

Building the Work Breakdown Structure (WBS) in Planview

Definitions

Baseline: A formally approved version of the project schedule and/or budget that is used as the benchmark for comparing future progress as the project is completed.

Milestone: A significant event in the project, usually completion of a phase or of a major deliverable.

Work: In Planview, projects and programs are documented as Work.


WBS: The Work Breakdown Structure (WBS) is a hierarchical structure in which work items or project elements are broken down into smaller work packages, with larger activities often dependent on the completion of the smaller activities that make them up. Each descending level represents an increasingly detailed definition of the project objective. In Planview, each project entered as Work has a unique WBS, which must be built and updated in order to generate project status reports.

Icons in this job aid



Information

Steps

-  This process is usually completed as part of the Work lifecycle after new Work has been entered in Planview. The steps on this job aid assume completion of the [Creating New Work](#) job aid.

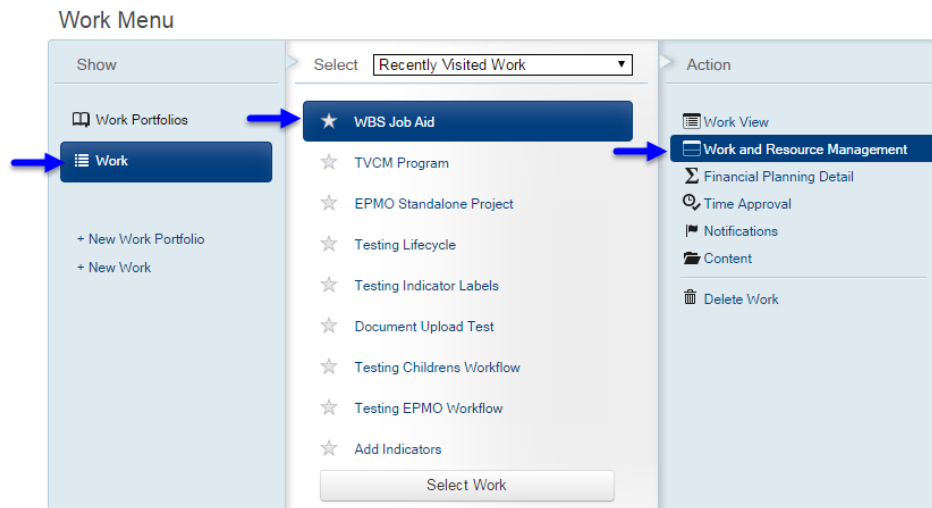
Open Work and Resource Management

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



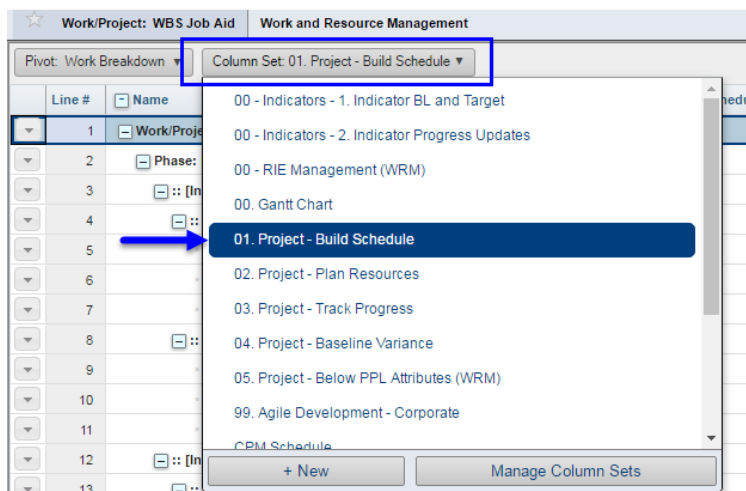
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3. Show **Work**, select the work you want to open, then choose **Work and Resource Management** as your action.



