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/](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.
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Add Predecessors and Successors

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

   ![Column Set Selection]

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

   ![Predecessors Column]

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

   ![Predecessor Task Chooser]

   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.
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.
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2. Click Task Information.

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.

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.

The Task Information window will now appear every time you open the Work and Resource Management window, in a divided screen format.
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View Predecessors and Successors Using the Inter Project Relationships Tile

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.

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