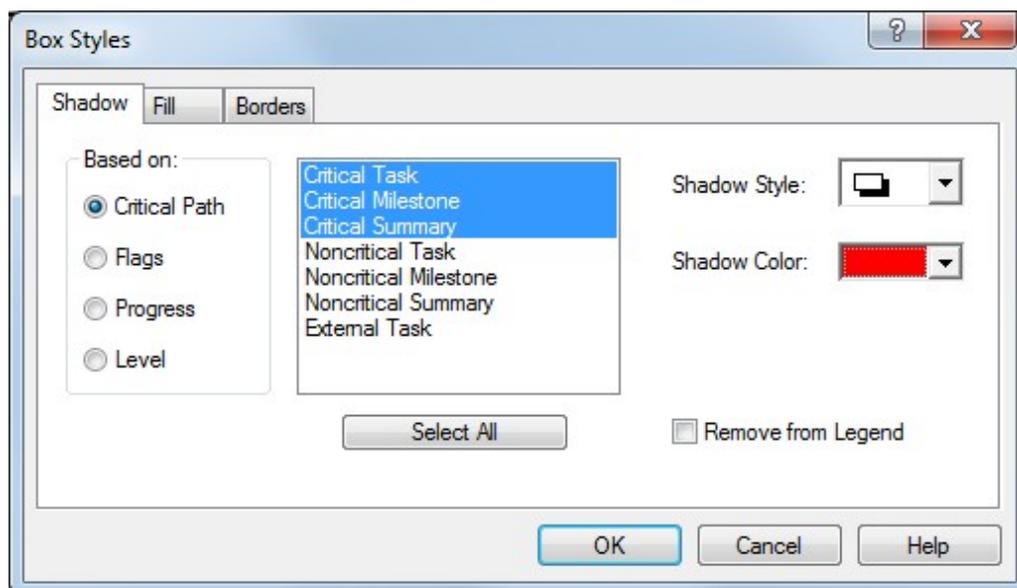
Tip #2: Tip: If you change settings in Box Styles and some boxes on the screen do not update to the new style you may have set Custom Box Settings on those boxes, see [Custom Box Settings](#). To Reset all of the boxes in the chart and use the chart-wide settings defined in Box Styles, press Ctrl-A in your chart, right-click on any task and select Reset. This will remove all Custom Box Settings in the chart.

The conditions on which to base the Shadows, Fill colors and Borders are described below.

---

### Based on Critical Path

Set the Shadow, Fill and/or Border attributes for Tasks, Summary Tasks and Milestones in the chart based on the Critical or Noncritical status of these items.



To select multiple items in the list, click and drag across these items or Ctrl-Click with your mouse to select multiple items.

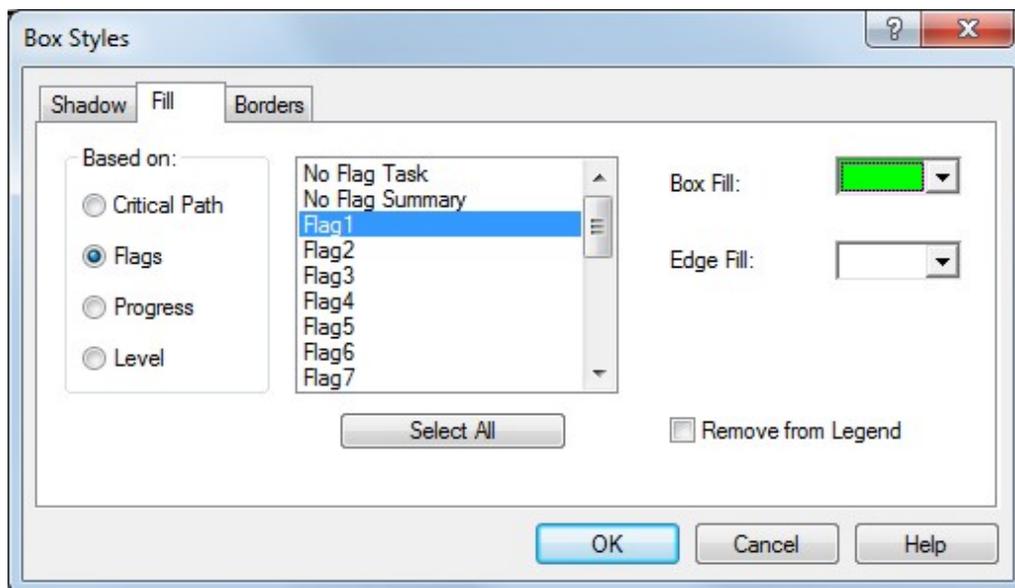
Click Remove from Legend to prevent the selected item from appearing the the legend when printed.

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### Based on Flags

Set the Shadow, Fill and/or Border attributes for items in the chart based on Flag settings. Flags in WBS Schedule Pro are simple Yes/No fields that you can set on a task. There are 20 Flag fields (Flag1 through Flag20). By using the Flag fields, styles can be defined for different flags and then set on specific tasks to apply that style to that task.

Note: The first Flag on a task takes precedence so if you have Flag2 and Flag3 set on a task it will display as Flag2.



For example, if you wanted some boxes in your chart to be Green, some Purple and others Yellow then you could define the Flag1 Fill to be Green, Flag2 Fill to Purple and Flag3 to Yellow. Then for each task that you want to be Green you would double-click that task, select the Flag tab in the Task Information dialog box and click Flag1. For each task that you want to be Purple you would select those tasks, set Flag2 and so on.

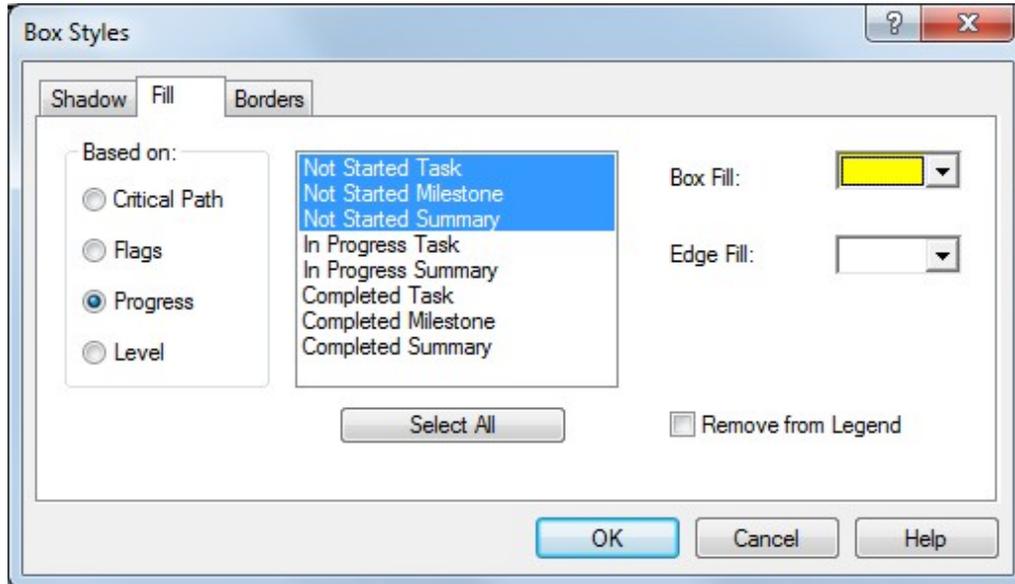
If you are using Microsoft Project, the Flag fields in WBS Schedule Pro correspond directly to the Flag fields in Microsoft Project. They can be set in Microsoft Project or in WBS Schedule Pro.

Click Remove from Legend to prevent the selected item from appearing the the legend when printed.

---

### Based on Progress

Set the Shadow, Fill and/or Border attributes for Tasks, Summary Tasks and Milestones in the chart based on the progress of these items.



You can define colors for Summary Tasks, Tasks and Milestones that have not started, are in progress or have completed. The % Complete (percent complete) field is used to determine the progress of a task using the following definition:

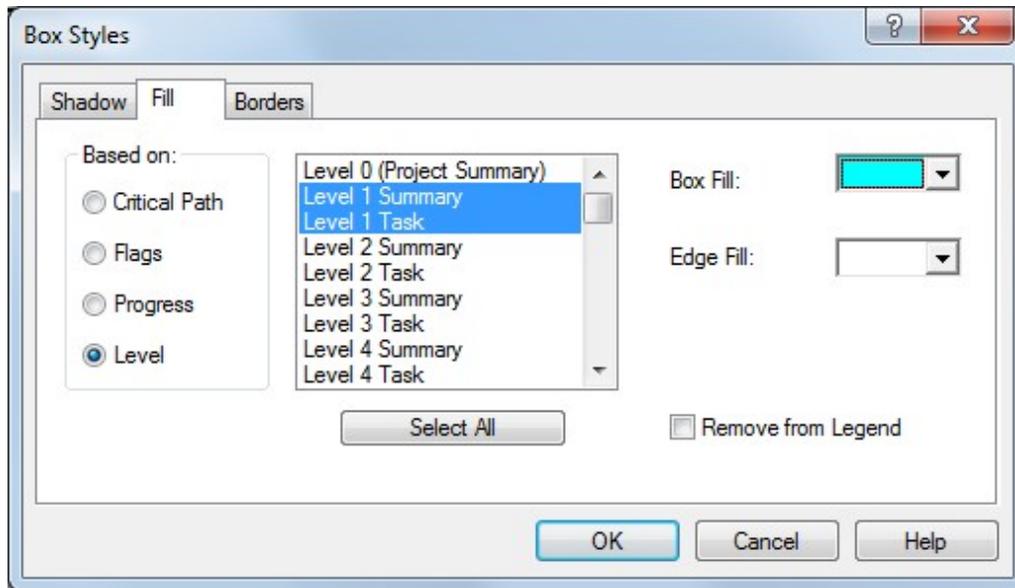
1. If a task has 0 (zero) in the % Complete field then the task is considered Not Started.
2. If a task has between 1 and 99 in the % Complete field then the task is considered In Progress.
3. If a task has 100 in the % Complete field then the task is considered to be Completed.

Click Remove from Legend to prevent the selected item from appearing the the legend when printed.

---

### Based on Level

Set the Shadow, Fill and/or Border attributes for Summary Tasks, Tasks (including Milestones) in the chart based on the current Level of these items in the chart.



You can define colors for Summary Tasks and Tasks based on their Level in the current chart.

Click Remove from Legend to prevent the selected item from appearing in the legend when printed.

---

### Shadow Settings

Style – Define the style of the shadow or choose None for no shadow.

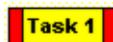
Color – Define the shadow color from the list of colors.

---

### Fill Settings

Box Fill – Define the color of the interior of the box.

Edge Fill – Define the color of the outside edge of the box. The Edge Fill color only applies if you have defined a Border Style that contains an area (edge) outside of the box. For example:




---

### Borders Settings

Style – Define the shape of the box by choosing from the various styles in this list.

Width – Define the thickness of the border by choosing Thin, Medium or Thick from the list.

Color – Define the color of the box border from the list of colors.

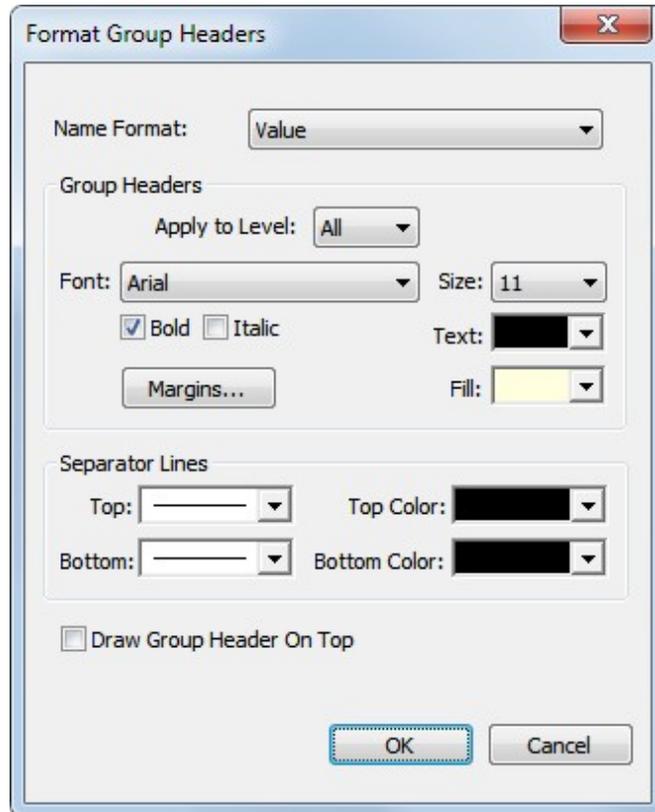
---

### Individually Changing Box Styles in a chart

If you want to change the box styles of select boxes in a chart, you do not need to use the Box Styles dialog box to do this. Instead, just select a box on the screen, right-click and select Custom Box Settings... The Custom Box Settings dialog box allows you to change the selected box(es) as exceptions to the Box Styles definition described above. The overriding style settings remain a part of that box until you delete the task or Reset it using the Custom Box Settings dialog box. See also [Custom Box Settings](#)

## Group Headers

Specify the formatting for the Group Headers in the Network Chart.



