

Adding Task Predecessors and Successors in the WBS

Definitions

Predecessor: a task upon which the current task is dependent. A predecessor task must be started or completed prior to starting or completing the current task.

Successor: a task that depends on the current task. A successor task can only be started or completed once the current task has started or completed.

Icons in this job aid



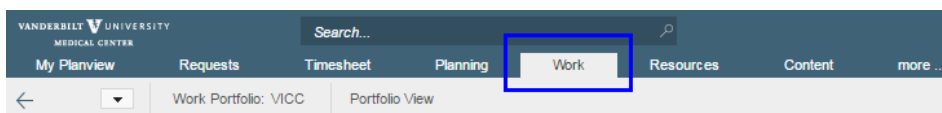
Information

Steps

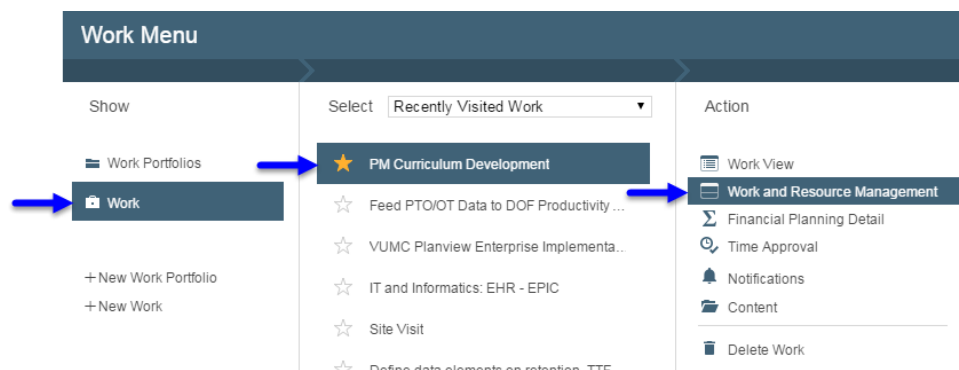
Open Work Item

Open the Project Indicator Template

1. Log into Planview: <https://vumc.pvcloud.com/planview/> .
2. Click **Work** to open the Work Menu.



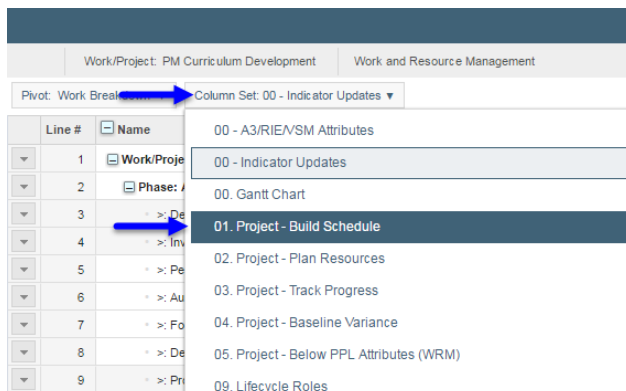
3. In the Work menu, show **Work**, select the work (project) you need, then choose **Work and Resource Management** in the action menu.



Adding Task Predecessors and Successors in the WBS

Add Predecessors and Successors

1. Click **Column Set** and select **01. Project – Build Schedule**.



2. Double-click in the **Predecessors** column of the task row for which you want to add a predecessor.

Work/Project: PM Curriculum Development		Work and Resource Management									
Pivot: Work Breakdown		Column Set: 01. Project - Build Schedule									
	Line #	Name	Work Type	Work Status	Schedule Start	Duration	Schedule Finish	Milestone Flag	Milestone Type	Predecessors	Successors
	1	Work/Project: PM Curriculum Developm...	Enterprise -	Open/Approv	2/6/2017	119.0d	7/24/2017	No			
	2	Phase: Assessment	Enterprise -	Open/Approv	2/6/2017	10.0d	2/17/2017	No			
	3	>: Determine intended audience	Enterprise -	Completed				No			
	4	>: Inventory existing PM training	Enterprise -	Completed				No			
	5	>: Peer institution review	Enterprise -	Assumed Coi				No			
	6	>: Audience survey open	Enterprise -	Open/Approv	2/6/2017	10.0d	2/17/2017	No			
	7	>: Focus groups and interviews	Enterprise -	Open/Approv	2/6/2017	5.0d	2/10/2017	No			
	8	>: Develop project charter	Enterprise -	Assumed Coi				No			
	9	>: Project Charter Approved	Enterprise -	Completed				Yes	Deliverable		

