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

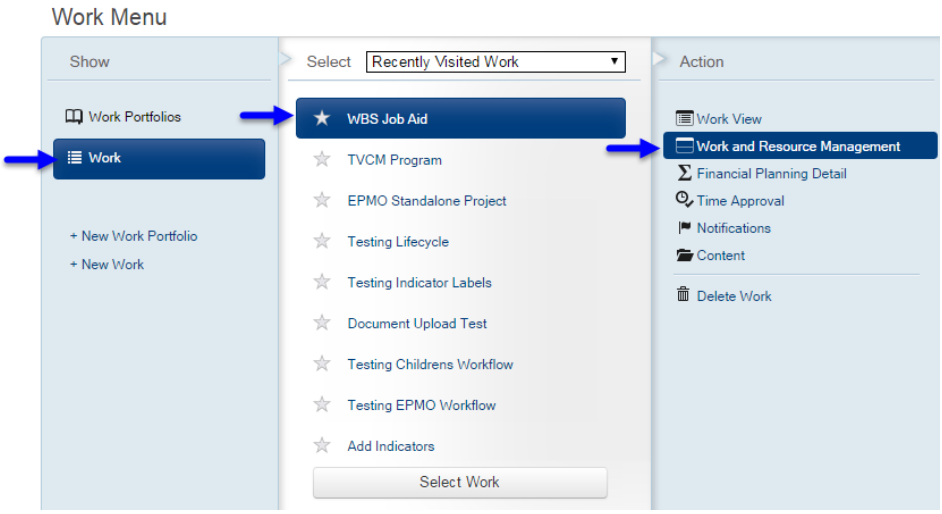
Steps

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

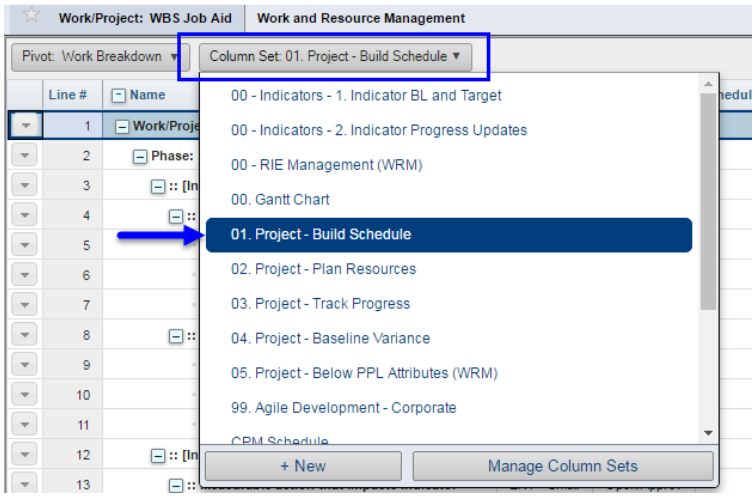
1. Log into Planview: https://vumc.pvcloud.com/planview/.
2. Click **Work** to open the Work menu.