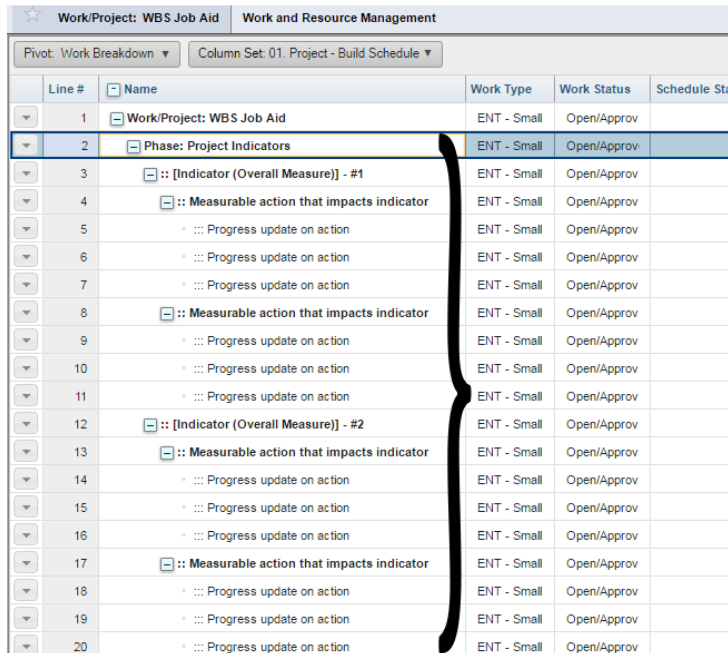
Set Up the WBS

1. The Work and Resource Management tool opens in a new window. The default Column Set should be set to **01. Project – Build Schedule**. If this column set is not chosen, click the **Column Set** list to choose this set.



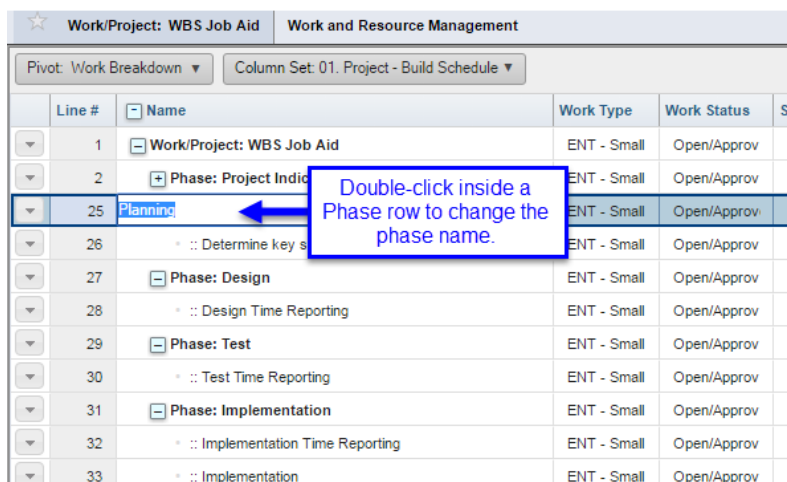
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- Once the Build Schedule column set is chosen, the WBS template becomes available for editing. If your project is using Indicators to track progress on key metrics, follow the steps in the [Adding Project Indicators](#) job aid to complete the **Phase: Project Indicators** section of the WBS.



Work/Project: WBS Job Aid		Work and Resource Management		
Pivot: Work Breakdown		Column Set: 01. Project - Build Schedule		
Line #	Name	Work Type	Work Status	Schedule Sta
1	Work/Project: WBS Job Aid	ENT - Small	Open/Approv	
2	Phase: Project Indicators	ENT - Small	Open/Approv	
3	Indicator (Overall Measure) - #1	ENT - Small	Open/Approv	
4	Measurable action that impacts indicator	ENT - Small	Open/Approv	
5	Progress update on action	ENT - Small	Open/Approv	
6	Progress update on action	ENT - Small	Open/Approv	
7	Progress update on action	ENT - Small	Open/Approv	
8	Measurable action that impacts indicator	ENT - Small	Open/Approv	
9	Progress update on action	ENT - Small	Open/Approv	
10	Progress update on action	ENT - Small	Open/Approv	
11	Progress update on action	ENT - Small	Open/Approv	
12	Indicator (Overall Measure) - #2	ENT - Small	Open/Approv	
13	Measurable action that impacts indicator	ENT - Small	Open/Approv	
14	Progress update on action	ENT - Small	Open/Approv	
15	Progress update on action	ENT - Small	Open/Approv	
16	Progress update on action	ENT - Small	Open/Approv	
17	Measurable action that impacts indicator	ENT - Small	Open/Approv	
18	Progress update on action	ENT - Small	Open/Approv	
19	Progress update on action	ENT - Small	Open/Approv	
20	Progress update on action	ENT - Small	Open/Approv	