**Name Format** - This only applies if you are Grouped by a Text Field, Outline Code or WBS Code and the Grouping field contains a Value List. A Value List for a field can contain a Value plus a Description and the Name Format drop down list allows you to select to display only the Value, only the Description, the Value + Description or the Description + Value (in brackets) in the Group Header.

If you are Grouped by Summary Tasks then the Name of the Summary Tasks is displayed in the Group Header regardless of what is selected in the Name Format field.

**Group Headers** - Define font style, size, text color, background fill and margins for the Group Header text. You can choose to apply this to all Group Headers in the Network Chart or select a specific level.

**Separator Lines** - Define the style and color of the Group Header separator lines.

**Draw Group Header on Top** - Select to draw the Group Headers over the dependency lines in the Network Chart.



## Arrange

Choose a general arrangement of boxes. Network Charts will always place Task boxes from left to right based on their dependencies but you can choose to refine this by selecting the Arrangement option and selecting one of the following:

Top Down from Left - Automatically positions boxes in the chart starting from the upper left corner placing boxes to the right and down without regard to Critical Tasks.

Top Down from Left, Critical First - Automatically positions boxes in the chart starting from the upper left corner placing boxes to the right and down with the Critical Tasks positioned first.

Centered around Critical Path - Attempts to place boxes above and below a central row of Critical Tasks. Based on the complexities of the dependencies and the number of critical paths that may be displayed in your project this option may not always display the desired chart (ie: it's not perfect).

## Rows

Click to increase or decrease the spacing between rows in the chart.

## Columns

Click to increase or decrease the spacing between columns in the chart.

## Timescale

Select to turn On the Timescale or deselect to turn Off the Timescale in the Network Chart.

## Format Timescale

Displaying a Timescale in a Network Chart allows you to display tasks that Start or Finish within a certain time period.

Display time units such as Days, Weeks, Months, Quarters or Years (or every 3 days, every two weeks, etc...). You can specify different time units and whether you want to view tasks that Start in this time period or Finish in this time period.

To display a Timescale in the Network Chart:

1. Select the Format Tab and select the Timescale checkbox. This displays the Timescale with the last used settings.

or

2. Select the Format Tab and then Format Timescale. Modify the settings and click OK.

To turn off the Timescale in the Network Chart:

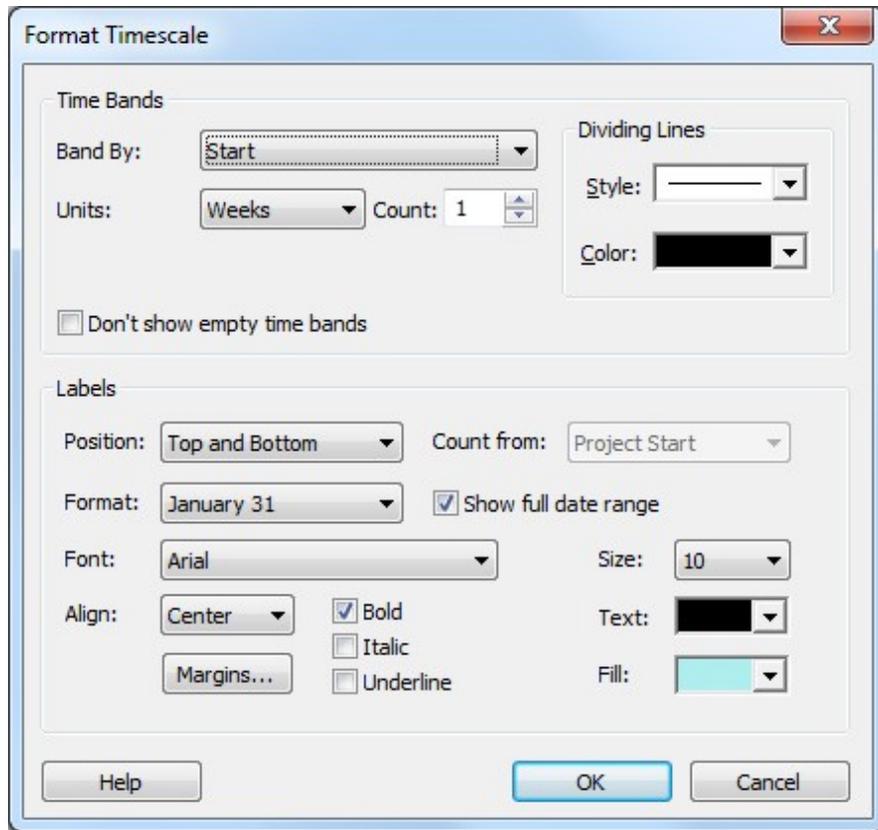
1. Select the Format Tab and deselect the Timescale checkbox.

or

2. Select the Format Tab and then Format Timescale. Click No Timescale.

or

3. Right-click on the Timescale and deselect the Show Timescale option.



## Time Bands

**Band By** – Select the field to use when placing a task in the time band. If you select Start, all tasks that Start during the time period are displayed in the time band. If you select Finish then all tasks that finish within that time period are displayed in the time band.

**Units** – Select to display the timescale by Hour, Day, Week, Month, Quarter, Half Year or Year time units.

**Count** – Select the time interval between units. Enter 1 to display every time period, 2 to display every other time period and so on. For example, if you were displaying Weeks as the Units, entering 2 in the Count would display a time band every two weeks.

**Don't Show Empty Time Bands** – Hides the time bands in the chart that do not contain tasks.

**Dividing Lines** – Defines the line style and color of the vertical dividing lines.

## Labels

**Position** – Select to display the timescale labels at the Top, Bottom or both Top and Bottom.

Count From – This option only applies when you choose to display dates as Day 1, Day 2... or Week 1, Week 2, etc... The Project Start option uses the Project Start Date to start counting up from this date, eg: Day 1, Day 2, etc. Project Finish uses the Project Finish Date to start counting down from this date eg: Day-5, Day -4, etc... Earliest Task uses the earliest task displayed on the screen to start counting. Latest Task uses the latest task displayed on the screen to start counting down from this date. Today uses today's date to start counting.

Format – Select the date format for the timescale.

Show Full Date Range – Displays the full range of dates when applicable. For example, if a two week period is selected, the full date range would display dates as Jan 1, 2016 – Jan 14, 2016 instead of Jan 1, 2014.

Font – Select the font size for the timescale labels.

Align – Select to align the labels within the time band either left, right or center.

Size – Select the font size of the timescale label.

Text – Select this to define the color of the timescale label text.

Fill – Select this to define the background color of the timescale labels.

Margins – Select to adjust the margins around the timescale label.

## Trace

Select to turn On the Trace feature or deselect to turn Off the Trace feature.

## Trace Options

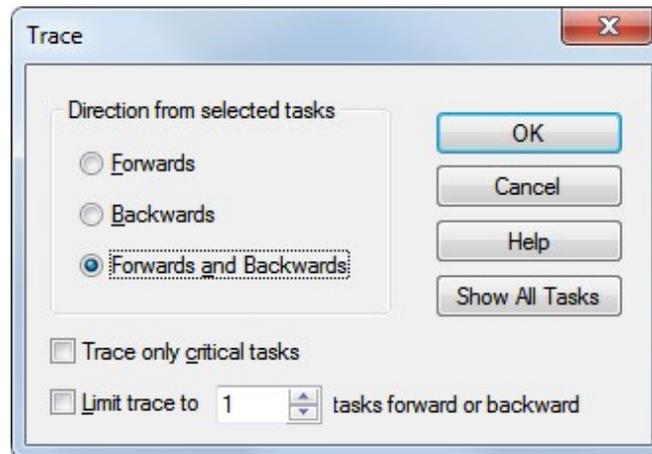
Select a Task or Tasks in the Network Chart and display only those tasks that lead up to and/or follow the selected task(s). You can also specify that only Critical Tasks are included in the trace and that the trace be limited to so many tasks forward or backwards from the selected task(s).

To perform a Trace in the Network Chart:

1. Select a task or multiple tasks (ctrl-click) in the Network Chart.
2. Select the Format Tab and select the Trace checkbox. This Traces the selected task(s) with the last used settings.

or

3. Select the Format Tab and then Trace Options. Modify the settings and click OK.



Direction from selected tasks – Select one of the three options to trace tasks Forward from the selected task, Backwards from the selected task or both Forwards and Backwards from the selected task.

Trace only critical tasks – Select to display only the Critical tasks when the Trace is applied. Deselect this option to include Critical and Noncritical tasks when the Trace is applied.

Limit trace to x tasks forward or backward – Select to display only x number of tasks forward or backward from the selected task when the trace is

applied. If you do not select this option then all tasks forward or all tasks backwards are included in the trace.

For example, if you wanted to see only the immediate predecessors and successors to a selected task, select this option and enter a 1 in the number field. Deselect this option to trace all the way forward or back.

Show All Tasks – Select this button to remove the Trace and display all tasks in the chart.

## Locked

Select this to "Lock" all boxes in the Network Chart in their current positions. When Locked, boxes are no longer automatically positioned based on their dependencies as you add new tasks.

Although selectable, in most cases the Locked icon is automatically selected if you manually move boxes around in the chart. By default, boxes in the Network Chart are automatically positioned as you add tasks or when you create a chart from Microsoft Project or other software. However, if you click and drag to move a box then the chart becomes Locked and boxes are no longer automatically positioned.

With boxes locked you can move boxes anywhere in the chart or add tasks exactly where you want them and they will stay where you place them. The exception to this is if you try to place a new box or move a box in between a row or column of tasks. In this case, it may create a row or column to accommodate the new task.

To unlock boxes and have them automatically positioned in the chart, deselect the Locked checkbox.

Caution: If you display/modify a Timescale or display/modify Groups in the Network Chart this Unlocks the chart and automatically places boxes in their original positions based on the dependencies defined in the project.

You can also Unlock selected tasks choosing the the Layout Selected option. This automatically positions only the selected tasks in the chart relative to each of their predecessors.

See also [Moving & Repositioning Tasks in a Network Chart](#)

## Auto Layout

Removes the Locked status of the Network Chart and allows all boxes in the chart to be automatically positioned relative to the dependencies in the project.

See [Locked](#)

See [Moving & Repositioning Tasks in a Network Chart](#)

## Layout Selected

Unlocks the selected task(s). This automatically positions only the selected task(s) in the chart relative to each of their predecessors.

See [Locked](#)

See [Moving & Repositioning Tasks in a Network Chart](#)

## Insert Row

Inserts a blank row above the selected task in the Network Chart.

## Insert Column

Inserts a blank column to the left of the selected task in the Network Chart.

## Match Height

Makes all boxes in the Network Chart equal in height to the tallest box in the chart.

## Match Width

Makes all boxes in the Network Chart equal in width to the widest box in the chart.

## Hyperlink Symbols

Turns the Hyperlink Symbols on and off.

Hyperlink Symbols allow you to quickly jump to the Hyperlink associated with a task by clicking the small symbol displayed next to the task. If Hyperlink Symbols are displayed in a WBS or Network chart, a Summary Task or Task that has a Hyperlink will display a small box next to that task. Click this box to go to that Hyperlink.

Hyperlink Symbols can be positioned in different places on the Summary Task and Task boxes. Right-click in a chart and select Format-Chart to change the location of the Hyperlink Symbols.

## Progress Marks

Turns the Progress Marks on and off in the Network Chart.

