Enterprise Architect

Task Management

Managing project resources? Allocation of people and time to tasks is vital to project progress. Sparx Systems Enterprise Architect helps you to record, monitor and manage tasks, mapping the progress of work on objects though a range of Gantt charts.

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Task Management

In the life cycle of a project, there are various non-technical tasks that are vital to the successful management and completion of the project, such as allocation of resources and allocation of time to the tasks and to meetings. Enterprise Architect helps you as a project manager or as a team member to record and monitor such tasks.

Facilities

Enterprise Architect provides a range of project management facilities as described in this table.

Facility	Description
Manage Project Resources	Resources are the people who work on a project. You can assign roles and allocate tasks to them, which helps you to track effort and estimate time to complete tasks. You can also define the effort, risks and metrics to support resource management. You add, modify and delete resources using the **Resource Allocation window**.
The Project Gantt View	In Enterprise Architect, you can visualize elements and assigned project resources

	easily in a Gantt Chart format, to review the breakdown of work for a specific project and for specific sections of the project. The Project Gantt View illustrates a project schedule by showing the start and finish dates of assigned resources, so that you as Project Manager can quickly see the current project status using the percent-complete bar shading and the percent-complete, resource name and status columns. Information can be filtered, and overdue items can quickly be highlighted and identified. You can also access specialized versions of the **Gantt View** from diagrams, Packages and the **Personal Tasks** list.
Project Task Allocation	A particular feature of the Project Gantt View is the facility to review the allocation of work to elements in the project, focusing on either the elements that require work, or the resources required to perform the work.
Review Personal Tasks	Using the **Personal Tasks** view, each team member can record, review and manage their personal work within the project.

Project Management Windows	Enterprise Architect provides five specialized tabs in the **Project Tools window** to help you to define each of the management quantities associated with an element in the model, namely: • Decisions - the choice made on a requirement of the element • Events - the action taken on a requirement of the element • Effort - the effort expended in work on the element • Risks - the risks associated with the element, and • Metrics - the metrics measured for an element

Notes

• In the Corporate, Unified and Ultimate Editions of Enterprise Architect, if User Security is enabled, you must have 'Manage Project Settings' permission to perform Resource Allocation

Project Resources

Resources are the people who work on a project. They can be assigned roles and allocated tasks, which enables tracking of effort and estimation of time to complete. You also define the effort, risks, metrics, events and decisions to support resource management.

You can also review and delete listed allocated resources using the **Resource Allocation window**.

Access

Ribbon	Construct > Resource Management > Resources
Keyboard Shortcuts	Select a Resource item on a diagram or on the 'Details' tab of the **Inspector window**, then press **Shift+Enter**

Uses

Use to

Allocate a resource to an element.
Record additional project management information for an element.
Obtain a report of resource allocation details.
Show Project Management information on elements in a diagram.
Configure Project Management data and populate the drop-down lists used on the tabs of the **Project Tools window**.

Notes

- In the Corporate, Unified and Ultimate Editions of Enterprise Architect, if User Security is enabled, you must have 'Manage Project Settings' permission to perform Resource Allocation and to update and manage project resources, effort, metrics, risks, decisions and events

Resource Allocation

In developing a model, people (or resources) in a number of roles might perform tasks on model structures. As a Project Manager, you can assign resources to tasks on elements (including Packages) in the model, planning and monitoring the work that they do within the timeframe you have allocated for that work to be completed. You can do this using the Project Gantt View and/or Construct facilities.

If you want to assign more than one resource to the role or task on the element, work through the procedure in the *Assign Multiple Resources* Help topic.

Access

First, select an element, then:

Ribbon	Construct > Resource Management > Resources : right-click | Add New
	Construct > Resource Management > Gantt > Element View > Right-click on element | Assign Resource
Keyboard Shortcuts	Select a Resource item on a diagram or on the 'Details' tab of the **Inspector window**, then press **Shift+Enter**

Enter resource allocation details for an element

Field	Action
Resource	Either: • Type in the name of the resource being assigned to work associated with the element, or • Click on the **drop-down arrow** and click on the name of the resource
Role or Task	Either: • Type in the role name or task performed by the selected resource, or • Click on the **drop-down arrow** and click on the role to be performed by the resource
Start Date	This field defaults to today's date. If you want to assign a different start date for the task: 1. Click on the **drop-down arrow**. 2. If necessary, click on the Left or Right Arrow to select the previous or next

	month.
	3. Click on the appropriate day of the month as the start date.
	The field immediately changes to the selected date.
End Date	This field defaults to today's date.
	If you want to assign a different end date for the task:
	1. Click on the **drop-down arrow**.
	2. If necessary, click on the Right Arrow to select the next month.
	3. Click on the appropriate day of the month as the end date.
	The field immediately changes to the selected date.
Milestone	This checkbox and drop-down list allow linking the end date to the date of a Milestone element that is no more than seven days old. (Milestone elements form part of the structures developed using the MDG Technology for CMMN, the Case Management Model & Notation, which you can access through the Analysis Perspective.)
Complete %	If the task is already in progress, type in

	the current percentage completion.
Expected Time	Type in the number of whole time units the task is expected to take. (The value must be an integer, so you cannot record part units.)

The unit of time you adopt is by agreement within the project, and depends on the granularity of the work being recorded. Most tasks are completed in a number of hours or a number of days; use the smallest practical unit that you can record as a whole number.

Apply the same units as used for the 'Allocated Time' and 'Time Expended' fields. |
| Allocated Time | Type in the number of time units the task can be spread over. (The value must be an integer, so you cannot record part units.)

The unit of time you adopt is by agreement within the project, and depends on the granularity of the work being recorded. Most tasks are completed in a number of hours or a number of days; use the smallest practical unit that you can record as a whole number.

Apply the same units as used for the |

	'Expected Time' and 'Time Expended' fields.
Time Expended	(When the task is eventually 100% complete, you will type in the number of time units it actually took. The value must be an integer, so you cannot record part units.) The unit of time you adopt is by agreement within the project, and depends on the granularity of the work being recorded. Most tasks are completed in a number of hours or a number of days; use the smallest practical unit that you can record as a whole number. Apply the same units as used for the 'Expected Time' and 'Allocated Time' fields.
Description	Type (and, if you prefer, format) a description of the work being done by the resource.
History	(As the task progresses, you add text to this tab to record the activities, progress, problems and outcomes of the task.)
Apply	Click on this button to apply the changes to the currently-displayed element on a

	diagram, without closing the dialog.
New	Click on this button to clear the fields on the dialog so that you can define a new resource allocation.
Previous	Click on this button to display the previous resource record in the sequence.
Next	Click on this button to display the next resource record in the sequence.
OK	Click on this icon to save the data you have entered and to add the entry to the 'Resource' list in the Project Gantt View, 'Details' tab of the **Inspector window** and **Resource Allocation window**, and then close the dialog.
Close	Click on this button to discard the data you have entered, and close the dialog.
Help	Click on the icon to display this Help topic.