- The Phases have been given titles in the WBS template that coincide with project phases widely used in project management. If your project needs more specific phase titles, you can double-click in the Phase row to change its name.

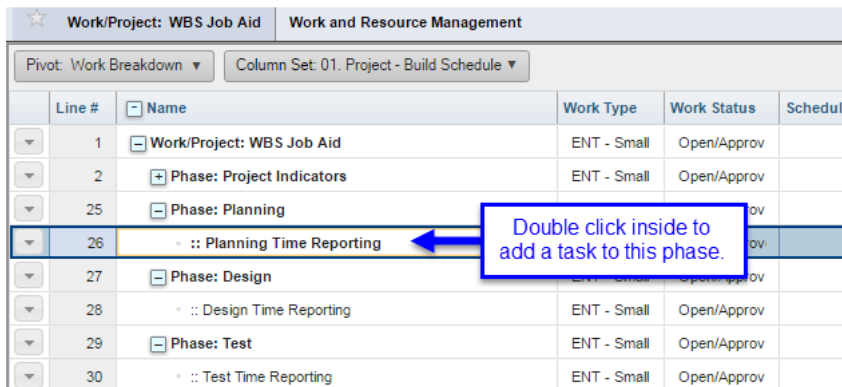


Work/Project: WBS Job Aid		Work and Resource Management		
Pivot: Work Breakdown		Column Set: 01. Project - Build Schedule		
Line #	Name	Work Type	Work Status	S
1	Work/Project: WBS Job Aid	ENT - Small	Open/Approv	
2	Phase: Project Indicators	ENT - Small	Open/Approv	
25	Planning	ENT - Small	Open/Approv	
26	Determine key s	ENT - Small	Open/Approv	
27	Phase: Design	ENT - Small	Open/Approv	
28	Design Time Reporting	ENT - Small	Open/Approv	
29	Phase: Test	ENT - Small	Open/Approv	
30	Test Time Reporting	ENT - Small	Open/Approv	
31	Phase: Implementation	ENT - Small	Open/Approv	
32	Implementation Time Reporting	ENT - Small	Open/Approv	
33	Implementation	ENT - Small	Open/Approv	

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Add Tasks to the WBS

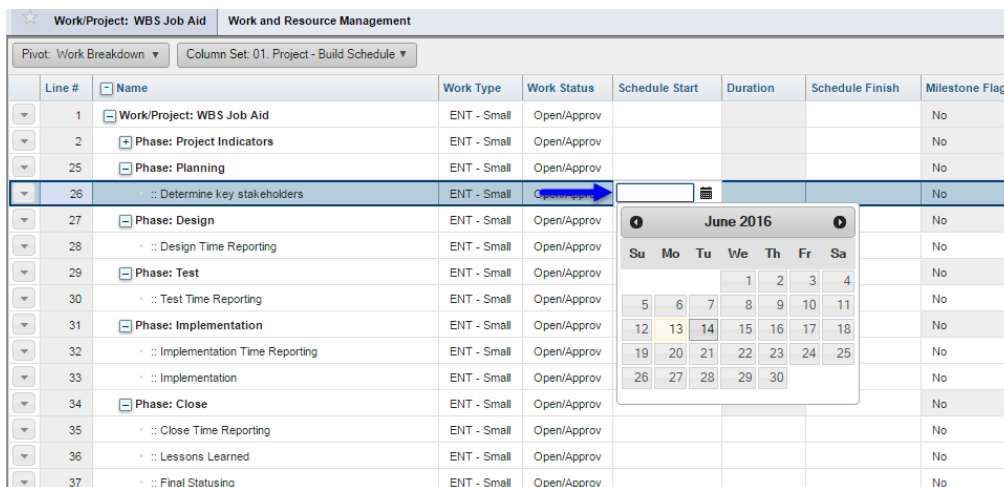
1. Double-click in a template row to add a project task to your WBS.