Progress Marks indicate the progress of tasks (and summary tasks) by placing an X or a single diagonal line through the task box based on the Percent Complete of the task. Progress Marks use the % Complete field to determine the progress of the tasks in the Network chart using the following rules:

1. Displays an X through the box if the task is 100% complete.
2. Displays a diagonal line through the box if the task is 1% to 99% Complete (in progress).
3. Does not display Progress Marks if the task is 0% complete.

Using Progress Marks is one of a number of different ways to display progress in a Network Chart. You can also show progress using the following features:

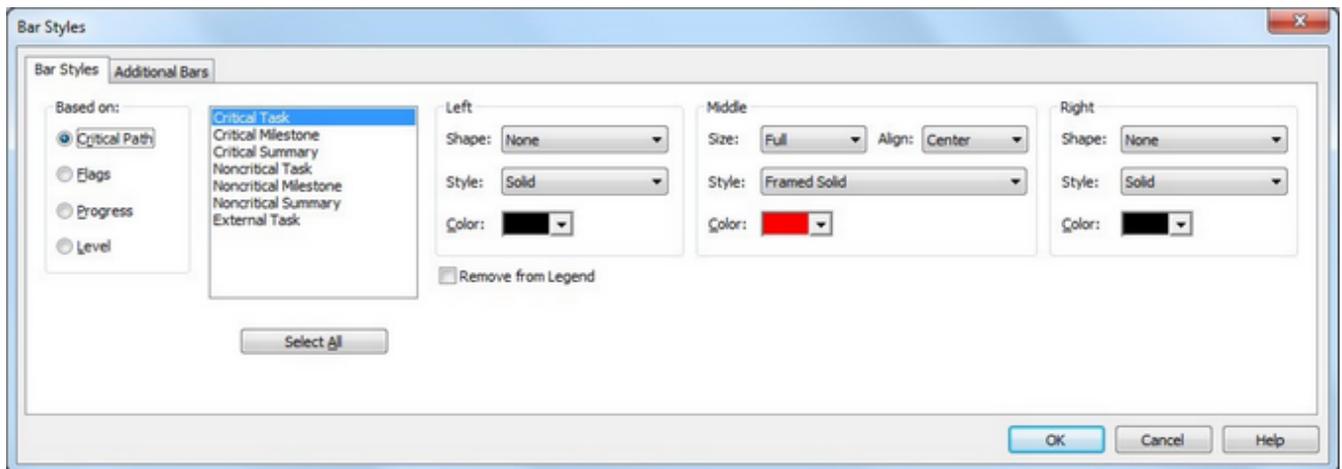
Use Colors and Box styles to display progress for your tasks in the Network Chart – See [Box Styles](#)

Color a field background for task boxes based on progress – See [Task Boxes](#)

## Format (Gantt Chart)

### Bar Styles

Modify the bar styles for Tasks, Summary Tasks and Milestones in the Gantt Chart.



Gantt Bars are always drawn from the Start date to the Finish date. In the case of Milestones, the Start and Finish dates are usually the same so you can use either the Left or Right options to create a style for Milestones. If you use the Microsoft Project's "Mark Task as Milestone" feature you can define a left, middle and right shape.

If you want to draw a Gantt Bar using a field other than the Start and Finish, use the Additional Bars feature.

### Defining Styles

Based on - Select to display the Gantt Bar styles based on Critical Path (whether Critical or Noncritical), Flags (using Flag1-Flag20), Progress (Not Started, In Progress or Complete) or by Level (WBS Level 1-20). Selecting one of these options determines what type of task is to be configured. Select each one in the list and configure the Left, Middle or Right portion of the Gantt Bar for this type of task.

Left - Define a style for the left edge of the Gantt bar or for Milestones.

Middle - Define a style for the middle part of the Gantt bar.

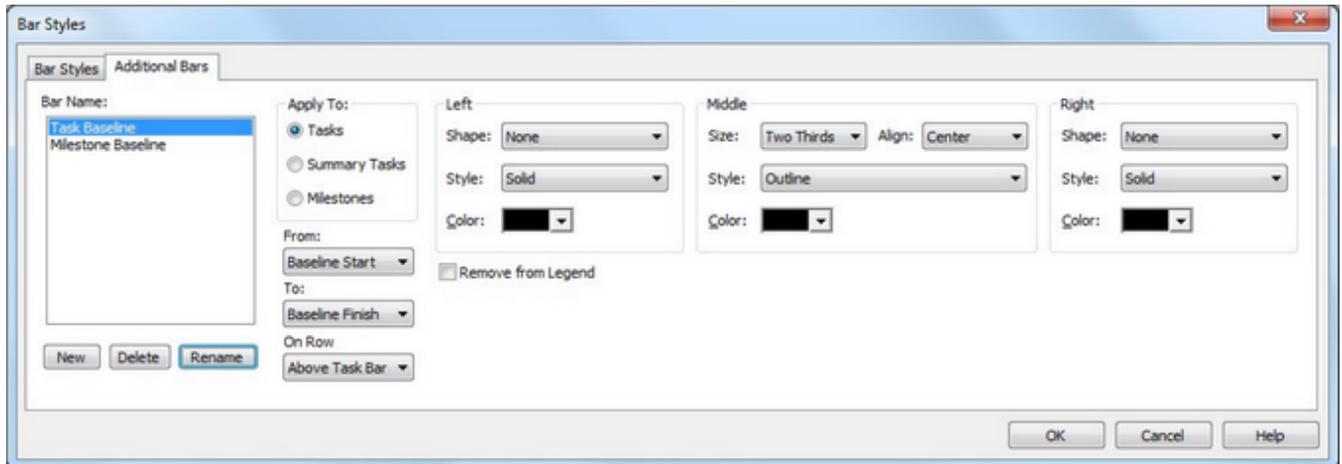
Right - Define a style for the right edge of the Gantt bar or for Milestones.

Remove from Legend - Select this to remove the currently selected style from

appearing in the Legend when printed.

## Additional Bars

Create additional Gantt Bars to display above, below or on the same row as the main Gantt Bar. This allow you to compare different sets of data to the Start and Finish dates that are displayed by the main Gantt Bar.



Any Bars defined here are drawn between the From and To fields.

In the case of Milestones, the Start and Finish dates are usually the same so you can use either the Left or Right options to create a style for Milestones. If you use the Microsoft Project's "Mark Task as Milestone" feature you can define a left, middle and right shape.

New - Click to create a new Bar style.

Delete - Click to remove the selected bar style from the chart.

Rename - Click to rename the selected bar style.

Apply to - Select the bar style to apply to either all the Tasks, Summary Tasks or Milestones in the chart.

From - Specify the field to use for the beginning of the bar.

To - Specify the field to use for the end of the bar.

On Row - Specify where to place the additional bar relative to the main bar defined in Bar Styles.

Left - Specify a Shape, Style and Color of the left edge of the bar. This option is useful for defining Milestones.

Middle - Select a Size, where to Align the bar within the row, Style and Color of the main portion of the bar.

Right - Specify a Shape, Style and Color of the right edge of the bar. This option is useful for defining Milestones.

Remove from Legend - Select this to prevent the selected bar style from appearing in the legend when printed.

## Bar Text

Display a field to the left, right, above, below or within a Summary Task bar, Task bar or Milestone symbol in the Gantt Chart. This displays the contents of that field in the Gantt Chart area of the chart.

Task Bar Fields

Click (Blank) to add text relative to the bar then select the Field drop-down list.

(Blank) (Blank) (Blank) (Blank) **Name** (Blank)

Style

Field: Name Label:   After

Format:   Wrap after 0 characters

Font: Arial Size: 10 Rotate: 0°

Align: Center  Bold  Italic  Underline Text:

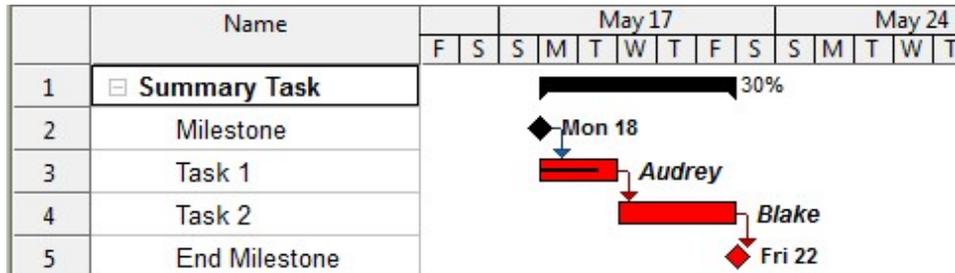
Vertical: Center

Bar Text can be displayed separately in a chart for Summary Tasks, Tasks and Milestones.

The Blue bar in the middle of the form represents a Summary Task, Task or Milestone in the chart. Select (Blank) where you wish to place the text and select the Field drop-down list to display a list of Fields available to place next to or within the bar. After selecting the Field you wish to display, select the various options for configuring the text.

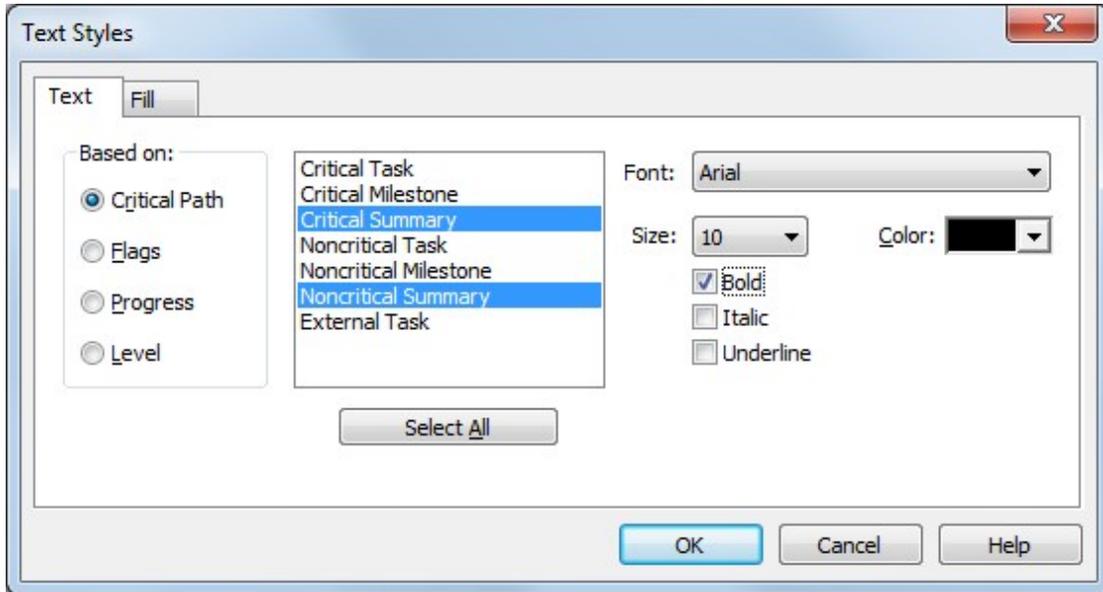
To remove a field displayed on a Gantt Bar, click the field in the middle area of the form and select (Blank) from the Field drop-down list (it's at the top).

The following example shows the % Complete field to the right of the Summary Tasks, the Finish date next to Milestones and Resource Names next to the Tasks in the chart.

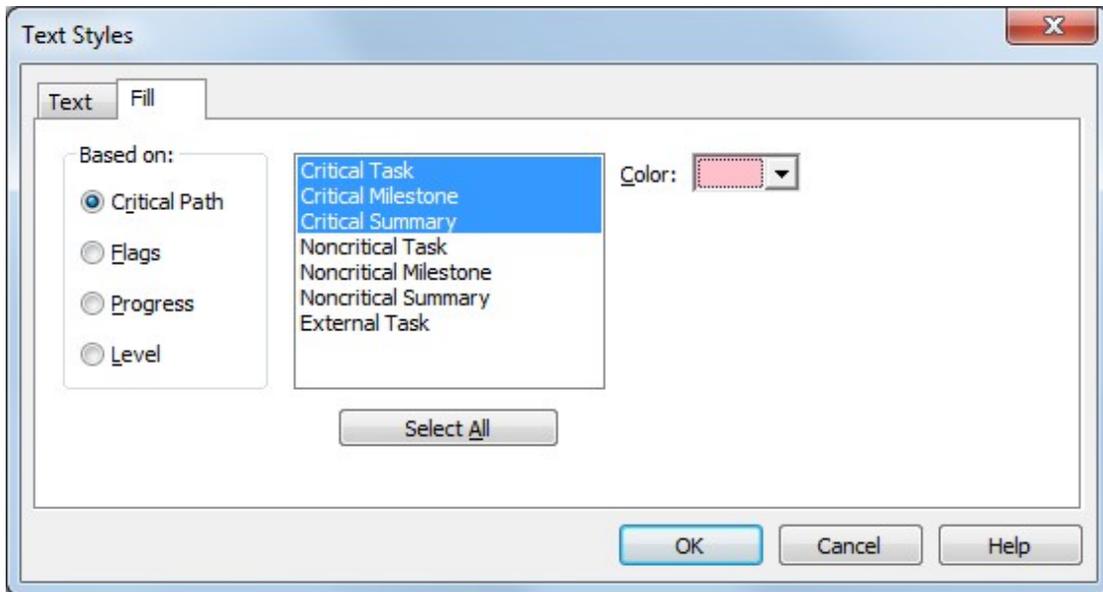


## Text

Change the Text style in the Task Sheet area of the Gantt Chart based on Critical Path, Flags, Progress or Level.