3. Click the small **arrow** to open the predecessor task chooser.

Work/Project: PM Curriculum Development		Work and Resource Management									
Pivot: Work Breakdown		Column Set: 01. Project - Build Schedule									
Line #	Name	Work Type	Work Status	Schedule Start	Duration	Schedule Finish	Milestone Flag	Milestone Type	Predecessors	Successors	Cons
1	Work/Project: PM Curriculum Developm...	Enterprise -	Open/Approv	2/6/2017	119.0d	7/24/2017	No				
2	Phase: Assessment	Enterprise -	Open/Approv	2/6/2017	10.0d	2/17/2017	No				
3	>: Determine intended audience	Enterprise -	Completed				No				
4	>: Inventory existing PM training	Enterprise -	Completed				No				
5	>: Peer institution review	Enterprise -	Assumed Coi				No				
6	>: Audience survey open	Enterprise -	Open/Approv	2/6/2017	10.0d	2/17/2017	No				
7	>: Focus groups and interviews	Enterprise -	Open/Approv	2/6/2017	5.0d	2/10/2017	No				
8	>: Develop project charter	Enterprise -	Assumed Coi				No				
9	>: Project Charter Approved	Enterprise -	Completed				Yes	Deliverable			

- a. If your predecessor is in the same project, scroll down the list of tasks within the WBS to find the task you need. Click the task.

Adding Task Predecessors and Successors in the WBS

Work/Project: PM Curriculum Development				Work and Resource Management								
Pivot: Work Breakdown		Column Set: 01. Project - Build Schedule										
	Line #	Name	Work Type	Work Status	Schedule Start	Duration	Schedule Finish	Milestone Flag	Milestone Type	Predecessors	Successors	
▼	1	Work/Project: PM Curriculum Develop...	Enterprise -	Open/Approv	2/6/2017	119.0d	7/24/2017	No				
▼	2	Phase: Assessment	Enterprise -	Open/Approv	2/6/2017	10.0d	2/17/2017	No				
	3	>: Determine intended audience	Enterprise -	Completed				No				
▼	4	>: Inventory existing PM training	Enterprise -	Completed				No				
▼	5	>: Peer institution review	Enterprise -	Assumed Coi				No				
▼	6	>: Audience survey open	Enterprise -	Open/Approv	2/6/2017	10.0d	2/17/2017	No				
▼	7	>: Focus groups and interviews	Enterprise -	Open/Approv	2/6/2017	5.0d	2/10/2017	No				▼
▼	8	>: Develop project charter	Enterprise -	Assumed Coi				No				▼
▼	9	>: Project Charter Approved	Enterprise -	Completed				Yes	Deliverable	Line 1 : PM Curriculum Deve...		
▼	10	Phase: Design	Enterprise -	Open/Approv	2/6/2017	23.0d	3/8/2017	No		Line 2 : Assessment		
▼	11	>: Design training curriculum	Enterprise -	Open/Approv				No		Line 3 : Determine intended a...		
▼	12	>: Determine performance objectives	Enterprise -	Open/Approv	2/6/2017	23.0d	3/8/2017	No		Line 4 : Inventory existing PM...		
▼	13	>: Design performance support pro...	Enterprise -	Open/Approv	2/6/2017	1.0d	2/6/2017	No		Line 5 : Peer institution review		▼
▼	14	>: Develop evaluation plan	Enterprise -	Open/Approv				No		Select values in Data Picker...		

- b. If your predecessor is in a different project, click **Select values in Data Picker**. Once the data picker opens, you can navigate through the hierarchy of projects to which you have access. Click the project phase or task(s) within the phase that are predecessors to your task. If you cannot find the project you need, please [contact the EPMO](#) for assistance.
- c. Repeat either process above to add as many predecessors to the task as needed.