The screenshot shows the 'Work/Project: WBS Job Aid' table. A callout box with a blue arrow points to the 'Planning Time Reporting' task (Line # 26), with the text: 'Double click inside to add a task to this phase.'

Line #	Name	Work Type	Work Status	Schedule
1	Work/Project: WBS Job Aid	ENT - Small	Open/Approv	
2	Phase: Project Indicators	ENT - Small	Open/Approv	
25	Phase: Planning			
26	:: Planning Time Reporting			
27	Phase: Design			
28	:: Design Time Reporting	ENT - Small	Open/Approv	
29	Phase: Test	ENT - Small	Open/Approv	
30	:: Test Time Reporting	ENT - Small	Open/Approv	

2. Double-click in each column in this task's row to update its information. For example, double-click inside **Schedule Start** to add a start date for this task.



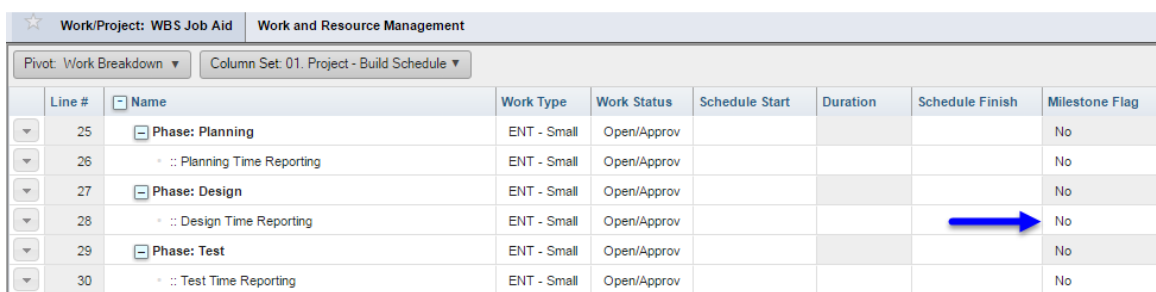
The screenshot shows the 'Work/Project: WBS Job Aid' table. A callout box with a blue arrow points to the 'Determine key stakeholders' task (Line # 26), with the text: 'Double click inside to add a task to this phase.'

Line #	Name	Work Type	Work Status	Schedule Start	Duration	Schedule Finish	Milestone Flag
1	Work/Project: WBS Job Aid	ENT - Small	Open/Approv				No
2	Phase: Project Indicators	ENT - Small	Open/Approv				No
25	Phase: Planning	ENT - Small	Open/Approv				No
26	:: Determine key stakeholders	ENT - Small	Open/Approv				No
27	Phase: Design	ENT - Small	Open/Approv				No
28	:: Design Time Reporting	ENT - Small	Open/Approv				No
29	Phase: Test	ENT - Small	Open/Approv				No
30	:: Test Time Reporting	ENT - Small	Open/Approv				No
31	Phase: Implementation	ENT - Small	Open/Approv				No
32	:: Implementation Time Reporting	ENT - Small	Open/Approv				No
33	:: Implementation	ENT - Small	Open/Approv				No
34	Phase: Close	ENT - Small	Open/Approv				No
35	:: Close Time Reporting	ENT - Small	Open/Approv				No
36	:: Lessons Learned	ENT - Small	Open/Approv				No
37	:: Final Statusing	ENT - Small	Open/Approv				No



Note: You may not use every column for every task row. Keep in mind that the WBS can be edited at any time during the project lifecycle. Also remember that the project status reports pull information from the WBS, so it's important to complete as much as possible.

3. Each task row contains a field called **Milestone Flag**. Click inside the Milestone Flag field to select whether each task is a milestone in your project.