Change the Background (Fill) color of the cells in the Task Sheet based on Critical Path, Flags, Progress or Level.





## Fill

Copies the contents of the selected (active) cell into other highlighted cells below (Fill-Down) or above (Fill-Up).

You can also press Ctrl-D to Fill Down and Ctrl-U to Fill Up.

Here is an example of Fill-Down:

	Name	Department
1	<input type="checkbox"/> <b>Sumamry Task</b>	
2	Task 1	Dept A
3	Task 2	
4	Task 3	
5	Task 4	
6	Task 5	
7	Task 6	

	Name	Department
1	<input type="checkbox"/> <b>Sumamry Task</b>	
2	Task 1	Dept A
3	Task 2	Dept A
4	Task 3	Dept A
5	Task 4	Dept A
6	Task 5	
7	Task 6	

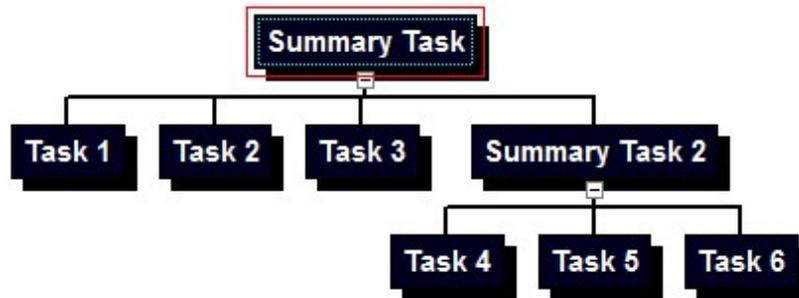
## Select

### All

Selects all Summary Tasks and Tasks in the current project. Once all items have been selected you can perform certain operations on these items depending on the current View.

You can also press Ctrl-A to Select All.

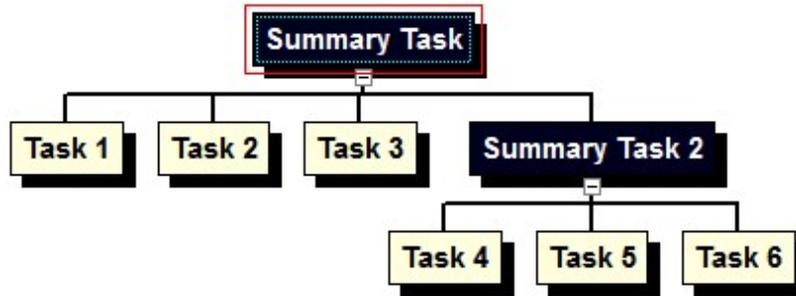
Here is an example of Select All in a WBS Chart:



## Summary Tasks

Selects all Summary Tasks in the current chart. Once all Summary Tasks have been selected you can perform certain operations on these depending on the View.

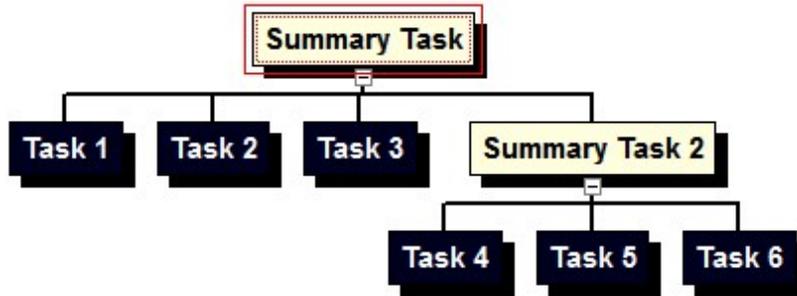
Here is an example of Select Summary Tasks in the WBS Chart:



## Tasks

Selects all Tasks in the current chart. Once all Tasks have been selected you can perform certain operations on these depending on the View.

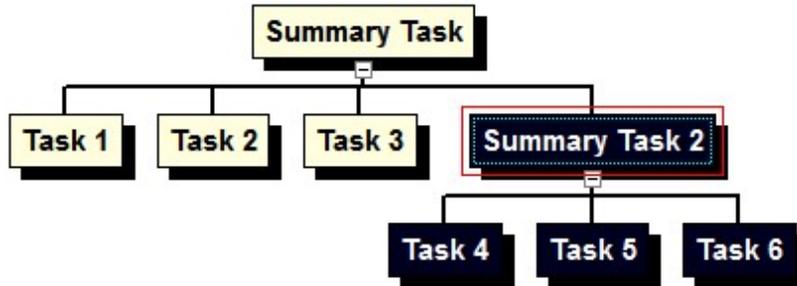
Here is an example of Select Tasks in the WBS Chart:



## Branch

Selects the current Summary Task and all subtasks. Once the branch has been selected you can perform certain operations on this depending on the View.

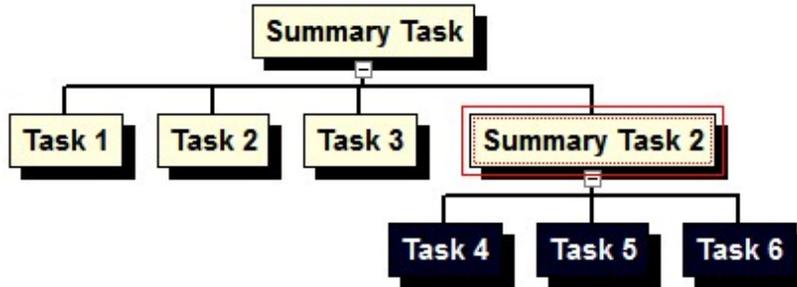
Here is an example of Select Branch in the WBS Chart:



## Subtasks

Selects all Subtasks to the selected Summary Task. Once all Subtasks have been selected you can perform certain operations on these depending on the View.

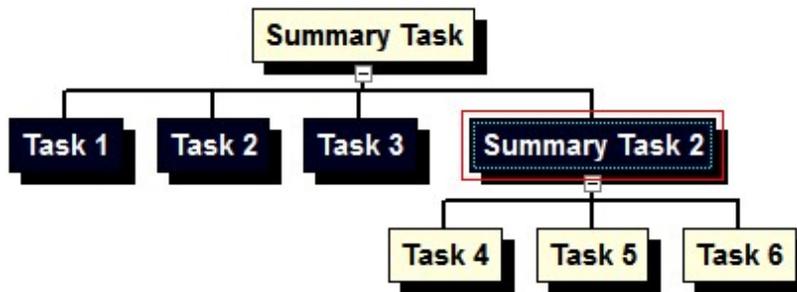
Here is an example of Select Subtasks in the WBS Chart:



## Level

Selects all Summary Tasks and Tasks at the current level of the selected box. Once all Summary Tasks and Tasks at the current level have been selected you can perform certain operations on these depending on the View.

Here is an example of Select Level in the WBS Chart:



## Clear

Clears the contents of the selected (highlighted) cells.

## Insert

Task Before

Inserts a new Task above the current task in the Task Sheet.

## Task After

Inserts a new Task below the current task in the Task Sheet.

You can also press the Insert Key to insert a new task below the current task.

## Summary Task

Inserts a Summary Task above the current task in the Task Sheet and makes the current task a subtask to the new Summary Task.

## Summary Task

Inserts a subtask to the current task in the Task Sheet.

## Delete

Deletes the selected Row or Rows in the Task Sheet. This will delete blank rows and rows that contain task data. If the Row contains Task data this information will be deleted.

## Indent

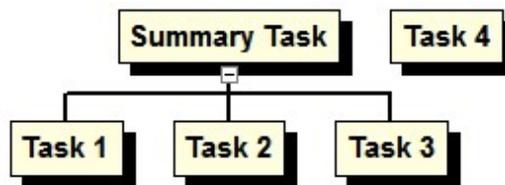
In the Task Sheet area of the Gantt Chart, Indenting makes the current Task (or Tasks) a Subtask (or Subtasks) to the one above it.

You can achieve the same results in a WBS Chart by adding Tasks below another. For example, in a Task Sheet you can indent several tasks under another to make the top-most task a Summary Task. Clicking Indent with Task 1, Task 2 and Task 3 selected produces the Task Sheet on the right:

	Name	Duration	Start	Finish
1	Summary Task	1d	1/1/2014	1/1/2014
2	Task 1	1d	1/1/2014	1/1/2014
3	Task 2	1d	1/1/2014	1/1/2014
4	Task 3	1d	1/1/2014	1/1/2014
5	Task 4	1d	1/1/2014	1/1/2014

	Name	Duration	Start	Finish
1	<input type="checkbox"/> Summary Task	1d	1/1/2014	1/1/2014
2	Task 1	1d	1/1/2014	1/1/2014
3	Task 2	1d	1/1/2014	1/1/2014
4	Task 3	1d	1/1/2014	1/1/2014
5	Task 4	1d	1/1/2014	1/1/2014

The corresponding WBS Chart would look like this:



## Outdent

In the Task Sheet area of the Gantt Chart, Outdenting moves the current Task or Summary Task up one outline level.

You can achieve the same results in a WBS Chart by rearranging tasks and moving them up a level. For example, highlighting Task 1, Task 2 and Task 3 in the Task Sheet on the left and clicking Outdent produces the Task Sheet on the right:

	Name	Duration	Start	Finish
1	<input type="checkbox"/> <b>Summary Task</b>	1d	1/1/2014	1/1/2014
2	Task 1	1d	1/1/2014	1/1/2014
3	Task 2	1d	1/1/2014	1/1/2014
4	Task 3	1d	1/1/2014	1/1/2014
5	Task 4	1d	1/1/2014	1/1/2014

	Name	Duration	Start	Finish
1	Summary Task	1d	1/1/2014	1/1/2014
2	Task 1	1d	1/1/2014	1/1/2014
3	Task 2	1d	1/1/2014	1/1/2014
4	Task 3	1d	1/1/2014	1/1/2014
5	Task 4	1d	1/1/2014	1/1/2014

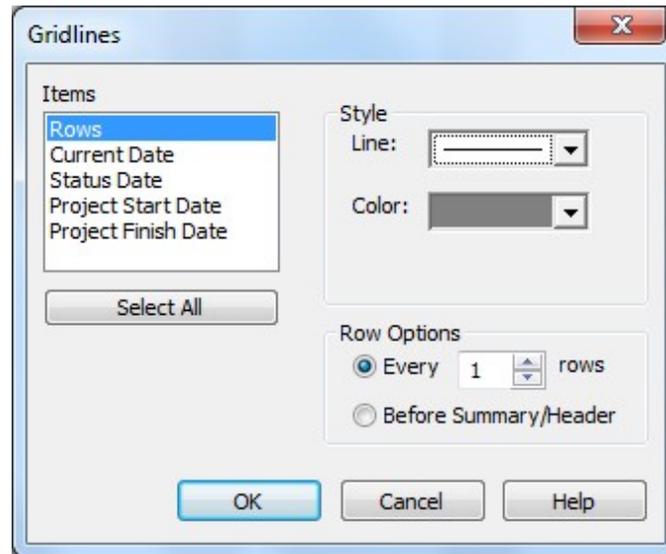
The corresponding WBS Chart would look like this:



In this case you have removed any structure to the project.

## Gridlines

Define various Gridlines for the Gantt Chart. Choose a Gridline type to modify and select the Line Style, Color and interval for displaying the lines.