Notes

- In the Corporate, Unified and Ultimate Editions of Enterprise Architect, if User Security is enabled, you must have 'Manage Project Settings' permission to perform Resource Allocation

- If you allocate resources to Use Cases, the information you enter contributes to the Use Case Estimation calculation for estimating the project size in terms of time, resources and cost

- To edit existing Resource Allocation items for this element, display the allocation in the 'Assigned Resources' dialog by either:
  - Clicking on the 'Construct > Resource Management > Resources' ribbon option, right-clicking on the required item in the Resource
  Allocation window and selecting the 'Modify Selected' option
  - Double-clicking on the item in the *Resources* list in the 'Details' tab of the **Inspector window**   or
  - Clicking on the item in the Element View of the **Project Gantt Chart**

- To delete existing Resource Allocation items for an element, click on the item in the **Resource Allocation window** and click on ✖ in the window toolbar

Assign Multiple Resources

When you have a large unit of work associated with an element - such as a Package element - you might want to assign several resources to that element to perform that unit of work. You can assign each person individually, but if the resources have the same role or task you can assign all of them together in one operation, using the 'Assigned Resources' dialog.

Access

First, select an element, then:

Ribbon	Construct > Resource Management > Gantt > Element View > right-click on element > Assign Resource

Assign multiple resources to an element

Option	Action
Resource	(To assign a single resource, simply type in the name or click on the **drop-down**

	arrow and select the name from the list. In Project Management, it is simpler to assign single resources directly through the **Resource Allocation window**.) For multiple resources, on the Assigned Resources dialog, click on the ⬚ button on the 'Resource' field to display the 'Assign Resource' dialog. 1. Select the checkbox against each resource to assign to the element; to select all resources listed, click on the **Select All** button. 2. Click on the **OK button** to close the dialog and to add the selected resources to the 'Resource' field. The 'Resource' field now shows the selected resources, but grayed out. The drop-down arrow also is not active. To change the resources in the field, click on the ⬚ button again and select/clear the appropriate checkboxes.
Role or Task	Either: • Type in the role name or task that is common to all the selected resources, or • Click on the **drop-down arrow** and click on the role that is common to all

	the resources
Start Date	This field defaults to today's date. If you want to assign a different start date for the task: 1. Click on the **drop-down arrow**. 2. If necessary, click on the Left or Right Arrow to select the previous or next month. 3. Click on the appropriate day of the month as the start date. The field immediately changes to the selected date.
End Date	This field defaults to today's date. If you want to assign a different end date for the task: 1. Click on the **drop-down arrow**. 2. If necessary, click on the Right Arrow to select the next month. 3. Click on the appropriate day of the month as the end date. The field immediately changes to the selected date.
Complete %	If the task is already in progress, type in the current percentage completion.

Expected Time	Type in the number of time units the task is expected to take. (The value must be an integer, so you cannot record part units.)
	The unit of time you adopt is by agreement within the project, and depends on the granularity of the work being recorded. Most tasks are completed in a number of hours or a number of days; use the smallest practical unit that you can record as a whole number.
	Apply the same units as used for the 'Allocated Time' and 'Time Expended' fields.
Allocated Time	Type in the number of time units the task can be spread over. (The value must be an integer, so you cannot record part units.)
	The unit of time you adopt is by agreement within the project, and depends on the granularity of the work being recorded. Most tasks are completed in a number of hours or a number of days; use the smallest practical unit that you can record as a whole number.
	Apply the same units as used for the 'Expected Time' and 'Time Expended' fields.

Time Expended	(When the task is eventually 100% complete, you will type in the number of time units it actually took. The value must be an integer, so you cannot record part units.)
	The unit of time you adopt is by agreement within the project, and depends on the granularity of the work being recorded. Most tasks are completed in a number of hours or a number of days; use the smallest practical unit that you can record as a whole number.
	Apply the same units as used for the 'Expected Time' and 'Allocated Time' fields.
Description	Type (and, if you prefer, format) a description of the work being done by the resources.
History	(As the task progresses, you add text to this tab to record the activities, progress, problems and outcomes of the task.
Apply	Click on this button to apply the changes to the currently-displayed element on a diagram, without closing the dialog.
New	Click on this button to clear the fields on

	the dialog so that you can define a new resource allocation.
Previous	Click on this button to display the previous resource record in the sequence.
Next	Click on this button to display the next resource record in the sequence.
OK	Click on this button to save the data you have entered, and close the dialog.
Close	Click on this button to discard the data you have entered, and close the dialog.
Help	Click on this button to display this Help topic.

Notes

- When the resource details are displayed on the **Project Gantt Chart** or **Resource Allocation window**, each resource has their own record containing, initially, the same data; however, each resource can be monitored and their progress recorded separately
- If you assign resources that are already in a multiple

resource assignment to the selected element, a prompt displays for you to confirm that you are updating the assignment of that resource, or now omitting that resource from the existing assignment

Effort Management

In Enterprise Architect, the Project Manager can allocate effort (as time) to work on a given model element. To select the element to which to allocate effort, click on the required element in the **Browser window** or a diagram.

Access

Ribbon	Construct > Project Management > Effort : right-click | Add New
Keyboard Shortcuts	Select an Effort item on a diagram or on the 'Details' tab of the **Inspector window**, then press **Shift+Enter**

Enter effort allocation details for an element

Effort	Type the name or a brief description of the effort.
Type	

	Type in the effort type or click on the **drop-down arrow** and select the type. The selection list is drawn from the global Effort Type list, but any new efforts you type in this field are not added to the list.
Time	Type in the amount of time the effort is expected to expend.
Notes	Type in any additional notes or description of this effort.
OK	Click on this icon to save the data you have entered and to add the entry to the 'Effort' list in the **Effort window** and the 'Details' tab of the **Inspector window**, and close the dialog.
Cancel	Click on this button to discard the data you have entered, and close the dialog.

Notes

- To edit existing Effort items for this element, display the record in the **Project Tools window** by either:

- Clicking on the 'Construct > Project Management > Effort' ribbon option and on the required item in the 'Effort' tab of the window, or

- Double-clicking on the item in the *Project > Effort* list in the 'Details' tab of the **Inspector window**

- To delete existing Effort items for an element, right-click on the item in the 'Effort' tab of the Project Tools window and click on the 'Delete' option

- Although Enterprise Architect does not currently provide detailed reports on effort within a model, you can use the **Automation Interface** or similar tools to create your own custom reports based on effort information you enter

Risk Management

In Enterprise Architect, the Project Manager can allocate the possible weighting of defined risks that might impact work on a given model element.

To select the element to which to allocate risk weightings, click on that element in the **Browser window** or a diagram.

Access

Ribbon	Construct > Project Management > Risks: right-click | Add New
Keyboard shortcut	Select a risk item on a diagram or Element tab of the browser then use **Shift+Enter**

Enter risk details for an element

Risk	Type the name or a brief description of the risk.

Type	Type in the risk type or click on the **drop-down arrow** and select the type.
	The selection list is drawn from the global Risk Type list, but any new risks you type in this field are not added to the list. If there are no global risk types defined, the drop-down arrow is not displayed.
Weight	Defaults to the weighting for the defined type. You can change this weighting if necessary.
Notes	Type in any additional notes or description of this risk. You can use the Notes Toolbar at the top of the field to format the text, if you prefer.
OK	Click on this icon to save the data you have entered and to add the entry to the Risk list in the **Risk window** and the 'Details' tab of the **Inspector window**, and close the dialog.
Cancel	Click on this button to discard the data you have entered, and close the dialog.

