workfront

Workfront for Plan licenses

Plan a project

Try out what you're learning as you complete the Plan a project courses, the second part of the Planner Fundamentals learning path at one.workfront.com.

To complete many of these activities, you will need access to a Workfront instance. Talk with your internal Workfront team to learn how to access Workfront.

ACTIVITY BOOKLET

rev. March 30, 2020

Activities for Plan a project

Start planning your project by making sure the task list represents the work that needs to be done for your project.

Activity #1

1. Create a new project using a template. Can you identify the main stages or phases of the project based on the parent-child task relationships? List a few of those phases.

2. You know exactly where in the project you need to add a task. What's a quick way to insert a task in a specific location?

3. You want to add a description to the task, but that field isn't visible when you look at your project plan. How can you access the description field?

4. Open your practice project to try out your task management skills.

- Change a task name using the in-line editing feature.
- Delete a task.
- Change the status of a task to Cancelled.
- Move a task from the bottom of the plan to the top.

5. What's the difference between a parent task and a child task (or a task and subtask)?

6. Add 3 tasks to the bottom of your practice project.

Now set up the second and third tasks so they're subtasks to the first task. How did you do that?

Durations establish a "window of opportunity" for work to be done. Planned hours estimate the amount of effort needed.

Activity #2

1. What does it mean when a task has a 10-day duration and 20 planned hours?

2. Create a new project using a template or open a previous practice project.

- Add 2 new tasks.
- Set the duration on each task to 2 days.
- The first task will take 1 hour to complete. The second task will take 3 hours. Set the planned hours for each task.

3. Open your practice project.

- Adjust the duration on a task. Check the completion date. How did it change?
- Adjust the planned hours on the same task. Did the completion date change? Why or why not?

Sequencing tasks in a project is best accomplished with predecessors and durations.

Activity #3

1. Create a project using a template you'll use as part of your daily work. Look at how the durations and predecessors were set up. Take about 5 minutes and make changes to the durations and predecessors, such as:

- Increase a task duration by 2 days
- Decrease a task duration by 1 day
- Delete the predecessor on a task
- Change the predecessor on a task

Keep an eye on how these changes affect the project timeline.

PRO TIP

You can quickly create predecesor relationships in your project with the Chain feature. With this, Workfront enters the predecessors automatically, based on the tasks selected. It's a quick way to set up the predecessors and establish your project timeline.

Learn about the **Chain** feature on **one.workfront.com**.

Assign tasks to an individual or a team in order for the work to get done. Job role assignments are used as placeholders.

Activity #4

1. Open your practice project or create a new project from a template. Make sure the status of your project is in Planning, so your co-workers don't get notifications about fake assignments!

- On 2 tasks, convert the job role assignments to individual users.
- On 1 task, assign the user by typing in their name.
- Use bulk edit to assign the same user to 3 of the tasks.

Task best practices

SAVE TIME WHEN PLANNING

If you made your project with a template, delete tasks from the project plan BEFORE taking the project live. This allows you to adjust the timeline and make sure everything is squared away before Workfront sends notifications to your users.

Some organizations prefer to leave the unneeded tasks in the project and mark them with a Cancelled status. This allows project managers to see which work wasn't necessary with different projects. And it means fewer timeline adjustments for you to make, especially to predecessors.

KEEP TEMPLATES CURRENT

If you find yourself always adding the same tasks to a project, talk with your Workfront team to see if the project template should be updated.

INCREASE ENGAGEMENT

The task name should clearly indicate the work that needs to be done. An easy way to do this is by starting the task name with a verb—edit, write, review, approve, build, design. This way, there's no ambiguity about what needs to be accomplished.

UPFRONT DETAIL PAYS OFF

Clear, concise, and specific task names are best. Include the information needed to convey the purpose of the task. Make sure the whole task name is descriptive—"review spring catalog first draft" or "approve product design for test run."

BE SPECIFIC

Add a description to the task to provide the assignee additional information. Include the Description field in a View so it's easy to see and edit in-line.