### Types of Gridlines

**Rows** - Displays a horizontal line after each row in the Gantt Bar area.

**Current Date** - Displays a vertical line in the Gantt Bar area on the Current Date.

**Status Date** - Displays a vertical line in the Gantt Bar area on the Status Date of the Project. The Status Date only applies when you are linked to a Microsoft Project plan and comes from the Microsoft Project plan.

**Project Start Date** - Displays a vertical line in the Gantt Bar area on the Project Start Date. The Project Start Date is set in File-Options-Settings.

**Project Finish Date** - Displays a vertical line in the Gantt Bar area on the Project Finish Date. The Project Start Date is set in File-Options-Settings.

To remove a Gridline, select it from the list and select None in the Line Style drop-down list.

Row Options only apply when setting a Row Gridline. Set it to appear at a chosen interval or before each Summary Task or Group Header in the Gantt Chart.



## Timescale

The Gantt Chart Timescale is displayed at the top of the Gantt Bar area and shows Tasks, Summary Tasks and Milestones proportionally sized to the current Timescale settings. Use the Timescale form to change these settings.

The Gantt Chart Timescale is divided into an Upper Tier and Lower Tier. You can turn off the Upper Tier but not the Lower Tier. The Bars in the Gantt Chart are always drawn proportionally to the timescale units of the Lower Tier.

### Upper Tier/Lower Tier

**Units** – Select to display the timescale by Hour, Day, Week, Month, Quarter, Half Year or Year time units.

**Align** - Select to align the timescale text left, center or right aligned in the available space.

**Tick Lines** - Select to turn the vertical separator lines between the time units on or off.

**Format** - Select a date format for the timescale units. The order of the Date and

Time formats comes from the system and can be changed using the Windows Control Panel.

Count – Select the time interval between units. Enter 1 to display every time period, 2 to display every other time period and so on. For example, if you were displaying Weeks as the Units, entering 2 in the Count would display a time band every two weeks.

Show Full Date Range – Displays the full range of dates when applicable. For example, if a two week period is selected, the full date range would display dates as Jan 1, 2016 – Jan 14, 2016 instead of Jan 1, 2016.

Count From – This option only applies when you choose to display dates as Day 1, Day 2... or Week 1, Week 2, etc... The Project Start option uses the Project Start Date to start counting up from this date, eg: Day 1, Day 2, etc. Project Finish uses the Project Finish Date to start counting down from this date eg: Day-5, Day -4, etc... Earliest Task uses the earliest task displayed on the screen to start counting. Latest Task uses the latest task displayed on the screen to start counting down from this date. Today uses today's date to start counting.

Show Upper Tier - Select to show the upper tier along with the lower tier. Deselect to show only the lower tier of the timescale.

Separator between Tiers - select to show the horizontal separator line between the upper and lower tier. Deselect to remove this line.

### Non-Working Time

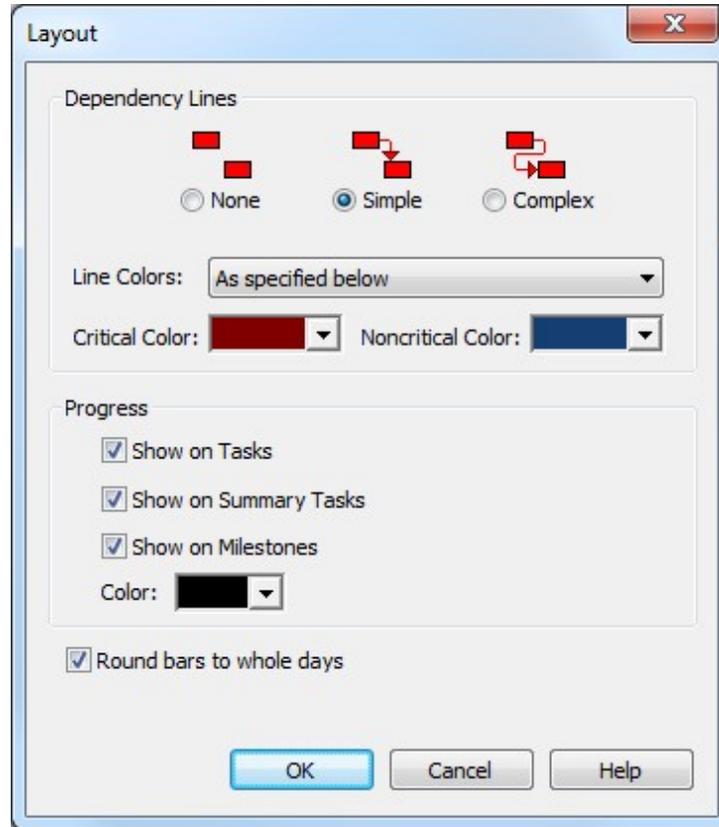
Show Non-Working Time – Select to display vertically coloring representing the times when no work occurs (eg: weekends and non-working days).

Color - Select the color the the Non-Working Time shading.

Timescale Tip: The day of the week the timescale uses to start the week is based on Windows system settings. Change this in the Windows Control Panel in the Region and Language section.

## Layout

Specify Gantt Chart layout options.



### Dependency Lines

None - Displays Gantt Bars in the chart without drawing the dependency lines.

Simple - Displays a more direct routing of dependency lines between Gantt Bars in the chart.

Complex - Displays a more complex routing of dependency lines between the Gantt Bars in the chart.

Line Colors - Select to color the dependency lines using Critical vs. Noncritical criteria or by matching the color of the Predecessor or Successor task.

Critical Color - Select the color for the Critical dependency lines in the project.

Noncritical Color - Select the color for the Noncritical dependency lines in the project.

### Progress

Show on Tasks - Select to show progress (% Complete) on a Task as a thin bar through the middle of the Task. You must also choose the Progress Marks checkbox on the Format tab for this to appear.

Show on Summary Tasks - Select to show progress (% Complete) on a Summary Task as a thin bar through the middle of the Summary Task. You must also choose the Progress Marks checkbox on the Format tab for this to appear.

Show on Milestones - Select to show progress (% Complete) on a Milestone by filling in the Milestone symbol. You must also choose the Progress Marks checkbox on the Format tab for this to appear.

Color - Select the color of the Progress bar or fill.

Round bars to whole days - Select this to draw the Gantt Bars through the entire day when days are displayed in the Timescale.

## Delete (Rows)

Deletes the selected Row or Rows in the Task Sheet. This will delete blank rows and rows that contain task data. If the Row contains Task data this information will be deleted.

When linked to a Microsoft Project plan, you cannot Delete a Blank row. Go to Microsoft Project to Delete a blank row.

## Insert Blank

Inserts a blank row into the Task Sheet. A blank row does not contain task information, it is simply a visual way to separate rows in the Task Sheet.

When linked to a Microsoft Project plan, you cannot Insert a Blank row and this option is grayed out in WBS Schedule Pro. Go to Microsoft Project to Insert a blank row.

## Insert (Columns)

Inserts a Column to the left of the currently selected Column in the Task Sheet.

## Hide

Removes the currently selected Column or Columns from the Task Sheet. This does not delete any of the data within the selected column(s).

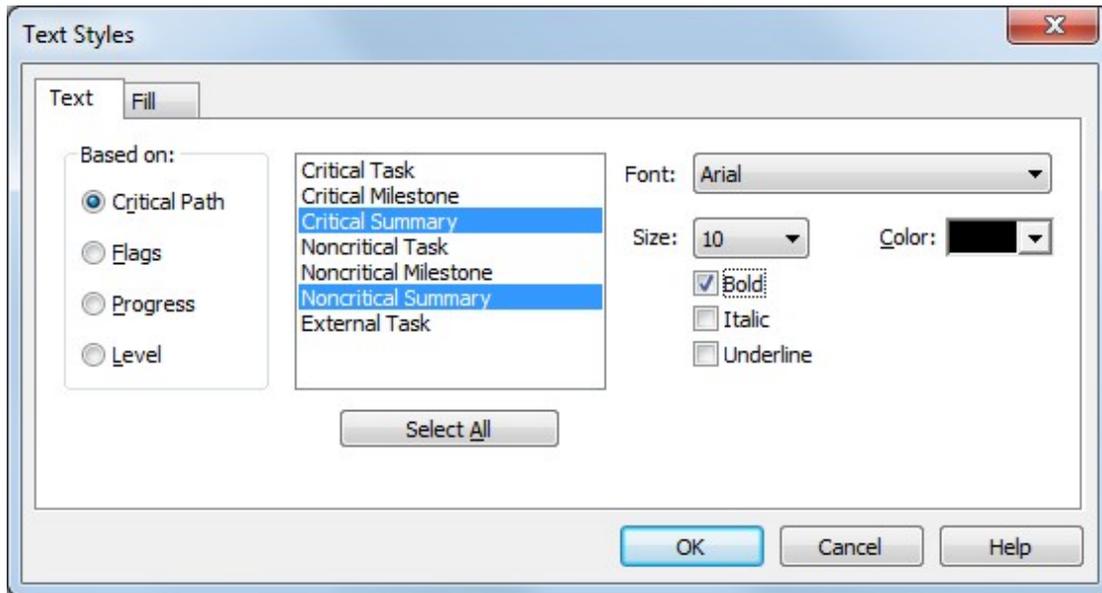
Choose Insert Column to add a column back into the Task Sheet.

Progress Marks

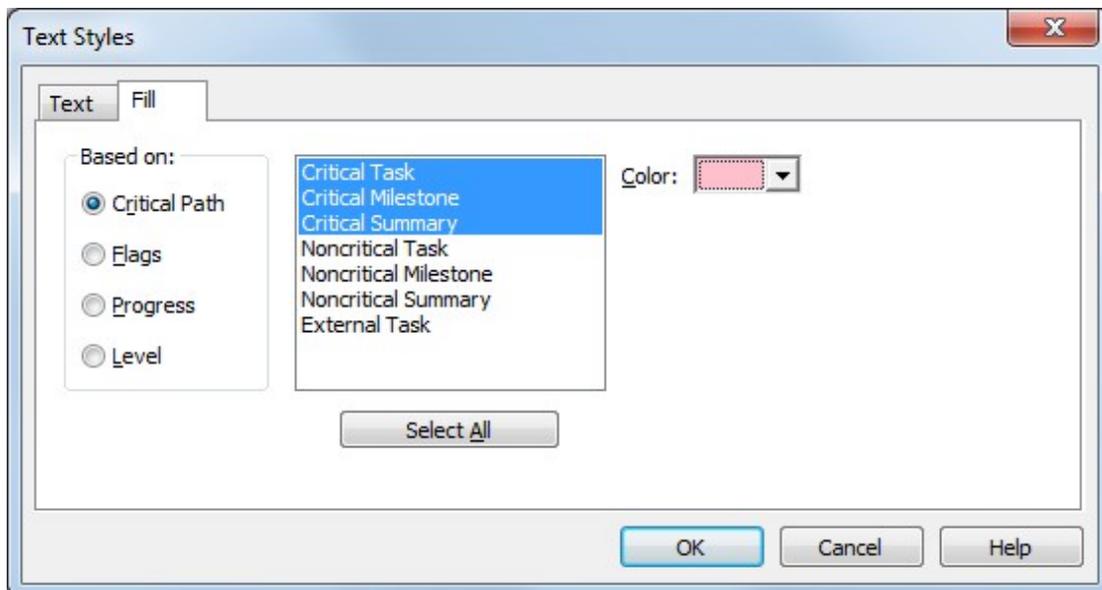
## Format (Task Sheet)

### Text

Change the Text style in the Task Sheet based on Critical Path, Flags, Progress or Level.



Change the Background (Fill) color of the cells in the Task Sheet based on Critical Path, Flags, Progress or Level.





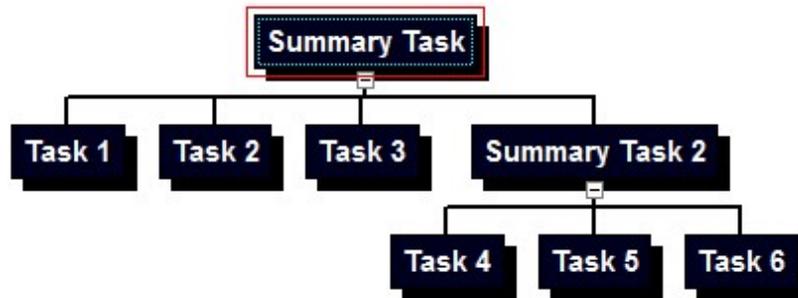
## Select

### All

Selects all Summary Tasks and Tasks in the current project. Once all items have been selected you can perform certain operations on these items depending on the current View.