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

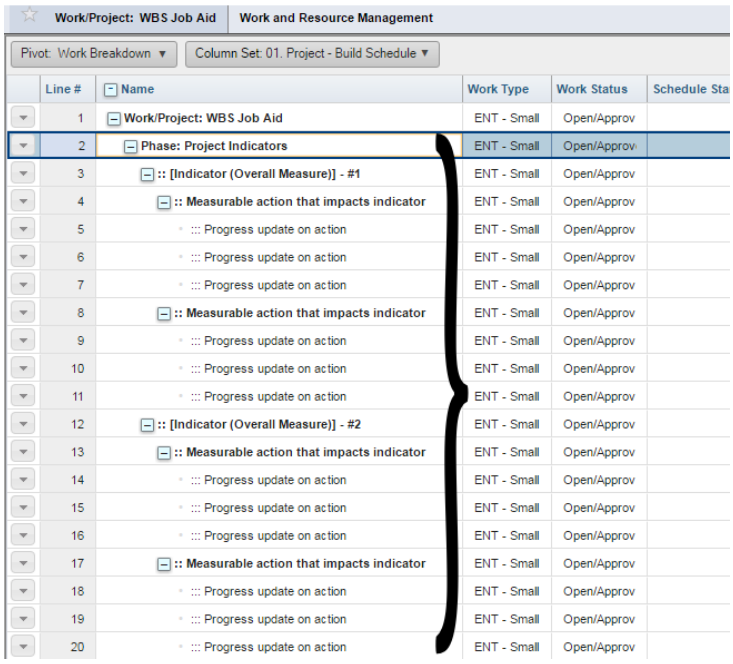


Set Up the WBS

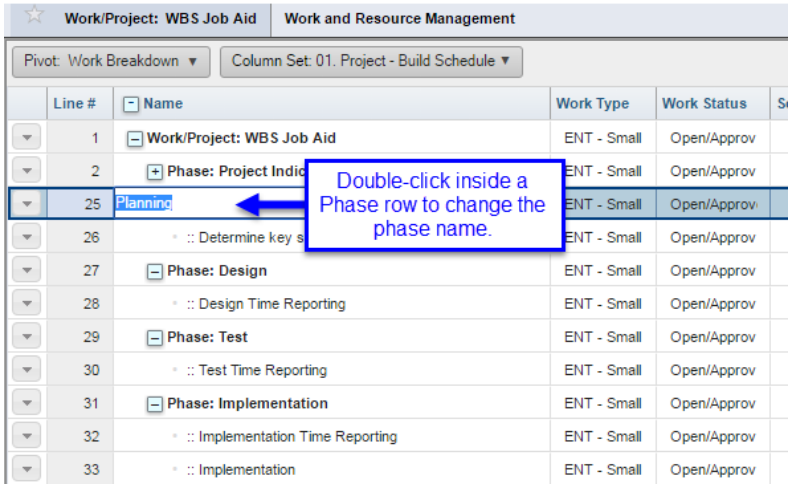
1. The Work and Resource Management tool opens in a new window. The default Column Set should be set to **01. Project – Build Schedule**. If this column set is not chosen, click the **Column Set** list to choose this set.



2. 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.



3. 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.



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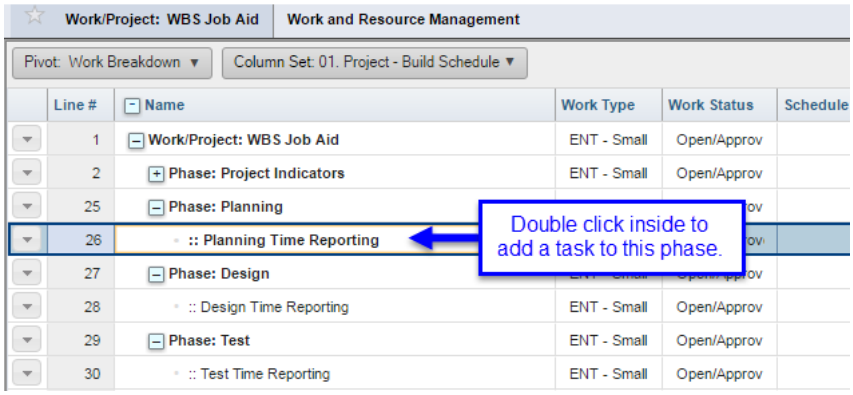
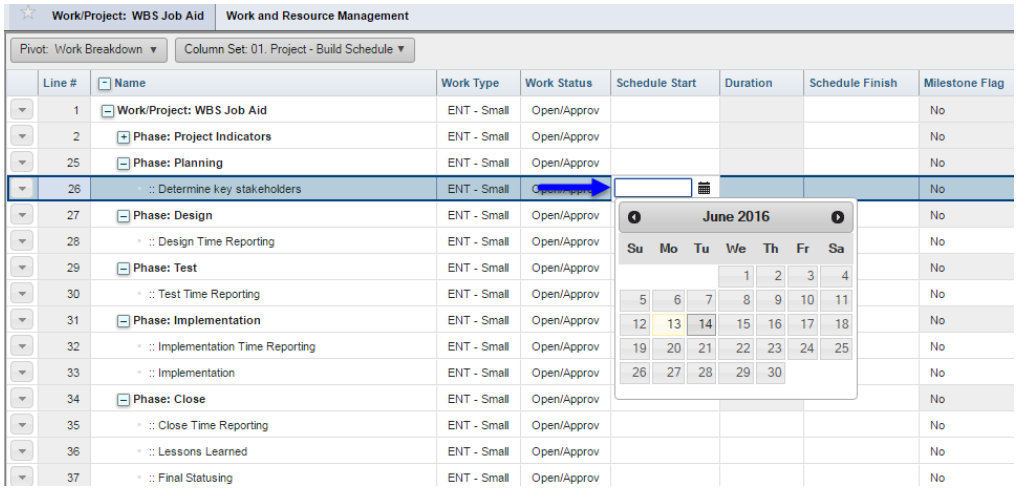
Add Tasks to the WBS