Notes

- The risks described here are not the same as those represented by Risk elements; the risks are properties of a single element, whilst the Risk element represents something that can impact a range of other elements

- If you select a global risk type from the 'Type' drop-down list and the associated 'Weight' field is empty, the default Weight value is allocated to the 'Weight' field on the 'Risks' tab

- To edit existing Risk items for this element, display the record in the 'Risks' dialog by either:
    - Clicking on the 'Construct > Project Management > Risks' ribbon option and on the required item in the 'Risks' tab of the **Project Tools window**, or
    - Double-clicking on the item in the *Project > Risk* list in the 'Details' tab of the **Inspector window**

- To delete existing Risk items for an element, right-click on the item in the 'Risk' tab of the Project Tools window and click on the 'Delete' option

- Although Enterprise Architect does not currently provide detailed reports on risks within a model, you can use the **Automation Interface** or similar tools to create your own custom reports based on risk information you enter

Metrics

The Project Manager can allocate the possible weighting of defined metrics to work on a given model element.

To select the element to which to allocate a metric weighting, click on the required element in the **Browser window**.

Access

Ribbon	Construct > Project Management > Metrics : right-click | Add New
Keyboard shortcut	Select a metric item on a diagram or the 'Details' tab of the **Inspector window**, and press **Shift+Enter**

Enter metric details for an element

Field/Icon	Description
Metric	Type the name or a brief description of the metric.

Type	Type in the metric type or click on the **drop-down arrow** and select the type. The selection list is drawn from the global Metric Type list, but any new metrics you type in this field are not added to the list. If there are no global metric types defined, the drop-down arrow is not displayed.
Weight	Defaults to the weighting for the defined type. You can change this weighting if necessary.
Notes	Type in any additional notes or description of this metric. You can use the Notes Toolbar at the top of the field to format the text, if you prefer.
OK	Click on this button to save the data you have entered and to add the entry to the 'Metrics' list in the **Metrics window** and the 'Details' tab of the **Inspector window**, and close the dialog.
Cancel	Click on this button to discard the data you have entered, and close the dialog.

Notes

- If you select a global metric type from the 'Type' drop-down list and the associated 'Weight' field is empty, you can allocate the default Weight value in the 'Weight' field in the 'Metrics' dialog

- To edit existing Metric items for this element, display the record in the 'Metrics' dialog by either:
     - Clicking on the 'Construct > Project Management > Metric' ribbon option and on the required item in the **Project Tools window**, or
     - Double-clicking on the item in the *Project > Metrics* list in the 'Details' tab of the **Inspector window**

- To delete existing Metric items for an element, right-click on the item in the Project Tools window or the 'Details' tab and select the 'Delete' option

- Although Enterprise Architect does not currently provide detailed reports on metrics within a model, you can use the **Automation Interface** or similar tools to create your own custom reports based on metric information you enter

Show Project Items in a Diagram

When you have created a Project item (Decision, Event, Effort, Risk, Metric), it is useful to make the record visible on its parent element. You can do this by displaying the record within a 'Project' compartment on the element as it displays in a diagram. Any element that is capable of displaying a compartment, and that has Project items assigned to it, can show the items in a diagram.

Note that:

- An Event records the action taken for the current model element
- A Decision records the choice taken for the current model element

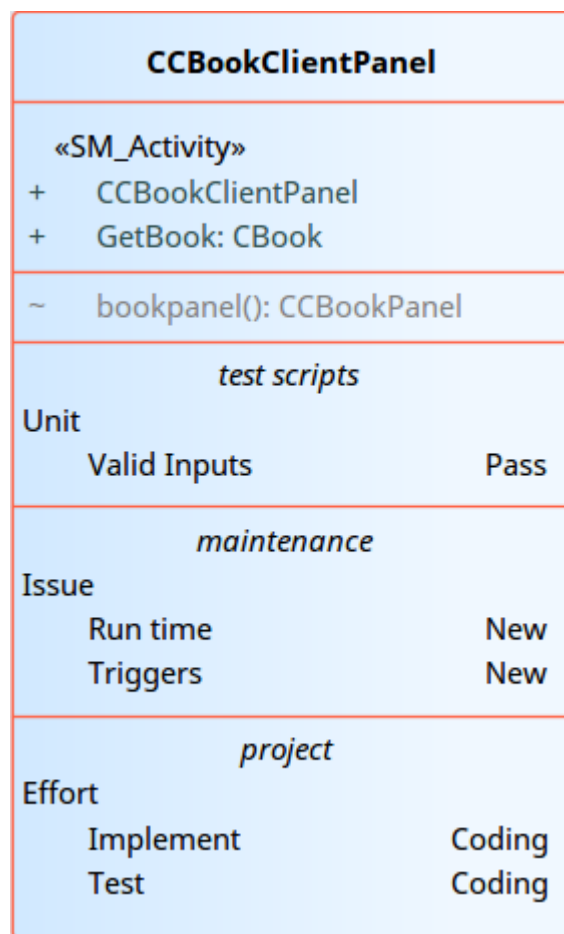## Show Project Items in Project Compartment

Step	Action
1	Open a diagram containing the element for which Project Items exist.
2	Double-click on the diagram background to display the diagram properties dialog. Click on the 'Elements' tab.
3	In the 'Show Compartments' panel, click

	on the 'Project' checkbox.
4	Click on the **OK button**.
	Each Project Item now appears in the *Project* compartment of the element on the diagram. Items of each type are grouped together so that, for example, all Effort items on the element are grouped under the heading 'Effort', and all Risk items on the element are grouped under the heading 'Risk'.

CCBookClientPanel

«SM_Activity»
+   CCBookClientPanel
+   GetBook: CBook

~   bookpanel(): CCBookPanel

test scripts
Unit
    Valid Inputs   Pass

maintenance
Issue
    Run time   New
    Triggers   New

project
Effort
    Implement   Coding
    Test   Coding

Effort Types

When setting up the project management parameters for monitoring work on elements, you can create types of effort to add to the global list of effort types that can be assigned to any element in the model. You can also select and edit existing effort types. The global list of effort types displays in the 'Type' drop-down list on the 'Effort' page of the **Project Indicators window**.

Access

Open the 'Project Indicators' dialog using one of the methods outlined here, then select the 'Effort' tab.

Ribbon	Configure > Reference Data > Model Types > Project Indicators : Effort
Keyboard shortcut	Select an Effort item on a diagram or the 'Details' tab of the **Inspector window**, then press **Shift+Enter**

Add a new effort type to the global list

Click the 'New' button to define a new Effort type

Option	Action
Effort	Type the name of the effort type. (Or, to edit an existing effort type, click on the effort name in the Defined Effort Types panel.)
Description	Type a short description of the effort type.
Weight	Type the default weighting to apply to the effort type.
<note>	Type any additional information on the effort type.
Save	Click on this button to save the changes that you have made to the dialog.
New	Click on this button to clear the data fields ready to define a new effort type.
Delete	Click on an entry in the Defined Effort Types panel, and click on this button to immediately delete the effort type.
Close	Click on this button to close the 'Project Indicators' dialog. If you have not saved your changes, the system prompts you to

	save or abort those changes.