You can also press Ctrl-A to Select All.

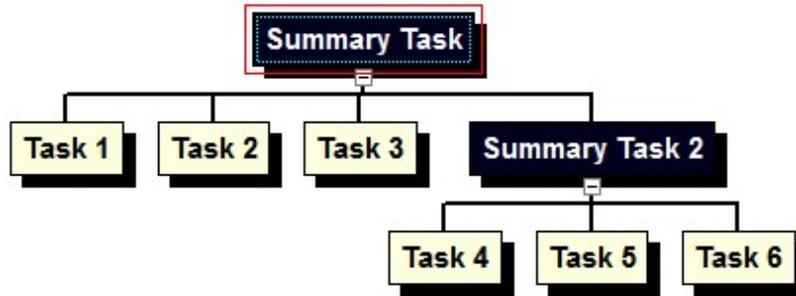
Here is an example of Select All in a WBS Chart:



## Summary Tasks

Selects all Summary Tasks in the current chart. Once all Summary Tasks have been selected you can perform certain operations on these depending on the View.

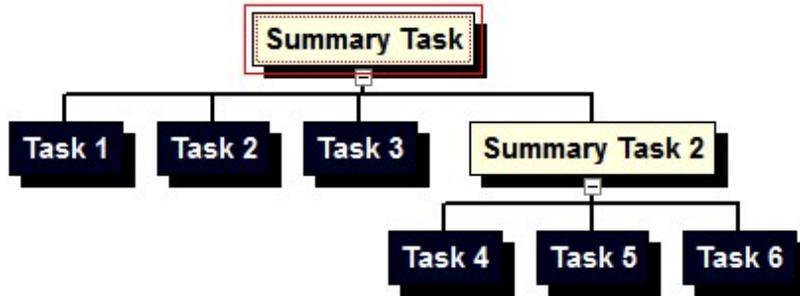
Here is an example of Select Summary Tasks in the WBS Chart:



## Tasks

Selects all Tasks in the current chart. Once all Tasks have been selected you can perform certain operations on these depending on the View.

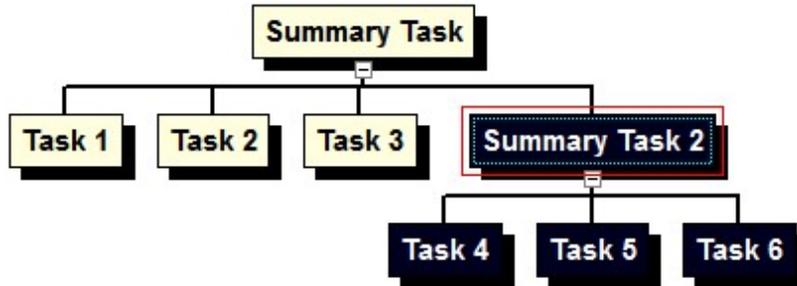
Here is an example of Select Tasks in the WBS Chart:



## Branch

Selects the current Summary Task and all subtasks. Once the branch has been selected you can perform certain operations on this depending on the View.

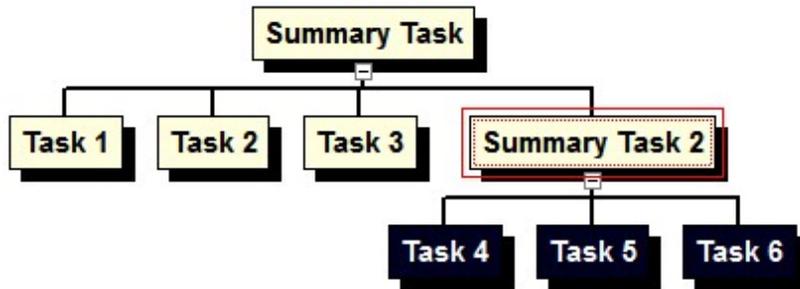
Here is an example of Select Branch in the WBS Chart:



## Subtasks

Selects all Subtasks to the selected Summary Task. Once all Subtasks have been selected you can perform certain operations on these depending on the View.

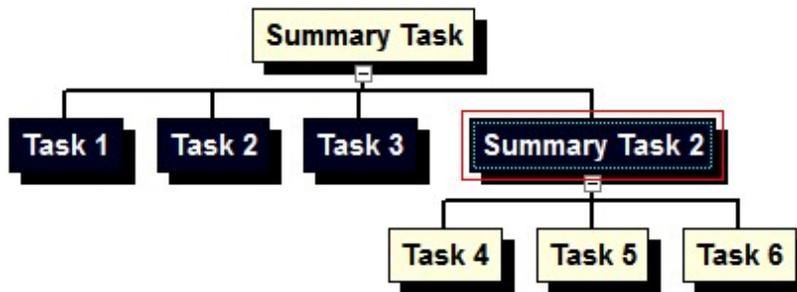
Here is an example of Select Subtasks in the WBS Chart:



## Level

Selects all Summary Tasks and Tasks at the current level of the selected box. Once all Summary Tasks and Tasks at the current level have been selected you can perform certain operations on these depending on the View.

Here is an example of Select Level in the WBS Chart:



## Fill

Copies the contents of the selected (active) cell into other highlighted cells below (Fill-Down) or above (Fill-Up).

You can also press Ctrl-D to Fill Down and Ctrl-U to Fill Up.

Here is an example of Fill-Down:

	Name	Department
1	<input type="checkbox"/> <b>Sumamry Task</b>	
2	Task 1	Dept A
3	Task 2	
4	Task 3	
5	Task 4	
6	Task 5	
7	Task 6	

	Name	Department
1	<input type="checkbox"/> <b>Sumamry Task</b>	
2	Task 1	Dept A
3	Task 2	Dept A
4	Task 3	Dept A
5	Task 4	Dept A
6	Task 5	
7	Task 6	

## Clear

Clears the contents of the selected (highlighted) cells.

## Insert

Task Before

Inserts a new Task above the current task in the Task Sheet.

## Task After

Inserts a new Task below the current task in the Task Sheet.

You can also press the Insert Key to insert a new task below the current task.

## Summary Task

Inserts a Summary Task above the current task in the Task Sheet and makes the current task a subtask to the new Summary Task.

## Subtask

Inserts a subtask to the current task in the Task Sheet.

## Delete

Deletes the selected Row or Rows in the Task Sheet. This will delete blank rows and rows that contain task data. If the Row contains Task data this information will be deleted.

## Indent

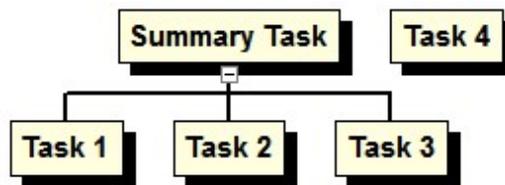
In the Task Sheet, makes the current Task (or Tasks) a Subtask (or Subtasks) to the one above it.

The Indent button is only available in the Task Sheet. You can achieve the same results in a WBS Chart by adding Tasks below another. For example, in a Task Sheet you can indent several tasks under another to make the top-most task a Summary Task. Clicking Indent with Task 1, Task 2 and Task 3 selected produces the Task Sheet on the right:

	Name	Duration	Start	Finish
1	Summary Task	1d	1/1/2014	1/1/2014
2	Task 1	1d	1/1/2014	1/1/2014
3	Task 2	1d	1/1/2014	1/1/2014
4	Task 3	1d	1/1/2014	1/1/2014
5	Task 4	1d	1/1/2014	1/1/2014

	Name	Duration	Start	Finish
1	<input type="checkbox"/> Summary Task	1d	1/1/2014	1/1/2014
2	Task 1	1d	1/1/2014	1/1/2014
3	Task 2	1d	1/1/2014	1/1/2014
4	Task 3	1d	1/1/2014	1/1/2014
5	Task 4	1d	1/1/2014	1/1/2014

The corresponding WBS Chart would look like this:



## Outdent

In the Task Sheet, moves the current Task or Summary Task up one outline level.

The Outdent button is only available in the Task Sheet. You can achieve the same results in a WBS Chart by rearranging tasks and moving them up a level. For example, highlighting Task 1, Task 2 and Task 3 in the Task Sheet on the left and clicking Outdent produces the Task Sheet on the right:

	Name	Duration	Start	Finish
1	<input type="checkbox"/> <b>Summary Task</b>	1d	1/1/2014	1/1/2014
2	Task 1	1d	1/1/2014	1/1/2014
3	Task 2	1d	1/1/2014	1/1/2014
4	Task 3	1d	1/1/2014	1/1/2014
5	Task 4	1d	1/1/2014	1/1/2014

	Name	Duration	Start	Finish
1	Summary Task	1d	1/1/2014	1/1/2014
2	Task 1	1d	1/1/2014	1/1/2014
3	Task 2	1d	1/1/2014	1/1/2014
4	Task 3	1d	1/1/2014	1/1/2014
5	Task 4	1d	1/1/2014	1/1/2014

The corresponding WBS Chart would look like this:



In this case you have removed any structure to the project.

## Insert Blank

Inserts a blank row into the Task Sheet. A blank row does not contain task information, it is simply a visual way to separate rows in the Task Sheet.

When linked to a Microsoft Project plan, you cannot Insert a Blank row and this option is grayed out in WBS Schedule Pro. Go to Microsoft Project to Insert a blank row.

## Delete (Rows)

Deletes the selected Row or Rows in the Task Sheet. This will delete blank rows and rows that contain task data. If the Row contains Task data this information will be deleted.

When linked to a Microsoft Project plan, you cannot Delete a Blank row. Go to Microsoft Project to Delete a blank row.

## Insert (Columns)

Inserts a Column to the left of the currently selected Column in the Task Sheet.

## Hide

Removes the currently selected Column or Columns from the Task Sheet. This does not delete any of the data within the selected column(s).

Choose Insert Column to add a column back into the Task Sheet.

## Frequently Asked Questions

How do I to Print to a PDF file?

PDF Files created in WBS Schedule Pro – What are they and how can I create them?

A PDF file created from WBS Schedule Pro can be opened by anyone with a PDF "reader" without having the WBS Schedule Pro software installed. Think of a PDF file as a chart that was printed to a file rather than to paper.

Most computers have a PDF reader installed such as Adobe PDF Reader. You must have this PDF Reader to open PDF files. If you do not have a PDF Reader you can download a free one by searching the Adobe website at [www.adobe.com](http://www.adobe.com).

You can create a PDF file from WBS Schedule Pro using a PDF "writer". A PDF writer is not included as part of WBS Schedule Pro nor is it included with Microsoft Windows like other printer drivers (as of this writing). You can purchase a PDF writer from Adobe ([www.adobe.com](http://www.adobe.com)) or download a free PDF writer from the Internet. We have used a free PDF writer for years called CutePDF ([www.cutepdf.com](http://www.cutepdf.com)) but there are many more out there.