The screenshot shows the 'Work/Project: WBS Job Aid' table. A blue arrow points to the 'Milestone Flag' column for the 'Design Time Reporting' task (Line # 28).

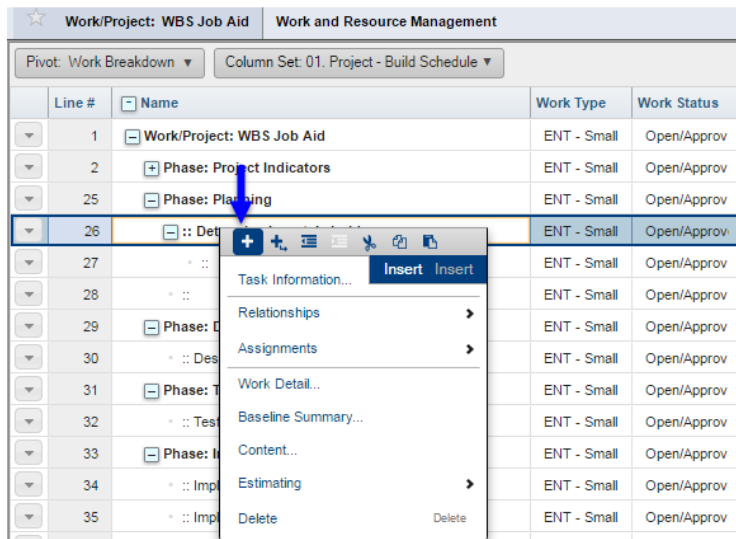
Line #	Name	Work Type	Work Status	Schedule Start	Duration	Schedule Finish	Milestone Flag
25	Phase: Planning	ENT - Small	Open/Approv				No
26	:: Planning Time Reporting	ENT - Small	Open/Approv				No
27	Phase: Design	ENT - Small	Open/Approv				No
28	:: Design Time Reporting	ENT - Small	Open/Approv				No
29	Phase: Test	ENT - Small	Open/Approv				No
30	:: Test Time Reporting	ENT - Small	Open/Approv				No



Note: Tasks with the Milestone Flag marked "Yes" appear on the Project Status Report in Planview, so it's important to note which tasks are milestones.

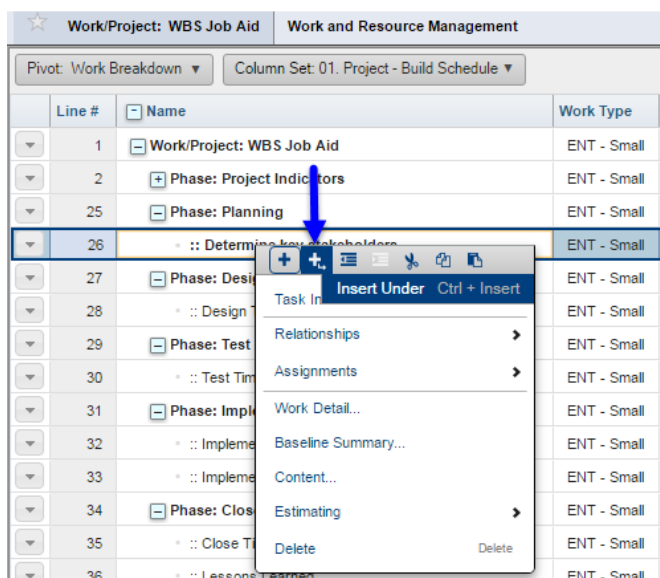
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- To add more rows to each phase of the WBS template, right click on the task you just entered, then select the Insert **+** icon. This creates a new task at the same detail level as your previous task.



- i** Note: The template is structured such that tasks are automatically indented under phases. You may also want to create sub-tasks (referred to as “children” in Planview), which are further indented under tasks.