Notes

- Although Enterprise Architect does not currently provide detailed reports on effort within a model, you can use the **Automation Interface** or similar tools to create your own custom reports based on effort information you enter

- You can transport effort types between models, using the 'Configure > Model > Transfer > Export Reference Data' and 'Import Reference Data' ribbon options

Metric Types

Enterprise Architect enables you to add a metric type to the global list of metric types that can be assigned to any element in the model. The global list of metric types displays in the 'Type' field drop-down list on the **Metrics window**.

Access

Open the 'Project Indicators' dialog using one of the methods outlined here, then select the 'Metric' tab.

Ribbon	Configure > Reference Data > Model Types > Project Indicators : Metric

Add a new metric type to the global list

Click the 'New' button to define a new Metric

Option	Action
Metric Type	Type the name of the metric type. (Or, to edit an existing metric type, click on the metric name in the Defined Metrics

	panel.)
Description	Type a short description of the metric type.
Weight	Type the default weighting to apply to the metric type.
<note>	Type any additional information on the metric type.
Save	Click on this button to save the changes that you have made to the dialog.
New	Click on this button to clear the data fields ready to define a new metric type.
Delete	Click on an entry in the Defined Metrics panel, and click on this button to immediately delete the metric type.
Close	Click on this button to close the 'Project Indicators' dialog. If you have not saved your changes, the system prompts you to save or abort those changes.

Notes

- Although Enterprise Architect does not currently provide detailed reports on metrics within a model, you can use the **Automation Interface** or similar tools to create your own custom reports based on metric information you enter

- You can transport metric types between models, using the 'Configure > Model > Transfer > Export Reference Data' and 'Import Reference Data' ribbon options

Risk Types

Using Enterprise Architect you can add a risk type to the global list of risk types that can be assigned to any element in the model. The global list of risk types displays in the 'Type' field drop-down list on the 'Risks' page of the **Project Indicators window**.

Access

Open the **Project Indicators window** using one of the methods outlined here, then select the 'Risk' page.

Ribbon	Configure > Reference Data > Model Types > Project Indicators : Risk

Add a new risk type to the global list

Click on the **New button** to define a new Risk

Option	Action
Risk Type	Type the name of the risk type. (Or, to edit an existing risk type, click on the risk name in the 'Defined Risks' panel.)

Description	Type a short description of the risk type.
Weight	Type the default weighting to apply to the risk type.
<note>	Type any additional information on the risk type.
Save	Click on this button to save the changes that you have made to the dialog.
New	Click on this button to clear the data fields ready to define a new risk type.
Delete	Click on an entry in the 'Defined Risks' panel, and click on this button to immediately delete the risk type.
Close	Click on this button to close the 'Project Indicators' dialog. If you have not saved your changes, the system prompts you to save or abort those changes.

Notes

- Although Enterprise Architect does not currently provide detailed reports on risks within a model, you can use the **Automation Interface** or similar tools to create your own custom reports based on risk information you enter
- You can transport risk types between models, using the 'Configure > Model > Transfer > Export Reference Data' and 'Import Reference Data' ribbon options

Project Task Allocation

Using the Project Gantt View, you can review the allocation of work to elements in the project, focusing on either the elements that require work, or the resources required to perform the work. The view primarily shows information that is entered through other windows and dialogs, but once a record exists in the view you can edit it and, for example, add to or change the resources on an element.

Access

Ribbon	Construct > Resource Management > Gantt

The Project Gantt View

In Enterprise Architect, you can visualize elements and assigned project resources in a Gantt Chart format, to review the breakdown of work for a specific project and for specific sections of the project. The Project Gantt View illustrates a project schedule by showing the start and finish dates of assigned resources, so that a Project Manager can quickly see the current project status using the percent-complete bar shading and the percent-complete, resource name and status columns. Information can be filtered, and overdue items can quickly be highlighted and identified.

You can also access specialized versions of the **Gantt View** from diagrams, Packages and the **Personal Tasks** list.

Access

Ribbon	Construct > Resource Management > Gantt

Gantt View

This example shows four resources, two of whom are working in different capacities on one task, and two on

another task. The resource names and roles are listed in the left panel of the chart, together with the actual percentage completion of each person's work on the task. In the right panel of the chart, completed work is indicated by the green section of the bar, work yet to be completed but not yet due is indicated in blue, and work not completed and overdue is indicated in red (as a result of the option to highlight overdue work being applied).
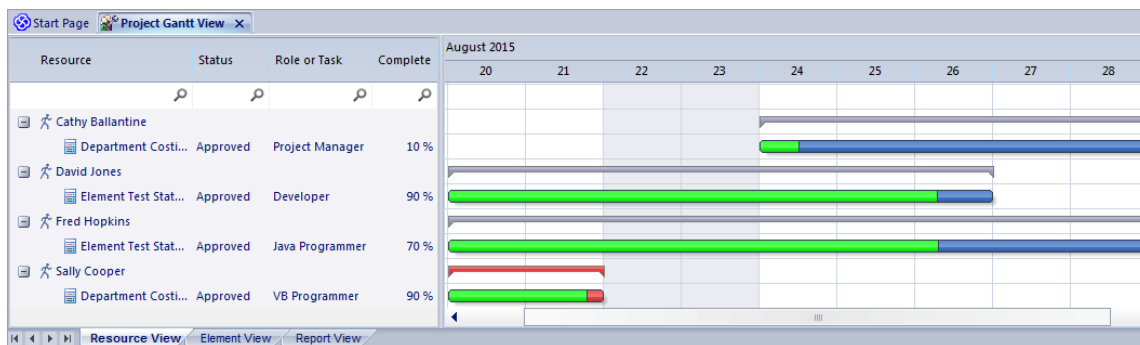
Tabs of the Gantt View

The Project Gantt View has three tabs, the first two of which use the Gantt chart itself to show the progress of work against the resources performing the work or the elements having the work performed on them. (Other variations of the Gantt chart do not have these separate tabs.)

View	Detail
Resource View	When you initially open the **Gantt View**, it defaults to the 'Resource View' tab, in which the focus is on the current commitments of each allocated resource

	in the project.
Element View	The Element View lists the elements in the project that have resources assigned to them, and the resources assigned to each element.
Report View	A Resource report shows how your resources are deployed in your project, displaying a list of all elements that have resources allocated to them.

Gantt View Facilities

The facilities of the Project Gantt View are common to the Resource and Element Views, and in some cases to all three tabs, as described here.