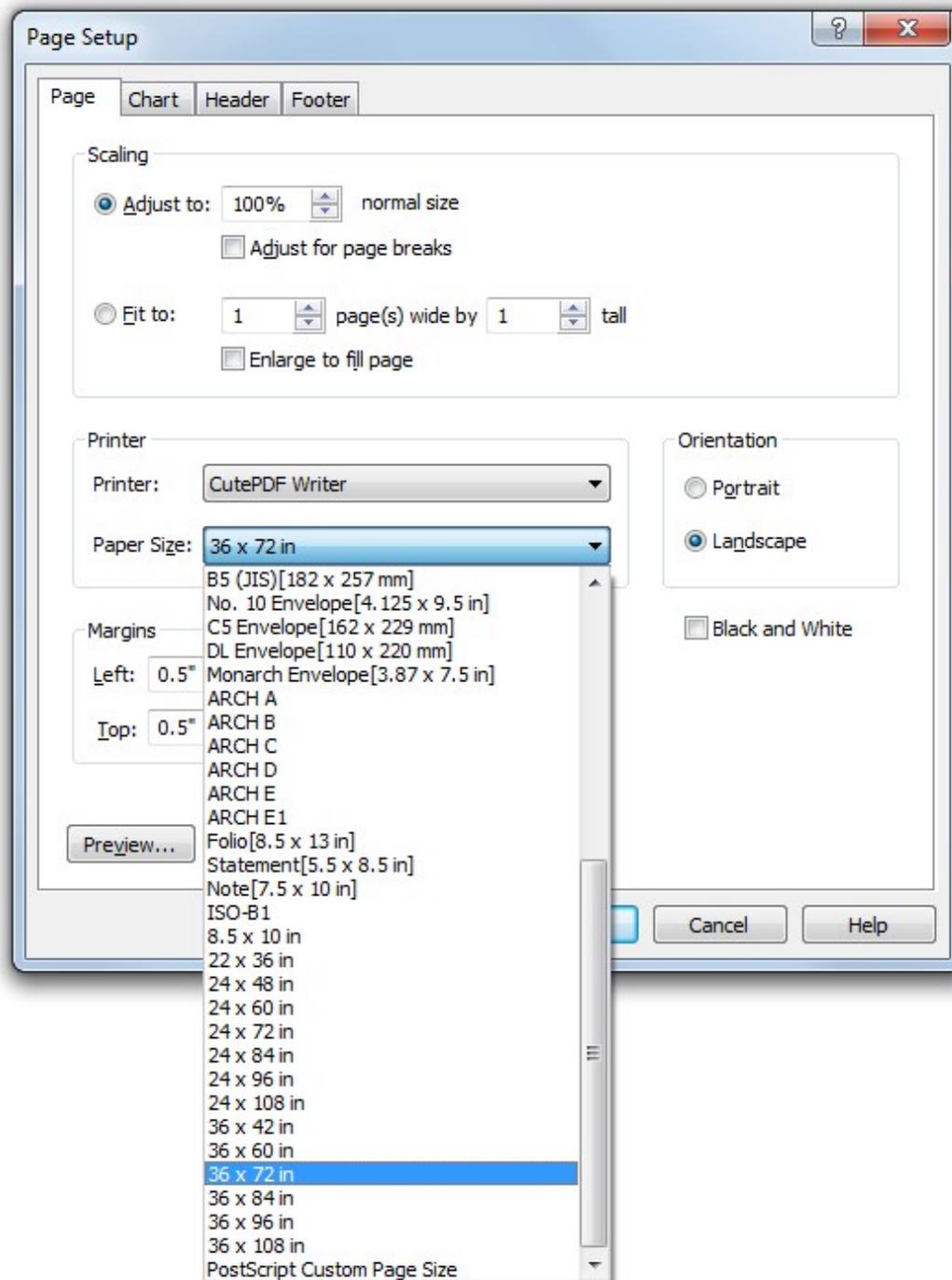
The steps to creating a PDF file are the same as printing a chart. Once a PDF writer is installed, you configure the chart, preview it (if you want) but instead of printing directly to a printer you print to a PDF file by selecting the PDF writer as your printer. This produces a file (with a .pdf extension) that can be opened using the PDF reader.

Large Paper Sizes in a PDF file - How to print to a large paper size so it can be printed at another location or at a copy/print shop

Not everyone has a large format printer or it may be that the large printer is not currently connected to your computer. You can print a PDF file to any size paper that can then be taken to a location where the printer is connected.

If you want to print the PDF to a certain size paper you must define this size before the PDF file is created. Once the PDF file is created it can only be printed to that same size paper.

To define a paper size in WBS Schedule Pro, go to the File menu and select Page Setup. Select a PDF Writer from the Printer list and Paper Size to display the sizes supported by the PDF writer. If the list of paper sizes does not include the size you wish to print to then you may have to go to the Printer section of the Control Panel to define a "custom" paper size for the PDF writer driver. This custom size will then appear in the list of Paper Sizes.



Once the paper size is defined we always recommend using Print Preview to verify that the chart prints correctly on this paper. Once the PDF file is created you can take this to a computer that is connected directly to a large paper printer, open it and print it.

What's the best way to Print Large Pages to a File?

See [Printing to a PDF File](#)

## Why are Dates are Missing in the Chart?

When using WBS Schedule Pro with Microsoft Project 2010, 2013 or 2016, dates are missing or not calculated

This is due to Microsoft Project 2010/2013/2016 being in Manually Scheduled mode. By default, MS Project 2010, 2013 and 2016 operate in Manually Scheduled mode which means that changes made to a MS Project schedule do not create or update dates in the project. To display and calculate dates, turn Auto Scheduled on in MS Project.

To do this:

1. Open Project 2010, Project 2013 or Project 2016.
2. Go to File-Options-Schedule.
3. Select Scheduling options for this project: and choose All New Projects.
4. Select New tasks created and choose Auto Scheduled.
5. Scroll down and turn Calculation to On.

Is the Notes field supported?

See [Adding Notes to a Task](#)

## Why is the Notes Field Grayed out?

The Notes field is grayed out and not available for editing when the WBS Schedule Pro plan is linked to Microsoft Project.

Here is the complete explanation:

### The Notes field and Microsoft Project

The Notes field is a different type of field in Microsoft Project. Notes in Microsoft Project can contain formatting, embedded objects, bullets, etc. and requires special handling to support.

Notes entered in a standalone WBS Schedule Pro project and transferred to Microsoft Project are transferred exactly as you entered them in WBS Schedule Pro.

Notes entered in Microsoft Project and transferred to WBS Schedule Pro appear unformatted in WBS Schedule Pro. This is due to the fact that there is no way for WBS Schedule Pro or any other program to read or access "formatted" Notes from Project. Microsoft Project can only export plain text from the Notes field so this is how they are displayed in WBS Schedule Pro. For this reason, Notes in a project linked to a Microsoft Project plan become read-only in WBS Schedule Pro. You must return to Microsoft Project to edit the Notes in order to preserve any fancy formatting done in the Notes field.

Why are some fields grayed out?

## Rolled Up Fields

The Grayed out fields you see in Summary Tasks are the Rolled Up fields.

Fields that are rolled up are automatically calculated from the data in the subtasks below the Summary Tasks and cannot be edited. Certain fields in a Summary Tasks are always rolled up. Duration, % Complete, Work, Start, Finish, Constraint Type, Constraint Date and Resource Names are some of the fields that are always automatically rolled up from the lowest level Tasks up to each Summary Task in the project.

You can also customize certain fields to rollup their subtask information to each Summary Level. For more info on this, see [Fields](#)

A typical Summary Task may look like this if you doubleclick it:

The screenshot shows a dialog box titled "Summary Task Information (ID: 1)". It has five tabs: "General", "Custom", "Flags", "Hyperlink", and "Notes". The "General" tab is selected. The fields are as follows:

- Name: Summary Task
- Duration: 8d
- % Complete: 0%
- WBS: 1
- Work: 0h
- Cost: \$0.00
- Start: 01/01/2014 8:00 AM
- Finish: 01/10/2014 5:00 PM
- Constraint Type: As Soon As Possible
- Constraint Date: (empty)
- Resource Names: (empty)

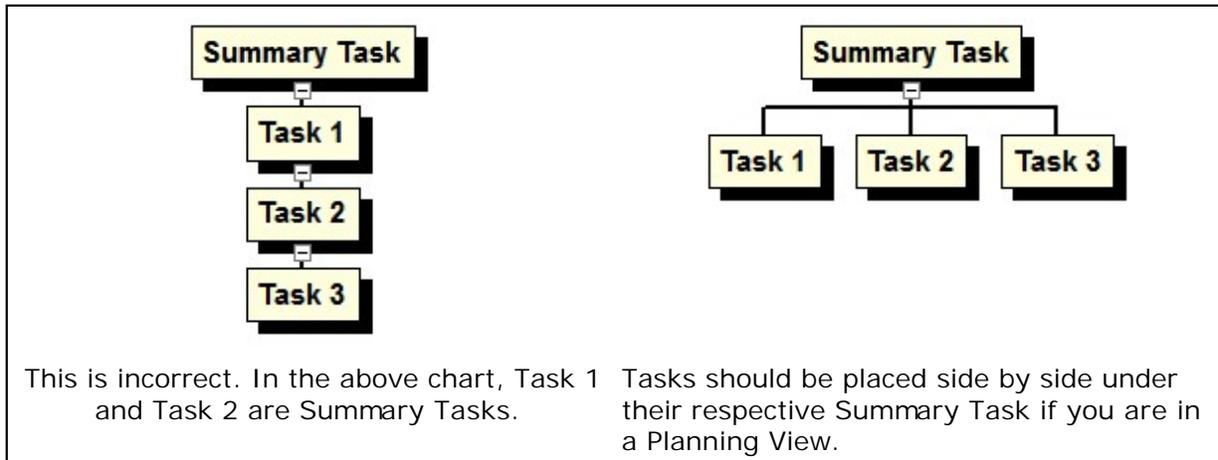
At the bottom, there are three buttons: "OK", "Cancel", and "Help". The "OK" button is highlighted with a dashed border.

The rolled up fields are grayed out and are read-only. You must edit the information in the Subtasks to change the values in the Summary Task.

Task Data is Grayed out = Incorrect Layout of Subtasks in a WBS Chart

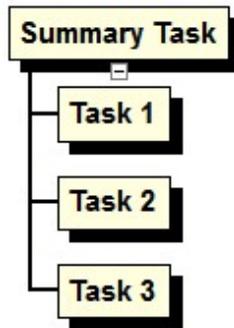
If the WBS is configured incorrectly what you think is a Task may really be a

Summary Task. Consider the following two WBS Charts:



Tasks 1 and 2 should not be added as Subtasks to the Summary Task but added as new tasks below the Summary Task. If you have a WBS Chart like the one on the left you can click and drag the Tasks around until you achieve the WBS Chart on the right.

Tip: If you are working in the WBS Chart View or have arranged subtasks of a Summary Task to display vertically you may have a chart that looks like this:



This is correct. Tasks 1, 2 & 3 are considered Tasks under this Summary Task even though they are listed vertically under the Summary Task. This is a Style of WBS Chart that takes properly configured Tasks and simply displays them vertically. You still want to avoid creating the WBS Chart as described in the incorrect example above.

## How do I edit Multiple Tasks at once?

To edit data for multiple tasks at the same time, select as many tasks (and/or summary tasks) as you wish and select the Task Info button on the Home tab. This displays the Task Information form.

The screenshot shows the 'Task Information (multiple tasks)' dialog box. It has a title bar with a close button (X). Below the title bar are five tabs: 'General', 'Custom', 'Flags', 'Hyperlink', and 'Notes'. The 'General' tab is selected. The form contains the following fields:

- Name: A text input field.
- Duration: A spin box.
- % Complete: A spin box showing '0%'.
- WBS: A text input field.
- Work: A spin box showing '0h'.
- Cost: A spin box showing '\$0.00'.
- Start: A date and time picker showing '01/17/2014 8:00 AM'.
- Finish: A date and time picker.
- Constraint Type: A dropdown menu showing 'As Soon As Possible'.
- Constraint Date: A date and time picker.
- Resource Names: A text input field with a 'Resources >>' button.

At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

Common data among the selected tasks is displayed. The fields where data is different in the selected tasks are blank. Changing any of the fields in the form will update each of the selected tasks with this new information.

If you have a Summary Task in your selection of tasks there may be fields that cannot be modified since these are fields calculated by the Summary Task. These fields will be grayed out and not editable. See [Why are some fields grayed out?](#)

How do I add Free-Form Text to a Chart?

See [Adding Text Boxes to a Chart](#)

How do I configure a new version of MS Project?

Microsoft Project 98 to Microsoft Project 2016

This version of WBS Schedule Pro is compatible with the following versions of Microsoft Project:

- Project 98
- Project 2000
- Project 2002
- Project 2003
- Project 2007
- Project 2010
- Project 2013
- Project 2016

This includes Project Standard and Professional versions of each of these and all Service Packs.

If you have WBS Schedule Pro installed and you upgrade your version of Microsoft Project to a supported version (listed above), you do not need to reinstall WBS Schedule Pro. To configure your new version of MS Project, do the following:

1. Start Microsoft Project.
2. Start WBS Schedule Pro and click the Microsoft Project drop down arrow on the Ribbon.
3. Select Setup Microsoft Project.

Follow the instructions to configure your new version of MS Project. If you do not see the WBS Schedule Pro buttons within Project after this try changing the Macro Security settings in MS Project to Low or Medium and repeat the steps above. For more troubleshooting tips, see Configuring MS Project in the Installation and Configuration section of this Help file.