Note: The same processes above can be used to add successors in the same project or different projects. Use the **Successor** column instead of the Predecessor column.

View Predecessors and Successors in the WBS

Note: Predecessor and successor tasks within the same project appear in the WBS as a number (e.g., “6” = the task on Line 6 in your WBS.) Predecessors and successors within other projects are represented by an asterisk (*). To view these, follow the steps below:

1. Click the **arrow** in the far left column for the task row with a * predecessor or successor.

Work/Project: PM Curriculum Development										Work and Resource Management	
Pivot: Work Breakdown		Column Set: 01. Project - Build Schedule									
	Line #	Name	Work Type	Work Status	Schedule Start	Duration	Schedule Finish	Milestone Flag	Milestone Type	Predecessors	
	1	Work/Project: PM Curriculum Developm...	Enterprise -	Open/Approv	2/6/2017	119.0d	7/24/2017	No			
	2	Phase: Assessment	Enterprise -	Open/Approv	2/6/2017	10.0d	2/17/2017	No			
	3	>: Determine intended audience	Enterprise -	Completed				No			
	4	>: Inventory existing PM training	Enterprise -	Completed				No			
	5	>: Peer institution review	Enterprise -	Assumed Coi				No			
	6	>: Audience survey open	Enterprise -	Open/Approv	2/6/2017	10.0d	2/17/2017	No		3	
	7	>: Focus groups and interviews	Enterprise -	Open/Approv	2/6/2017	5.0d	2/10/2017	No			

Adding Task Predecessors and Successors in the WBS

2. Click Task Information.

Work/Project: PM Curriculum Development Work and Resource Management

Pivot: Work Breakdown Column Set: 01. Project - Build Schedule

Line #	Name	Work Type	Work Status	Schedule Start	Duration	Schedule Finish	Milestone Flag	Milestone Type	Predecessors
1	Work/Project: PM Curriculum Developm...	Enterprise -	Open/Approv	2/6/2017	119.0d	7/24/2017	No		
2	Phase: Assessment	Enterprise -	Open/Approv	2/6/2017	10.0d	2/17/2017	No		
3	>: Determine intended audience	Enterprise -	Completed				No		
4	>: Inventory existing PM training	Enterprise -	Completed				No		
5	>: Peer institution review	Enterprise -	Assumed Coi				No		
6	>: Audience survey open	Enterprise -	Open/Approv	2/6/2017	10.0d	2/17/2017	No		3
	and interviews	Enterprise -	Open/Approv	2/6/2017	5.0d	2/10/2017	No		
	Task Information...	Enterprise -	Assumed Coi				No		
	Relationships	Enterprise -	Completed				Yes	Deliverable	
	Assignments	Enterprise -	Open/Approv	2/6/2017	23.0d	3/8/2017	No		
	Work Detail...	Enterprise -	Open/Approv				No		
	Baseline Management...	Enterprise -	Open/Approv	2/6/2017	23.0d	3/8/2017	No		
	Content...	Enterprise -	Open/Approv	2/6/2017	1.0d	2/6/2017	No		
	Estimating	Enterprise -	Open/Approv				No		
	Delete	Enterprise -	Open/Approv				No		

3. The Task Information window opens to the Predecessors or Successors tab to provide a full list of all predecessors to this task. The project title for each predecessor task appears in the **Work Description** column.

Audience survey open Require Reserve Allocate Authorize **Predecessors** Successors Notes To Do List

New Predecessor

Work ID	Work Description	Predecessor Description	Type	Lag	Calendar
1005113	PM Curriculum Dev	Determine intended audience	FS		Standard

- Note:** The default view for the Task Information window is a new pop-up window on top of the Work and Resource Management window. To collapse the extra pop-up window to appear at the bottom of the Work and Resource Management window, click the “**pop-in**” button in the upper right corner of the Task Information window.

Task Information: Audience survey open

Require Reserve Allocate Authorize **Predecessors** Successors Notes To Do List

New Predecessor Enter text to filter grid Export As...