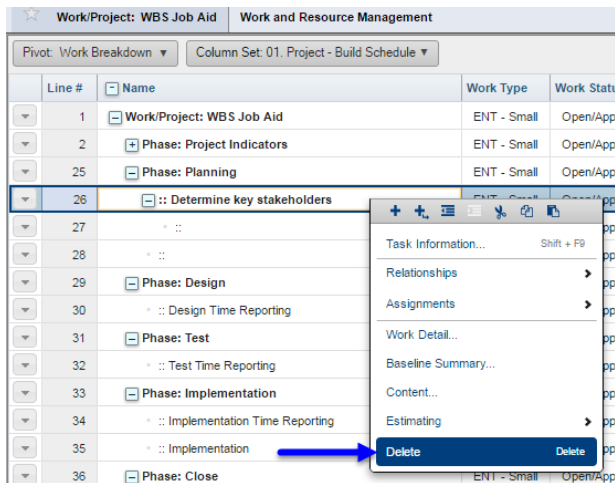
- To create a sub-task (child) for a particular task, right-click the task and click the **Insert Under** **+** icon.



- i** Note: You can build a WBS with up to five levels of tree structure (i.e., three levels of nested subtasks under each phase and task).

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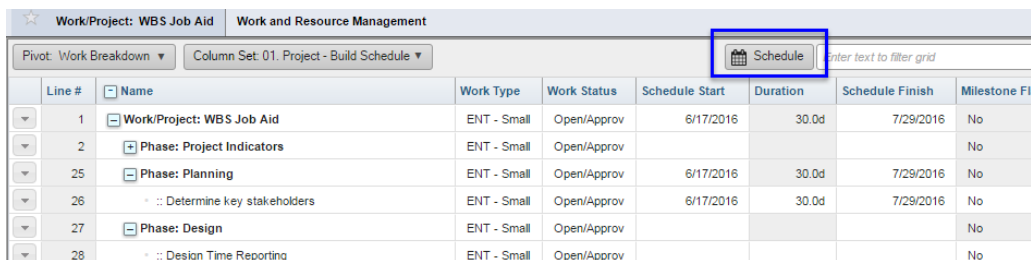
- To delete a task or sub-task from your WBS, right click inside the corresponding row and click **Delete**.



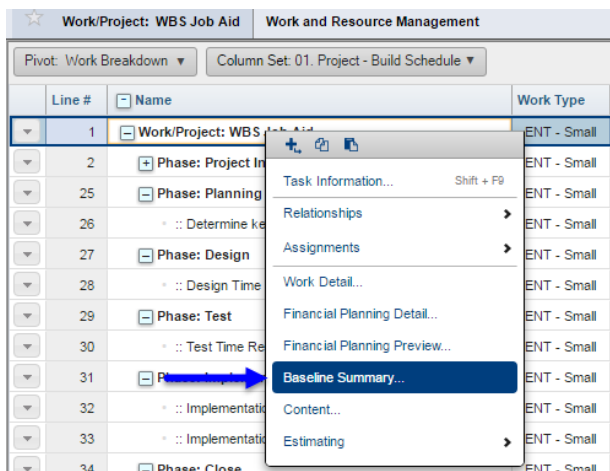
- Repeat steps 1-6 as much as needed to fully account for all tasks and sub-tasks in your project's WBS.

Update Schedule & Create Baseline

- After you have completing adding task and schedule information to your WBS, click the **Schedule** button to generate a schedule for the full project.



- Right click in row 1, where your project title is located. Click **Baseline Summary** to open the baseline window.



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3. In the baseline window, click **Create New Baseline**.



4. In the New Baseline window, type a **Baseline Name**. Select “Active” to mark this new baseline as your current active baseline. Select “Locked” to prevent other Planview users (co-Project Managers, for example) from making changes to this baseline. Add comments if needed about when and why this baseline was created. Click **Save**.

A screenshot of the 'New Baseline' dialog box. The dialog box has a title bar with 'New Baseline' and a close button. Inside the dialog box, there is a text input field for 'Baseline Name:'. Below it are two checkboxes: 'Active:' and 'Locked:'. To the left of these checkboxes is a large blue plus sign. Below the checkboxes is a text area for 'Comments:'. At the bottom of the dialog box are two buttons: 'Cancel' and 'Save'.