Microsoft Project greater than Project 2016

If you have a version of MS Project greater than Project 2016, go to our website at [www.criticaltools.com](http://www.criticaltools.com) for an updated version of WBS Schedule Pro that is compatible with this new version.

## Why do Text Boxes in a Chart Shift when Printed?

When using the Add Text Box feature you may notice that Text Boxes shift from where you placed them in your chart to a slightly different place when you print the chart. The reason for this is that the Text Box is placed on the chart background and the chart may shift slightly on the page when printed to account for the variations in screen fonts and printer fonts.

Here are some tips:

1. Try displaying the chart using the Print Layout. To do this, click the View tab and choose Print Layout. This approximates the printed output where you can then drag the Text Boxes to better position them.
2. This only happens with Fixed Position Text Boxes. Linked Text Boxes that are associated with a Task will move with that Task as the chart shifts when printed. With that in mind, if the Text Box is not associated with a task but you would like it to appear in a certain location relative to a set of tasks, create a Link from a Task in the chart to the Text Box then doubleclick the Link and set the Link colors to White. This makes the link disappear but the Text Box still moves with the chart.

For more information on working with Text Boxes, see [Adding Text Boxes to a Chart](#)

## Why won't my characters display correctly?

When your character set won't display properly in WBS Schedule Pro it means that your System Locale is not set.

To fix this:

1. Open the Control Panel.
2. Select Region and Language.
3. Click the Administrative tab.
4. Select Change system locale and select your system locale from the list.

Reboot and your character set should now display properly in WBS Schedule Pro.

## Error Messages and Prompts

### Invalid Data

You have entered data into a field that is not valid for that field. Below are the most common of these messages and a short explanation of each.

**Invalid Resource** – Enter a valid resource from the list of Resources (as defined in Project-Resources). When assigning resources in the Task Information form, you must enter the exact name of an existing resource or you will receive the “Invalid Resource” message. Try using the Resources button to assign resource instead of typing them. To add, delete or change the names of resources, use the Resources form in the Project tab.

**Invalid Currency** – Enter a valid currency amount. You don’t have to include the currency symbol but you must enter an amount that can be converted into a currency value.

**Invalid Date** – Enter a valid date that corresponds to the date format defined in the Control Panel.

**Invalid Time** – Enter a valid time, including AM or PM if you are using the 12 hour format.

**Invalid Number** – Enter a valid number. You cannot enter text into a field that only accepts numbers.

**Invalid Measurement** – Enter a valid measurement.

**Invalid Duration** – Enter a valid Duration. You must use a valid duration unit such as Minute, Hour, Day, Week or Month or the abbreviations M, H, D, W or MO. For example, type 5d for 5 days, or 2w for 2 weeks.

**Invalid Percent** – Enter a valid Percent such as .50 or 50%.

**Invalid Flag** – Enter a valid Flag value. Flag fields can only accept Yes or No. There are several other Yes/No fields and you may get the Invalid Flag message even though they are not Flag fields. If you receive this message and the field you are editing is not a Flag field it means that it is simply a Yes/No field and you can only enter Yes or No into that field.

**Invalid File** – Enter a valid filename avoiding characters like \*, ? or /.

**Invalid Folder** – Enter a valid folder.

**Invalid Dependency** – Enter a valid dependency value. If you are entering information directly into the Predecessor or Successor field, you must enter the ID#

of the Predecessor or Successor task. Multiple predecessors or successors must be separated by a comma (or by the Windows List Separator). You can also enter the type of dependency by using FS, SS, FF, or SF (finish to start, start to start, finish to finish and start to finish). For example, entering the predecessor for a task you could type:

4 – Makes task #4 the predecessor to the current task with a FS (Finish to Start) dependency. Just entering the dependency number defaults to a Finish to Start dependency.

4,6,10 – Makes tasks #4, #6 and #10 predecessors to the current task.

4SS – Makes task #4 the predecessor to the current task with a Start to Start dependency.

4FS+5d – Makes task number 4 the predecessor to the current task with a FS dependency plus a 5 day lag.

## Unable to Start Microsoft Project

This message appears when the WBS Schedule Pro program cannot start Microsoft Project or cannot communicate with Microsoft Project. WBS Schedule Pro uses DDE and OLE to communicate with Microsoft Project and if for some reason this communication is not working, this message will appear.

Here are some things to check and try:

Make sure you are using a supported version of Microsoft Project - If a new version of MS Project was released after the version of WBS Schedule Pro you are using, the two programs may not be compatible. Check our website for an update to WBS Schedule Pro. WBS Schedule Pro can only work with versions of MS Project that it knows about.

Try a Reset and/or Repair - Try closing all open applications and reboot your computer. This may reinitialize the necessary files needed to communicate with Microsoft Project. If this does not work, try repairing or reinstalling Microsoft Project. Microsoft Project should install all of the necessary files for this communication to take place so reinstalling Microsoft Project may help solve this problem.

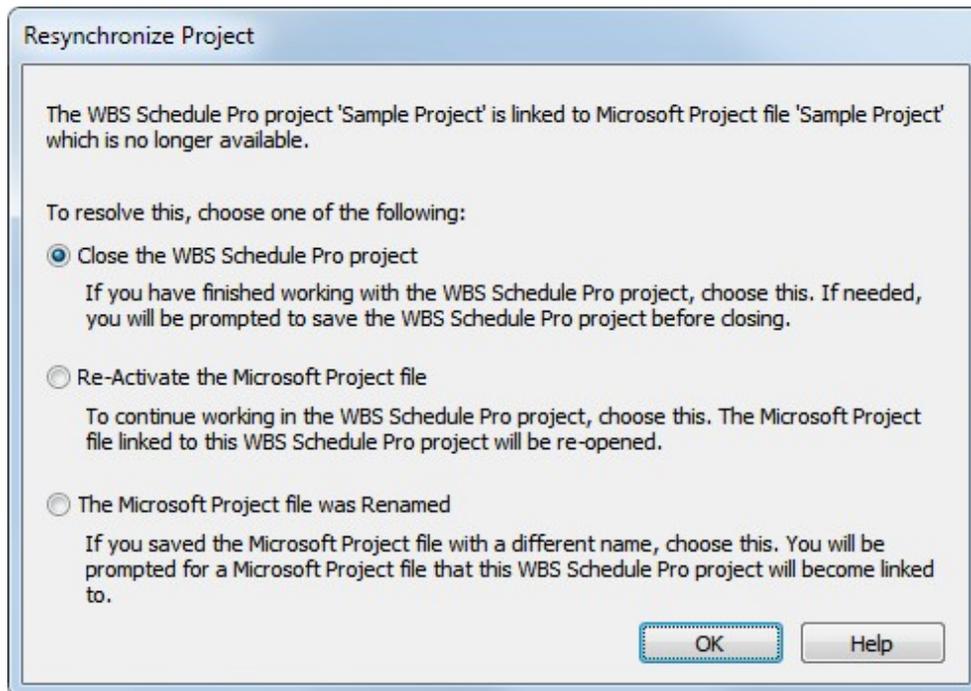
Permissions must match - Make sure you are running WBS Schedule Pro and Microsoft Project with the same permissions. If you are running one program as an Administrator the other not as an Administrator then they will not communicate with each other. Right click the icon you use to start each program and go to Properties. There will be an option to "Run this program as an administrator". Make sure both WBS Schedule Pro and Microsoft Project have the same setting.

Turn off Firewall - Ordinarily a firewall will not prevent WBS Schedule Pro and Microsoft Project from communicating but some do so try turning off any firewall or security software that may be interfering with this communication.

## Resynchronize Project

This message appears when you are linked to a Microsoft Project plan and this plan is no longer available. This typically happens when you have created a WBS Schedule Pro project from a Microsoft Project plan and then close the Microsoft Project plan before closing the WBS Schedule Pro plan. Since the data for a linked project resides in Microsoft Project this plan must remain open in Microsoft Project to continue working with the WBS Schedule Pro project.

The message offers three options for resolving this. Select one to continue.



## Unable to Open Linked Data File

There are two variations of this message, each is explained below.

Unable to Open Linked Data File – This data file is already in use by another chart.

This message appears when you attempt to open a WBS Schedule Pro file that is linked to a datasource and this datasource is already in use by another file. For example, you cannot open a WBS Schedule Pro file that is linked to Microsoft Project plan *xxx.mpp* if another WBS Schedule Pro file is currently open and is linked to Microsoft Project *xxx.mpp*. Close the first file if you wish to open the second file linked to *xxx.mpp*.

Unable to Open Linked Data File – The data file could not be found.

This message appears when you attempt to open a WBS Schedule Pro file that is linked to a datasource and it can't find the datasource. It could be that you deleted the datasource file, moved it or renamed it. If you moved or renamed the datasource, you can relink the WBS Schedule Pro file to the appropriate datasource file. Choose Yes to browse for the datasource file or No to cancel the Open operation.

## Confirm Unlink

This message allows you to confirm that you want to remove the link to the datasource. For a complete description of this topic, see [Unlink](#)

## Unable to Save Image

This message appears when you are attempting to save a WBS or Network Chart as a picture (using a .JPG or .PNG file, for example) and WBS Schedule Pro cannot save this image. This message ultimately comes from Windows telling WBS Schedule Pro that it is unable to save the file. There is no known solution to this at this time other than to reduce the size of the chart.

You could also try the Copy Picture button which saves the chart to the Clipboard, using an alternate file format such as a .ENF file or printing the chart to a PDF file.

## Overwriting HTML Files

This message appears when you use the Save As Web Pages dialog box to save a set of HTML documents to the same name in the same folder. Saying Yes to update the HTML files will delete all files with the same name from the specified folder and create new HTML files of the latest chart. Select No to save the Web Pages to a new name or to a new folder.

See also [Save As Web Pages](#)

## Demo Limits Exceeded

You are currently using the Demonstration version of WBS Schedule Pro and you have exceeded the limits of the Demo version.

The Demo version of WBS Schedule Pro is limited to 50 tasks and expires 30 days after installation. The 50 task limit applies to Creating/Modifying Tasks, Printing, Saving and Transferring WBS Schedule Pro files to Microsoft Project. The 50 task limit does not apply when you create a chart from a Microsoft Project plan. Therefore, you can use the Demo version to test how your large Microsoft Project plans are displayed and you can even use Print Preview to see how they would be printed.

Upon your purchase, the Demo version of WBS Schedule Pro can be turned into the Full version, including while you are currently running the Demo version.

To turn the Demo version of WBS Schedule Pro into the Full version:

1. Within WBS Schedule Pro, choose the File menu and Register.
2. Enter your Name, Organization, Email and Purchase Code that you received after your purchase.

You must have a valid Purchase Code to turn the Demo into the Full version. To purchase WBS Schedule Pro and obtain a Purchase Code, visit our [website](#) or contact Critical Tools at: [Company Address](#)

## Contacting Critical Tools, Inc.

### Company Address

Critical Tools, Inc. makes and distributes the Windows-based project management software, WBS Schedule Pro.

Contact:           Critical Tools, Inc.  
                      7308 West Rim Drive  
                      Austin, Texas 78731  
                      USA

Phone:             512-342-2232

Fax:                512-342-2234

Website:          [www.criticaltools.com](http://www.criticaltools.com)

Our website contains a detailed description of WBS Schedule Pro plus a downloadable demo version, online ordering and the latest product announcements.

Sales Email:      [sales@criticaltools.com](mailto:sales@criticaltools.com)

Support            [support@criticaltools.com](mailto:support@criticaltools.com)  
Email:

Critical Tools, Inc. is a Microsoft Certified Partner. In addition, Critical Tools has fulfilled all requirements and is active in the ISV/Software Solutions Competency of the Microsoft Certified Partner program. As part of this process, Critical Tools' software was independently tested and certified. Testing was conducted independently by VeriTest, a testing service of Lionbridge Technologies.



ISV/Software Solutions

## Support

Critical Tools, Inc. offers free support for the current version of the WBS Schedule Pro software. You can obtain support in the following ways:

Phone Support: +1 512-342-2232

Support Hours: 8:00am – 5:00pm US Central Time (Monday – Friday)

Email Support: [support@criticaltools.com](mailto:support@criticaltools.com)

The majority of the time we can respond to your email inquiries the same day. Less frequently it will take us up to 24 hours. If you do not hear from us in 24 hours, we suggest you email again or call us at the number above.

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