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

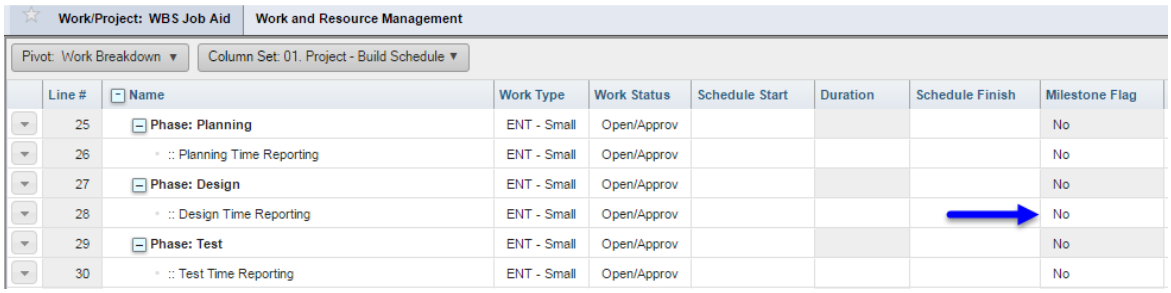


2. Double-click in each column in this task's row to update its information. For example, double-click inside **Schedule Start** to add a start date for this task.



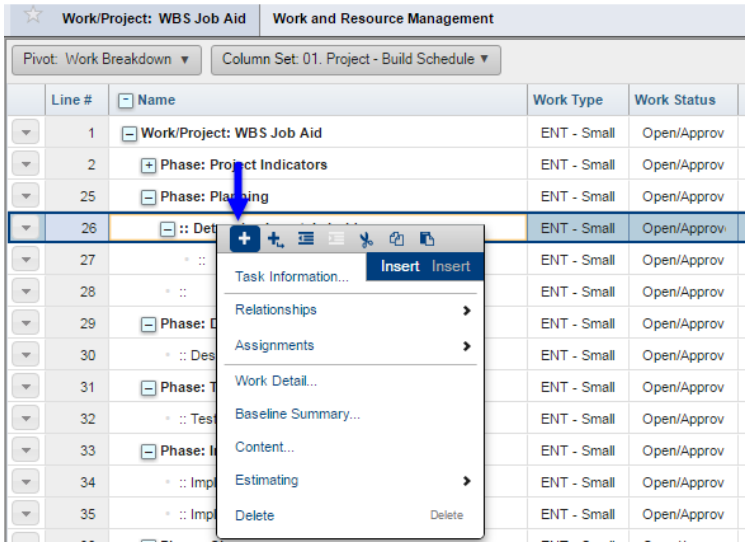
Note: You may not use every column for every task row. Keep in mind that the WBS can be edited at any time during the project lifecycle. Also remember that the project status reports pull information from the WBS, so it's important to complete as much as possible.

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.



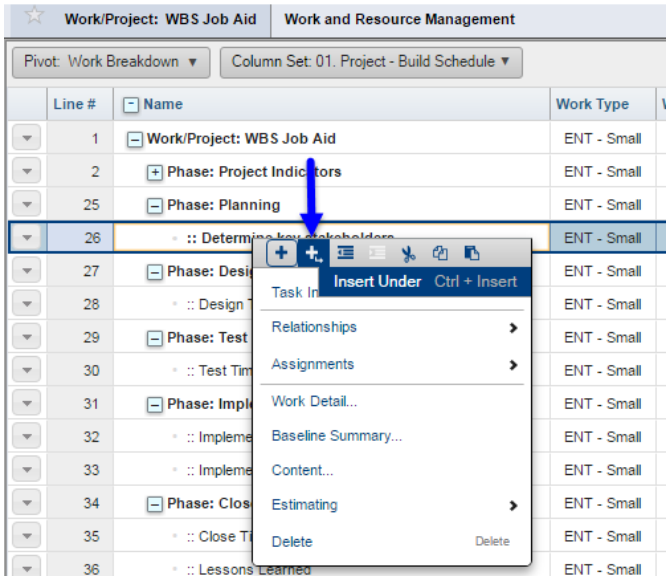
Note: Tasks with the Milestone Flag marked "Yes" appear on the Project Status Report in Planview, so it's important to note which tasks are milestones.