Option	Action
Display tasks for today only, or for another day only	Right-click on the display and select the option: • 'Show Only Active Tasks for Today' - to show only tasks that are in progress today • 'Show Only Active Tasks for Other Day' - to show only tasks that were in

	progress on a specific day in the past, or that are scheduled to be in progress on a day in the future; a calendar dialog displays from which you select the day to examine
Display the properties of the element to which a resource is assigned	Right-click on the element entry and select the 'Show Element Properties' option. The 'Properties' dialog for the element displays.
Display the Resource Allocation details for an element or resource	Right-click on the entry and select the 'Show Task Properties' option. The 'Assigned Resources' dialog displays; you can edit the details and, if necessary, change the resource allocated to the element.
Display the Resource Allocation records for an element	(Also available in the **Report View**.) Right-click on the entry and select either of the context menu options: • 'Show Element **Resource Allocation window**' (if the window is closed or hidden) • 'Find Task in Element Resource Allocation window' (if the window is visible but showing the details of

	another element)
	The Resource Allocation window displays, with the details of the selected entry shown in the fields and the other resource allocations for the element listed in the left-hand panel.
	You can edit the details and, if necessary, change the resource allocated to the element.
Assign a new resource to an element	Right-click on an element in the display, and select the 'Assign Resource' option.
	The 'Assigned Resources' dialog displays; complete this as for the **Resource Allocation window**.
Change the scale of the display	By default, the Gantt Chart shows periods of time in units of days of the month, each date column being approximately one centimetre wide. Weekends have a darker fill color.
	You can change the scale of the date columns by clicking on the column header, pressing **Ctrl** and rolling the mouse wheel. As you do this:
	• At one extreme the date columns expand to approximately 2.5 centimetres, and the date header shows the full date in dd/mm/yyyy format

	• Rolling to the other extreme changes the scale of the column from date through week, labeled month, numbered month and labeled year to numbered segments of a decade This allows you to represent a wide range of tasks on a single chart and to condense or expand the view - in conjunction with filters - to investigate the short term and longer term work clearly.
Change the duration of a task, on the Gantt Chart	You might want to make broad adjustments to the timeline of an event, which you can easily do on the Gantt Chart itself. For example, the resource is ill, or another resource has taken over other tasks that the resource was allocated to. In neither case has the task itself changed, but in the first case the resource needs a longer elapsed time in which to complete the task, and in the second they have less other work to do and can finish the task sooner. To make these adjustments, you simply drag the right end of the time bar further or back along the chart. This changes the task end date to wherever you drag the time line to, and adjusts the division into complete and incomplete/overdue work

	to maintain the percentage completion value. The work time allocated to the task does not change.
	If you drag the left end of the time line, this moves the whole line without changing its length or proportions; you are just indicating that the task started earlier or later and will finish earlier or later by the same amount of time.
Grouped work	A resource is likely to be allocated to several tasks either simultaneously or consecutively. In the Resource View the tasks assigned to a resource are grouped under the resource name, and a narrow group bar displays in gray on the chart against the name, spanning the period from when work is scheduled to begin on the first task to when work is scheduled to finish on the final task.
	Similarly, a body of work, represented by an element, might involve several resources starting and finishing at different points. The resources are grouped under the element name and the group bar displays on the chart against the element name, spanning the period from when the first resource is scheduled to start work to when the last resource is

	scheduled to complete work on the task.
	If any adjustments are made that impact the initial start point or final completion point of the work, the end of the group bar automatically adjusts. If any task or resource in the group is overdue, the group bar turns red to reflect that there is a potential problem in the allocated work.
Filter the display to exclude elements by status	(This feature takes effect under your user ID.)
	Right-click on the window and select the 'Apply Element Status **Filter**' option.
	The 'Excluded Status Types' dialog displays; select the checkbox against one or more statuses to exclude elements having those statuses from the list.
	You can select every checkbox at once by clicking on the **Select All** button, and clear all selections by clicking on the **Clear All button**.
	Click on the **OK button** to immediately apply the filter, which stays in effect until you specifically change it.
Filter the display to include elements	Right-click on the list and select the 'Show **Filter** Bar' option.
	The Filter Bar displays underneath the heading bar. Type a text string in the field

having certain properties	above a column to immediately filter the list for entries that have the text string in the values in that column.
	To delete a filter string altogether, click on the blue cross at the right of the field.
	If you no longer want to use the filter bar, right-click on the list and select the 'Hide Filter Bar' option.
Filter the display by Start or Completion date	The display default is to show current tasks for which the end date has not yet occurred. Right-click on the list and select one of the options:
	• 'Include Completed Tasks Within the Last ...' - to display incomplete tasks and tasks completed only within the specified period; you can set this period to 7, 30 or 90 days, or you can include all completed tasks, or hide all completed tasks
	• 'Include Future Tasks Starting in ...' - to display current incomplete tasks and completed tasks (depending on the setting of the 'Include Completed Tasks Within the Last ...' option) and future tasks that have been recorded and are due to start within the next period; you can set this period to 7, 30 or 90 days, or you can show all tasks that have

	been recorded but are not yet due to start
Identify overdue tasks	Right-click on the display and select the 'Display Highlight For Overdue items' option and one of its sub-options: • 'Show in Red' - to display the uncompleted percentage of the task bars for overdue items on the Gantt chart in red • 'Show in Red to Current Date' - to extend the task bars of the overdue items to today's date, and display them in red • 'None' - to cancel any overdue item highlighting that has been set
Display ONLY overdue tasks	Right-click on the display and select the 'Show Overdue Items Only' option. The display shows only those items for which the end date has passed but that are not 100% complete. These items do not have red highlighting.
Refresh the report	Right-click on the entry and select the 'Refresh' option. The content of the display is refreshed and collapsed to element or resource

	level.
Reposition the Gantt chart to automatically show the end date of a selected allocation	Right-click on the display and select the 'Go to | Auto Sync with Task End Date' option. Whilst this option is selected (with a tick next to it), whenever you click on an allocation the display adjusts to show the end date of the task in the center of the chart.
Reposition the Gantt chart to show the start date or end date of an allocation, or today's date	Right-click on the entry and select the required option: • Go To | Task Start Date • Go To | Task End Date • Go To | Today's Date The display shifts to put the required date in the center of the chart.
Locate the element in the Browser window	(Also available in the **Report View**.) Right-click on the element name and select the 'Find in Project Browser' option. The area of the **Browser window** containing the element is brought into focus and expanded, and the element is highlighted.

Send a Model Mail to the resource	It is possible to send a **Model Mail** directly from the Project Gantt View to a selected resource if the resource's Author name matches their:
	• Enterprise Architect security user ID (Security has been enabled) or
	• Their workstation login ID (Security has not been enabled)
	Right-click on the resource or one of their activities and select the 'Post Model Message' option. This opens a Model Mail message addressed to the resource, for you to complete and send.
Save an image of the Gantt chart to file	Right-click on the tab and select the 'Save Image to File' option. The 'Save As Image' dialog displays, on which you specify the file name, location and graphics file type to save to.
Save an image of the Gantt chart to the clipboard	Right-click on the tab and select the 'Copy Image to Clipboard' option. You can paste the image from the clipboard into your preferred graphics package.

Notes

- Items in the list pane can be filtered; right-click on the column headings in the list pane to toggle the **Filter** Bar between hidden or shown, or to edit the filter

Resource View

The 'Resource View' tab shows the current commitments of each allocated resource in the project as a list of allocation records and a Gantt chart of the progress of the allocations.

The display initially shows the resources and their overall commitment; click on the 'plus-box' to the left of the name of the resource to expand the entry to show the elements and the allocation period for each element.