SHARE INFORMATION

Make sure the task contains all of the information the assignee needs to complete the work. Upload related files—creative briefs, budgets, a copy of last year's work—to the task before assigning it to the project team member. Add pertinent information to the task description or post it as an update.

ASSIGN THE WORK

Don't assign the parent tasks to someone, as these numbers are not used by the resource management tools in Workfront.

Answers

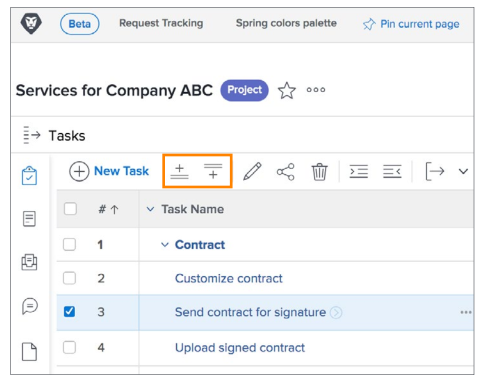
Activity #1

1. Create a new project using a template. Can you identify the main stages or phases of the project based on the parent-child task relationships? List a few of those phases.

Answers will vary based on how your organization's projects are set up.

2. You know exactly where in the project you need to add a task. What's a quick way to insert a task in a specific location?

Select a task by checking the box. Click the Insert Above and Insert Below icon. Then fill in the task information using the in-line editing functionality.



3. You want to add a description to the task, but that field isn't visible when you look at your project plan. How can you access the description field?

Select the task by checking the box, then click the Edit button.
Fill in the Description field, which is in the Overview section. Don't forget to click Save when you're done.

Make adding a Description even easier by including the Description field in a View so it's easy to see and you can use in-line editing to make updates.

4. Open your practice project to try out your task management skills.

- **Change a task name using the in-line editing feature.**
  Double-click into the task name field to activate the in-line editing and change the name. Click outside of the task fields to save your change.
- **Delete a task.**
  Select the task by checking the box. Click the Delete icon at the top of the task list. Then click through the warning message to finish the deletion.
- **Change the status of a task to Cancelled.**
  If the Status column is displayed in the selected View, click into the field to activate the in-line editing and select Cancelled from the drop-down list. Click outside of the field to save your change. You can also click the task name to open it, then change the status in the header or the task details.
- **Move a task from the bottom of the plan to the top.**
  Select the task by checking the box. Then click and drag the task to the desired location, dropping it when the blue line is where you want the task. Tip: If you hover too long over a certain area, the blue line turns into a blue box around a task. If you drop the task now, it will become a child task to the highlighted task.

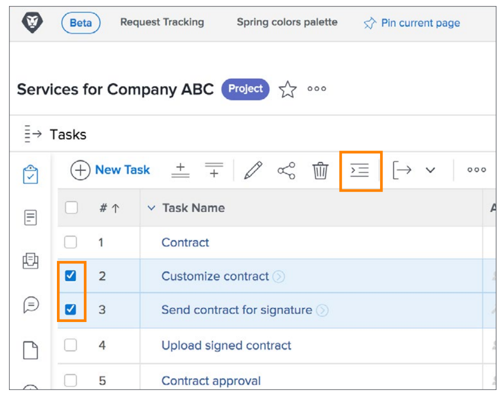
Answers (cont.)

5. What's the difference between a parent task and a child task (or a task and subtask)?

A parent task is generally an organizer, used to group a project into phases, stages, or milestones. Parent tasks usually don't represent work that needs to be done. Child tasks, or subtasks, represent the work that needs to be assigned and completed for the project to move forward.

6. Add 3 tasks to the bottom of your practice project. Now set up the second and third tasks so they're subtasks to the first task. How did you do that?

Insert the tasks using the Insert Task Above/Below option, the Add More Tasks link at the bottom, or the New Task button. Select the second and third tasks by checking their boxes. Click the indent button to move those two tasks in one level and establish the parent-child structure.



Activity #2

1. What does it mean when a task has a 10-day duration and 20 planned hours?

The project manager has planned for the work on the task to take place during a 10-day period. However, the project manager estimates the work will take only 20 hours to complete. Those 20 hours need to be completed during the 10-day duration, so the deadline can be met.