4. 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.



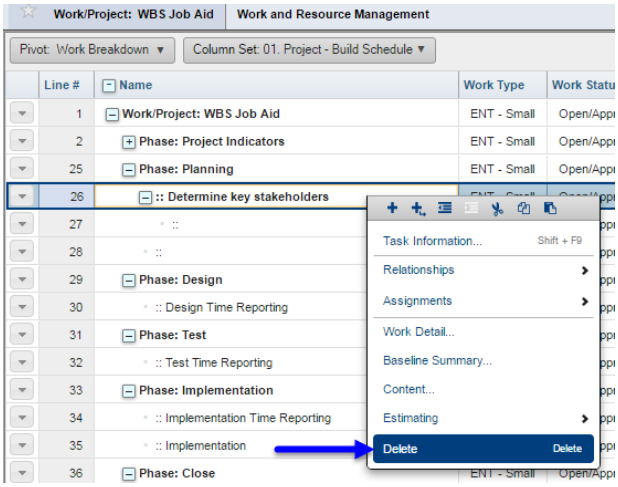
Note: The template is structured such that tasks are automatically indented under phases. You may also want to create sub-tasks (referred to as "children" in Planview), which are further indented under tasks.

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



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).

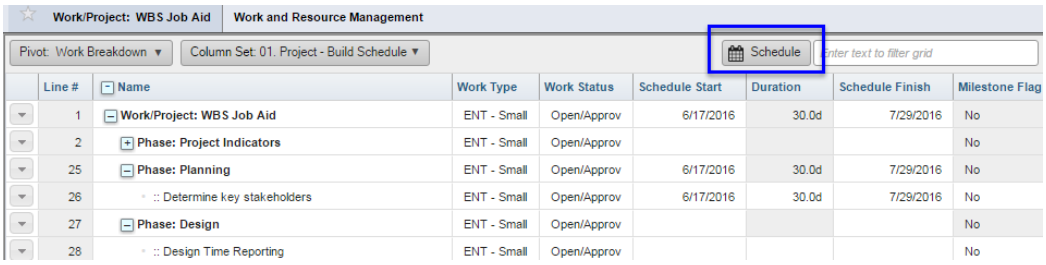
6. To delete a task or sub-task from your WBS, right click inside the corresponding row and click **Delete**.



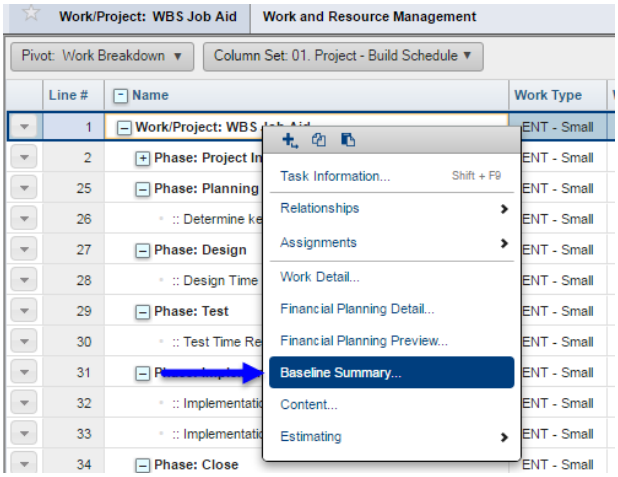
7. Repeat steps 1-6 as much as needed to fully account for all tasks and sub-tasks in your project's WBS.

Update Schedule & Create Baseline

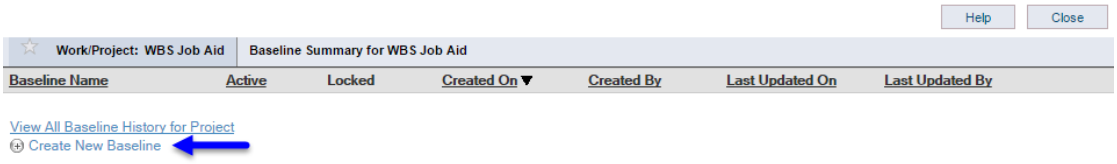
1. After you have completing adding task and schedule information to your WBS, click the **Schedule** button to generate a schedule for the full project.



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



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**.