The display shows both complete allocations and those that are still in progress; an internal filter hides completed allocations two weeks after the end date, and incomplete allocations one month after the end date. Tasks you can perform include checking the:

- Dates on which specific resources or all resources are currently allocated
- Elements to which each resource is allocated
- Dates on which a resource is allocated to work on a specific element
- General progress of the resource in completing the work
- Specific details of the allocation of a resource to an element and task or role

Access

Ribbon	Construct > Resource Management > Gantt : Select the 'Resource View' tab

Element View

The 'Element View' tab of the Project Gantt View lists the elements in the project that have resources assigned to them. It shows the resources assigned to each element as a list of allocation records and as a Gantt chart of the progress of the allocations. An allocation can be partial, in that a role or task is assigned but no specific resource has been identified.

The display initially shows the elements and their overall resource commitment; click on the 'plus-box' to the left of the name of the element to expand the entry to show the resources and the allocation period for each resource. You can then:

- Check the dates on which specific elements have resources currently allocated

- Check which resources are currently allocated to an element

- Assign further resources to the element

- Check the dates on which a resource is allocated to work on a specific element

- Check the general progress of the resource in completing the work

- Check the specific details of the allocation of a resource to an element and task or role

The display shows both complete allocations and those that are still in progress; an internal filter hides completed allocations two weeks after the end date.

The 'Element View' complements the 'Resource View' and '**Personal Tasks** View' of work allocation on the project.

Access

Ribbon	Construct > Resource Management > Gantt or Design > Diagram > View As > **Gantt View**
Context Menu	**Browser window** | right-click on an open diagram | Switch View | Switch to **Gantt View** In diagram, right-click on background | Switch View | Switch to Gantt View Browser window | Right-click on Package | Open Package in | Gantt View

Report View

The **Report View** shows how your resources are deployed in your project, displaying:

- A list of all elements that have resources allocated to them, and the type of each element

- The resource allocated, and the role played by that resource

- The start and end dates of the allocation

- The time allocated, expected and expended

- The percentage completion of the allocation

You can tailor the displayed information by:

- Hiding columns of information

- Grouping types of information

- Filtering the data by status

- Filtering the data by start date or end date

- Filtering any column to show only a specific value

Having displayed the information you require, you can print it.

Access

Ribbon	Construct > Resource Management > Gantt : Select the **'Report View'** tab

Report View Options

Option	Action
Run the report	Click on the first icon in the **Report View** toolbar (the rotating arrows). The report results display. If you have the report open for a while, you can update the information; either: • Run the report again or • Right-click on the content and select the 'Refresh' option
Adjust column headings	Drag and drop column headings into the sequence you require. Right-click on the column headings and select the 'Field Chooser' option, to add or remove columns using the 'Field Chooser' dialog.
Group entries by column heading	Right-click on the column headings and select the 'Enable Group Box' option, to cluster the report information according to your preferred hierarchy of column

	headings.
Filter columns	Either: • Click on the third toolbar icon from the right (the spy glass), or • Right-click on the column headings and select the 'Toggle **Filter** Bar' option The filter field displays at the top of every column. Type in whatever text string you require in the appropriate column to filter the report to show only entries containing that text string in that column.
Filter by degree of completion	In the first field in the toolbar, click on the **drop-down arrow** and select one of these values: • 'All' - Display all entries regardless of degree of completion • 'Completed' - Display only those entries where the allocation is 100% completed • 'Above cut-off' - Display only those entries that are more than a certain percentage complete • 'Below cut-off' - Display only those entries that are less than a certain

	percentage complete
	In the second field in the toolbar, either type a threshold value or increment to the value using the up/down arrows, to set the percentage completion for the 'Above/Below cut-off' options.
Filter according to start/end date	Click on the fourth toolbar icon from the right (the funnel).
	The 'Resource Filters' dialog displays.
	In the 'Start Date' and/or 'End Date' field, click on the **drop-down arrow** and select the appropriate qualifier:
	• 'After'
	• 'Before'
	• 'Equal To'
	• 'Not Equals'
	In the date fields, click on the checkbox to activate the fields and either type in the day, month and year or click on the drop-down arrow to select the date from a calendar.
	The fields have an AND relationship; an entry must satisfy both date criteria before it is displayed.
Print the report	Either:
	• Click on the second toolbar icon from

	the right (the printer) or • Right-click on an entry in the report and select the 'Print' option The 'Print' dialog displays, on which you specify the printer to use and the characteristics of the print job.

Progress Bars

Progress bars are horizontal bands that show the degree of completion of a task or process. They give a quick indication of the current status of, for example, projects, tasks or budgets, which can be useful for checking how close a task or project is to completion or if a project is coming close to hitting its total allowed budget.

Progress bars can be especially useful in large projects that consist of multiple smaller projects, as you can display within one element separate bars showing the degree of completion of each sub-project and of the main project, giving you an overview of progress at a single glance. Separate elements within the diagram can contain further progress bars for the metrics of the individual projects, adding levels of detail that can, again, be assessed in a brief review.

In Enterprise Architect, progress bars are implemented using Tagged Values on elements. They are automatically added to elements on a Kanban diagram or Construction diagram, where progress or resource consumption are indicated.

Release 10.2.5

Total Completion

[===========   ] 59%

Budget

Total Cost

[===========   ] $270,000

Projects

Project Anubis

[===================]

Project Hades

[==========   ]

Project Hades

Cost

[=====   ] $150,000

Progress

[====   ] 37% complete

Tasks

Deploy

[   ]

Design

[=============   ]

Help Topics

[===   ]

Implement

[=======   ]

Project Anubis

Cost

[===============   ] $180,000

Progress

[===============   ] 82% complete

Tasks

Deploy

[======   ]

Help Topics

[=============   ]

Using Progress Bars

You can add progress bars to any element that can show compartments and that can display any numerical value within a range, when displayed on a diagram.

Progress bars can be used to display things such as:

- The current progress of a task or project
- How much of project's budget has been used

By default a progress bar will display a value between 0 and 100 (inclusive); however, it is possible to adjust both the minimum and maximum values to set any range of values required.
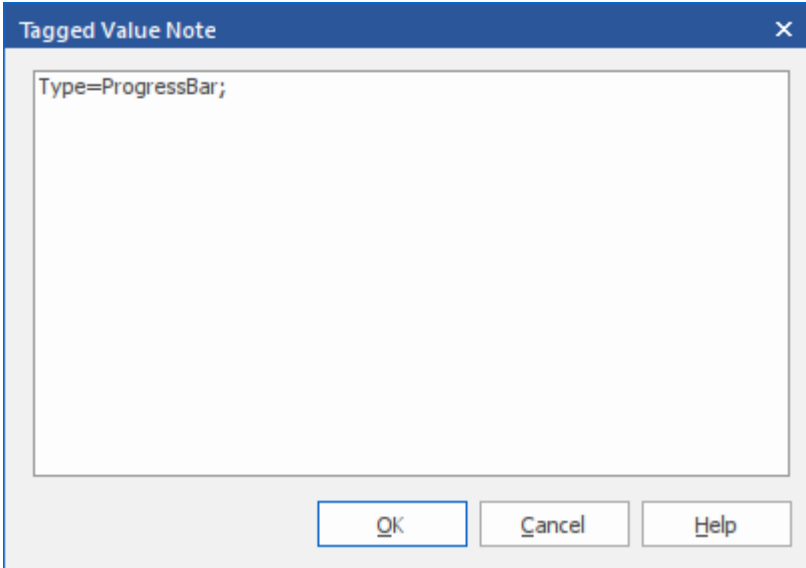
This illustration shows an example of a default progress bar:
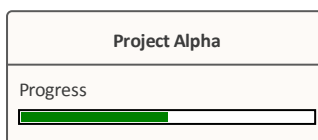
Creating a Progress Bar using a new Tagged Value