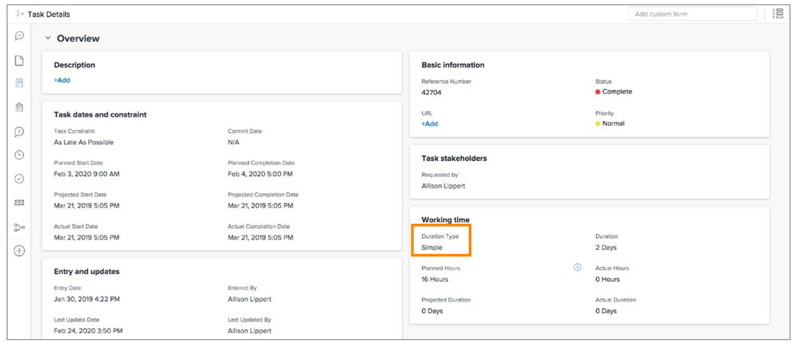
2. Create a new project using a template or open a previous practice project.

- **Add 2 new tasks.**
  Use the New Task button, Add More Tasks link, or the Insert Task Above/Below option.
- **Set the duration on each task to 2 days.**
  Double-click into the duration field of a task to activate the in-line editing. Enter 2d in the field, then click out to save the change. Repeat on the other task.
- **The first task will take 1 hour to complete. The second task will take 3 hours. Set the planned hours for each task.**
  Double-click into the planned hours field of the first task to activate the in-line editing. Enter 3h in the field, then click out to save the change. Repeat on the other task, entering 3h in the planned hours field.

Answers (cont.)

3. Open your practice project.

- **Adjust the duration on a task. Check the completion date. How did it change?**
  Double-click into the duration field of a task to activate the in-line editing. Change the duration. The completion date should have adjusted by pushing out or moving in.
- **Adjust the planned hours on the same task. Did the completion date change? Why or why not?**
  Double-click into the planned hours field of a task to activate the in-line editing. Change the planned hours. The completion date shouldn't have changed on the task. In general, planned hours don't affect the completion date of a task. If it did, then check the task duration type to see if it's set at Effort Driven or Calculated Work.



Activity #3

1. Create a project using a template you'll use as part of your daily work. Look at how the durations and predecessors were set up. Take about 5 minutes and make changes to the durations and predecessors, such as:

- **Increase a task duration by 2 days**
  Double-click into the duration field of a task to activate the in-line editing. Change the duration. The completion date of the task should increase by 2 days.
- **Decrease a task duration by 1 day**
  Double-click into the duration field of a task to activate the in-line editing. Change the duration. The completion date of the task should decrease by 1 day.
- **Delete the predecessor on a task**
  Double-click into the predecessor field to activate the in-line editing. Click the X to delete the predecessor, or hit Delete a few times. The start date of the task should change.
- **Change the predecessor on a task**
  Double-click into the predecessor field to activate the in-line editing. Click the X to delete the existing predecessor, then enter a new task number. The start date of the task should change.

Keep an eye on how these changes affect the project timeline.

Knowing how predecessors and durations work together is the key to successful project timeline planning and management.

Answers (cont.)

Activity group #4

1. Open your practice project or create a new project from a template. Make sure the status of your project is in Planning, so your co-workers don't get notifications about fake assignments!

Check the status in the project header or in the Project Details.

- **On 2 tasks, convert the job role assignments to individual users.**
  Double-click into the Assignments field to activate the in-line editing. Hover the cursor for a moment so the "smart assignments" list appears. These are users who have that job role assigned. Select a name from the list, then click outside of the field to save.
- **On 1 task, assign the user by typing in their name.**
  Double-click into the Assignments field to activate the in-line editing. Start typing the user's name and select them from the drop-down list. Click outside of the field to save the change.
- **Use bulk edit to assign the same user to 3 of the tasks.**
  Check the boxes on the 3 tasks. Click the Edit button at the top of the task list to open the Task Details window. Scroll to the Assignments section. Enter the name of the user in the field, then click the Save Changes button.