Work ID	Work Description	Predecessor Description	Type	Lag	Calendar
1005113	PM Curriculum Dev	Determine intended audience	FS		Standard

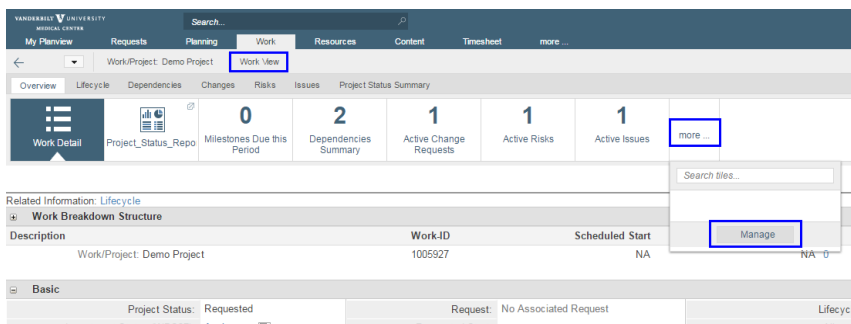
The Task Information window will now appear every time you open the Work and Resource Management window, in a divided screen format.

Adding Task Predecessors and Successors in the WBS

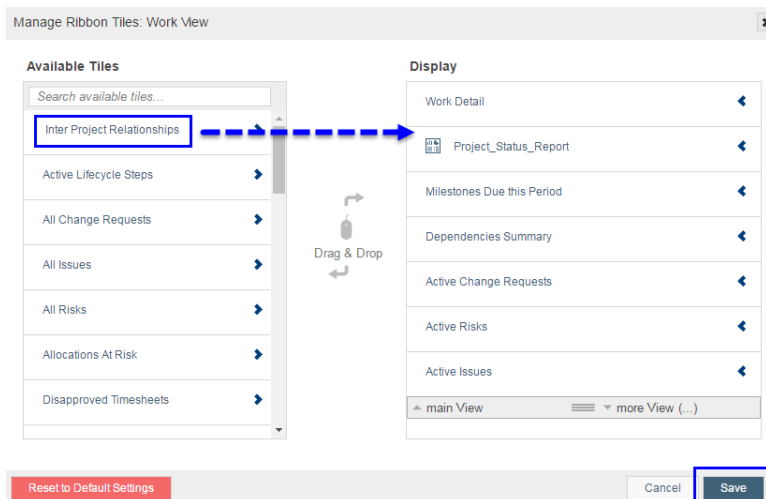
View Predecessors and Successors Using the Inter Project Relationships Tile

i Follow these steps to see at a glance if any of your projects have predecessor or successor tasks in other projects.

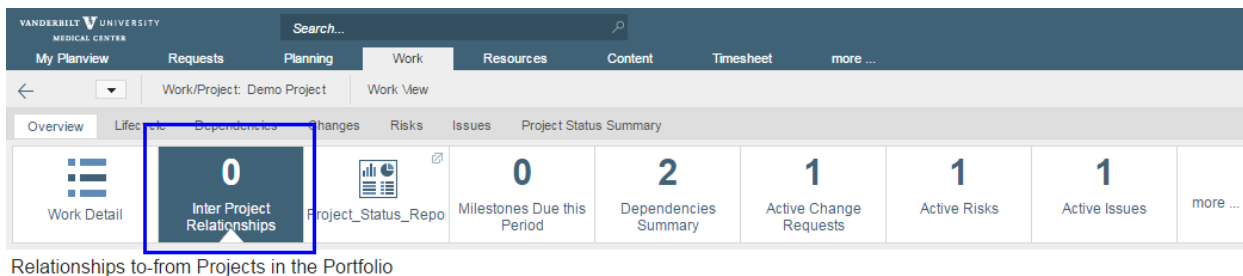
1. From the project's the Work view, click **...more** then **Manage** to open the **Manage Ribbon Tiles** window.



2. In Manage Ribbon Tiles, drag and drop the tile called **Inter Project Relationships** from the **Available Tiles** list to the **Displayed Tiles** list. Click **Save**.



3. Click the **Inter Project Relationships** tile. If the current project has predecessor or successor tasks from other projects in its WBS, they will appear here in a list.



i Note: This tile can also be added in the Work Portfolio View, to see Inter Project Relationships for all projects within a Work Portfolio.