Use this procedure to create a progress bar using a simple Tagged Value that you create immediately from scratch.

| Ste p	Action
1	On a diagram, create an element that can display

	compartments (such as a Requirement or Feature) and add a simple Tagged Value to it.
2	From the 'Tags' tab of the **Properties window** open the tag's notes and add 'Type=ProgressBar;' (including the semi-colon) and then click on the **OK button**.
	(You can add further options to the Tagged Value, as described in the *Additional Progress Bar Options* table.)
3	Click on the element and either press **Ctrl+Shift+Y** or right-click and select the 'Compartment Visibility' option. The 'Compartment Visibility' dialog displays.
4	Select the 'Tags' checkbox in the 'Show Element Compartments' panel, then click on the **OK button**. The progress bar will now display on the element on the diagram, with the Tagged Value name above the

	bar.
5	In the 'Tags' tab of the **Properties window**, indicate progress by typing a number between 1 and 100 into the 'Value' field for the tag. On the diagram, the appropriate length of the progress bar is filled in green.

Creating a Progress Bar from the 'UML Types' dialog

You can also define a progress bar Tagged Value from the 'UML Types' dialog that can then be applied to any element, without having to set the Tagged Value notes each time.

Step	Action
1	Select the 'Configure > Reference Data > UML Types' ribbon option to display the 'UML Types' dialog and click on the '**Tagged Value Types**' tab.
2	In the 'Tag Name' and 'Description' fields, type a name and description for the Tagged Value. In the 'Detail' field type the option parameters and their values for the Tagged Value. Click on the **Save button** and on the **Close button**.
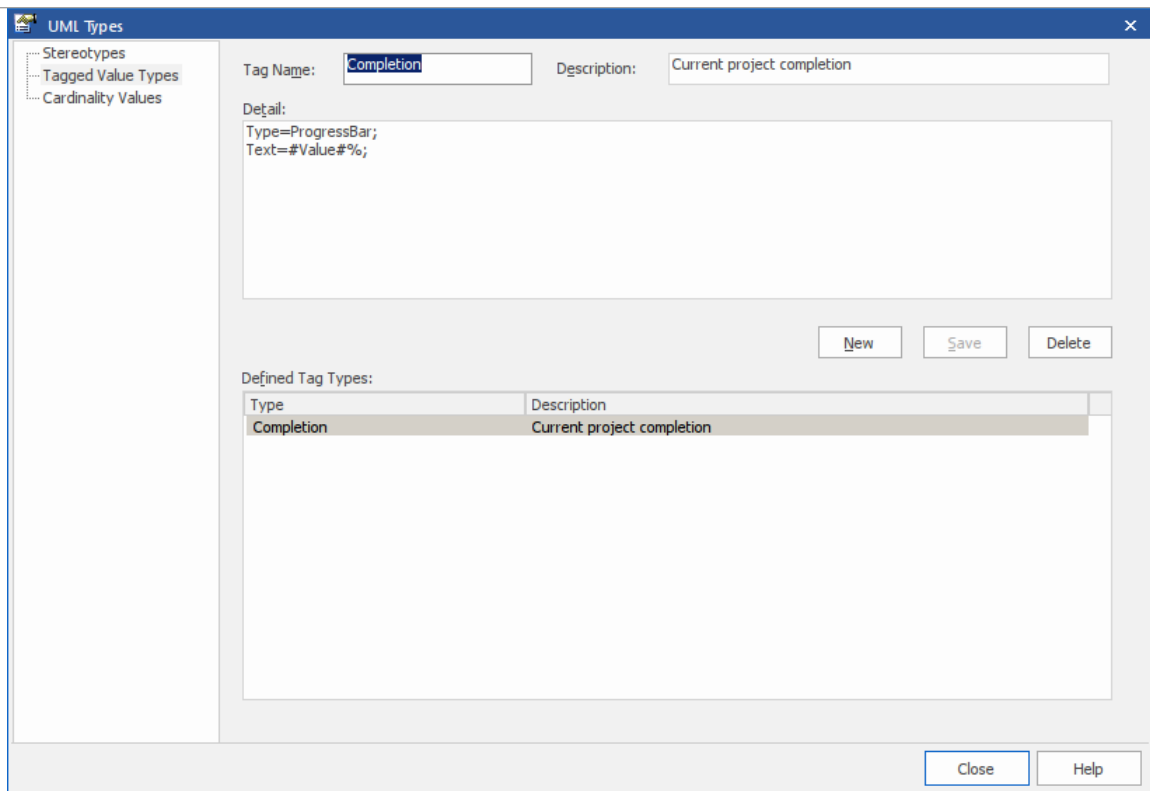
(The option parameters are described in the *Additional Progress Bar Options* table.)

3	Select the 'Start > Desktop > Design > Properties' ribbon option to open the **Properties window** (if it is not already open) and select the 'Tags' tab.
	On a diagram select an element, then on the 'Tags' tab click on the (New Tagged Value) button.
	In the 'Tag' field of the Tagged Value dialog, click on the **drop-down arrow** and select the Tagged Value you created in step 2, then click on the **OK button**.
4	On the diagram, right-click on the element and select the 'Compartment Visibility' option to display the 'Compartment Visibility' dialog.

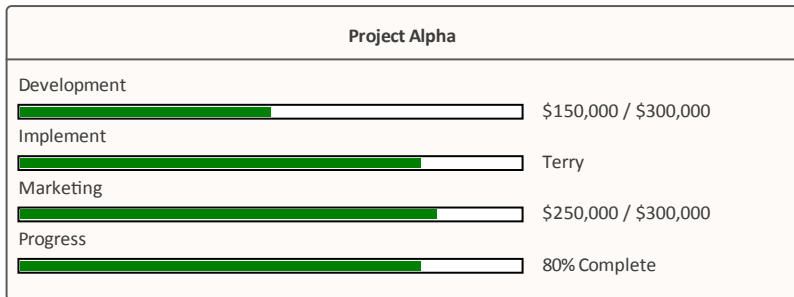| 5	Select the 'Tags' checkbox and click on the **OK button**.
6	On the 'Tags' tab, change the number in the value field a few times, clicking off the field each time. Notice the effect this has on the progress bar.

Additional Progress Bar Options

A default progress bar will show the Tagged Value name and reflect values in the range 0-100. You can change the range values if required, and display text to the right of the bar if more information has to be provided. The background, border and fill colors of the progress bar are, by default, determined by the currently-applied inbuilt diagram theme. However, you can apply your own colors to one of more of these properties.

