

G2 How to Break Down a Project in Tasks and Activities

Access level: Project Manager, Director, System Administrator

Learn: How to break down a project in tasks and activities.

A project can be broken down in small work units called tasks, and the tasks can be broken down in activities. Tasks and activities can have a budget, be time planned and have employees allocated, but this is not mandatory. There has to be at least one task connected to a project before it is possible to register hours on it.

When you want to create a new project's key information:

Figure 1: Main Menu -> Project Administration -> Project Tasks

- **Task No.* 1** is a unique number that accurately defines a task in different views. The column **WBS* 2** (Work Breakdown Structure) indicates the task's placement in the project plan. Task 5.1 *Implementation* is a sub task of the main task 5 *Delivery*.
- Enter a **Task Name 3**. The Task Name will be shown in the weekly- and daily timesheet and in TimeLog Tracker, and should be self explaining and intuitive.
- Enter a **Start- and an End Date 4** (If you enter 1009 TimeLog Project will auto format the date to 10-09-2008). The start- and end date is used to generate timelines and to calculate the allocated/actual work load. The start- and end date does not influence whether it is possible to register hours on a task.
- Select a **Task Type* 5**. The Task type is a grouping of tasks in main types (e.g. Design, Analysis and Documentation).
- Select whether the task should be **Active 6**. It is only possible to register hours on active tasks.
- Tick off this box when the task is a fixed price task **FP* 7**. On a fixed price task the task's budget will be equal to the customer's cost price. Please notice that a fixed price task must have an invoice date associated. The invoice date determines when the task will be billed, and can be edited by clicking [Edit].
- Enter a **Budget EUR** (mandatory on fixed price tasks) and a **Budget (h) 8**.
- Select whether the task should be placed below an existing task. Only tasks without allocation and time registrations can be converted to main tasks **9**.
- Click on **Save** in order to create the task **10**.
- Learn more about allocating projects participants in **G3**.

Figure 1: Main Menu -> Project Administration -> Project Tasks -> Edit Task

The screenshot shows the 'EDIT PROJECT' interface with a 'Project Tasks' table. The table has columns for WBS, Task no., Task, Start Date, End Date, Task Type, Active, FP, Budget, Budget, Location, Hours, Alloc., and Actual. The table contains several rows of tasks, including 'Preliminary Analysis', 'Design of Database', 'Development in .Net', 'Delivery', 'Project Management', 'Implementation', and 'Evaluation'. A 'Total' row is at the bottom. Numbered callouts 1-10 point to specific fields in the table: 1 (Task No.), 2 (WBS), 3 (Task Name), 4 (End Date), 5 (Task Type), 6 (Active checkbox), 7 (FP checkbox), 8 (Budget), 9 (Location dropdown), and 10 (Save button).

Tip: Use the tabulator key to navigate between the fields.

Tip: Fields marked with * can be hidden. Look in the System Administration.