Use these parameters to enhance the progress bar.

Parameter	Description
MinVal	Use the MinVal option to set the lowest allowed value to be represented on the progress bar. • Syntax: MinVal=\<number\>; A progress bar with the setting

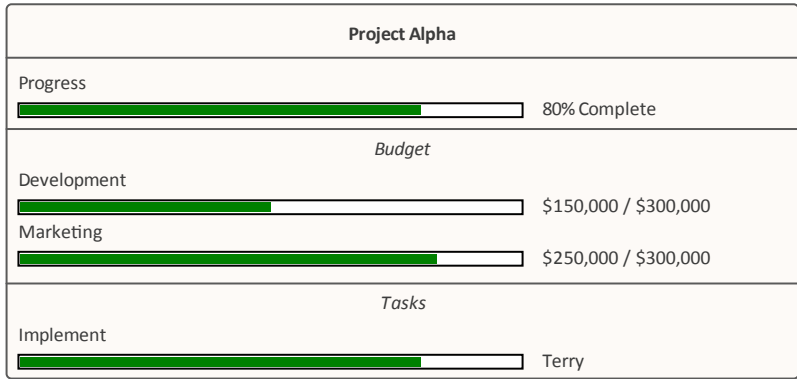|	MinVal=10; will start at 10. Values lower than 10 will not be shown on it.
	If a maximum value (MaxVal) has been defined, the progress bar will show any values between MinVal and MaxVal (inclusive); otherwise, the maximum value will default to MinVal + 100. So, if MinVal=10, the progress bar can show values between 10 and 110 (inclusive).
MaxVal	Use the MaxVal option to set the highest allowed value to be represented on the progress bar. • Syntax: MaxVal=<number>; A progress bar with the setting MaxVal=300; will show values up to and including 300. Values higher than 300 will not be shown. If a minimum value (MinVal) has been set, the progress bar will show any values between MinVal and MaxVal (inclusive); otherwise the minimum value will default to 0. So, if MaxVal=300 the progress bar can show values between 0 and 300 (inclusive).
Text	Use the Text option to define additional text to display on the right hand side of the progress bar. The text might be a

	resource name or the current take up of the total allowed budget of a project.
	• Syntax: Text=<text>; - displays the defined text string, such as 'David Brown's Tasks'
	• Syntax: Text=#Value#; - displays the value of the progress bar Tagged Value, such as '462' (where the Tagged Value name itself might indicate the type of value or unit)
	• Syntax: Text=<text> #Value# <text>; - displays the value of the progress bar Tagged Value with text before and/or after it, such as '$<value> of $100,000'
	This illustration shows a number of examples of using the Text option.
	Project Alpha Development [progress bar] $150,000 / $300,000 Implement [progress bar] Terry Marketing [progress bar] $250,000 / $300,000 Progress [progress bar] 80% Complete
Compartment	By default, progress bars in an element display together in a separate compartment from other types of Tagged Value (provided that the diagram and/or element is set to display tag compartments).

When there are several progress bars on an element, each relating to a different factor of the project, it can become harder to distinguish between them. In these cases it is possible to set the progress bars to display in specific compartments in order to increase clarity. This also provides an additional level of labeling. So you might have an element relating to costs, and two or more compartments that indicate costs of different departments, where the department name is reflected in the compartment name. Or compartments that each contain two or more progress bars indicating, say, the costs and percentage completion of tasks in each department.

- Syntax: Compartment=<name>;

To add multiple progress bars to the same compartment simply give the progress bars the same compartment name.

This example shows the element from the Text parameter example, but with the use of compartments to aid in readability.

	Project Alpha Progress ▬▬▬▬▬▬▬▬▬▬ 80% Complete *Budget* Development ▬▬▬▬▬▬ $150,000 / $300,000 Marketing ▬▬▬▬▬▬▬▬ $250,000 / $300,000 *Tasks* Implement ▬▬▬▬▬▬▬▬ Terry
BackClr	Use the BackClr option to override the color used for the unfilled portion of the progress bar. • Syntax: BackClr=<color>; <color> can be one of a variety of values, such as the RGB value **rgb(198,198,198)** for a light gray color. See the *Progress Bar Color Options* table for a full list of available values when setting colors.
FillClr	Use the FillClr option to override the color used for the filled portion of the progress bar. • Syntax: FillClr=<color>; <color> can be one of a variety of options, such as the hex value **#0000ff** for a bright red. See the *Progress Bar Color Options* table for a full list of available values when setting colors.

| BorderClr	Use the BorderClr option to override the color that is drawn around the edges of the progress bar.
	• Syntax: BorderClr=<color>;
	<color> can be one of a variety of options, such as the keyword **elementtext** to select the same color as the current element's text color.
	See the *Progress Bar Color Options* table for a full list of available values when setting colors.

Example

The Requirement element 'REQ015 - Process Credit Card Payment' is given a Tagged Value named 'Completion', with a value of '66'.
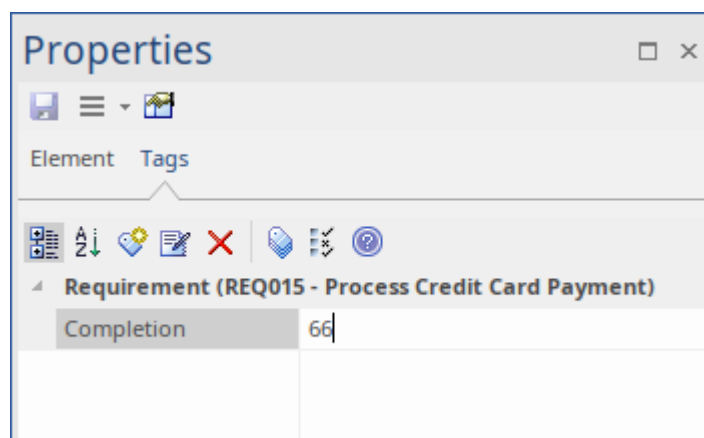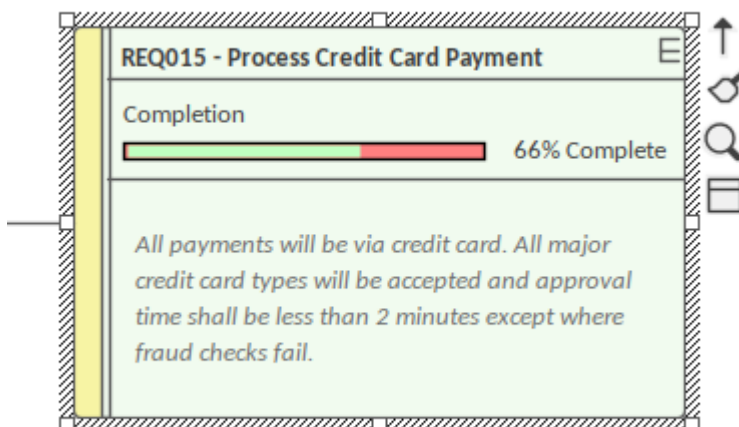

In the Tagged Values Notes, we specify

'Type=ProgressBar;' along with display text and color settings.
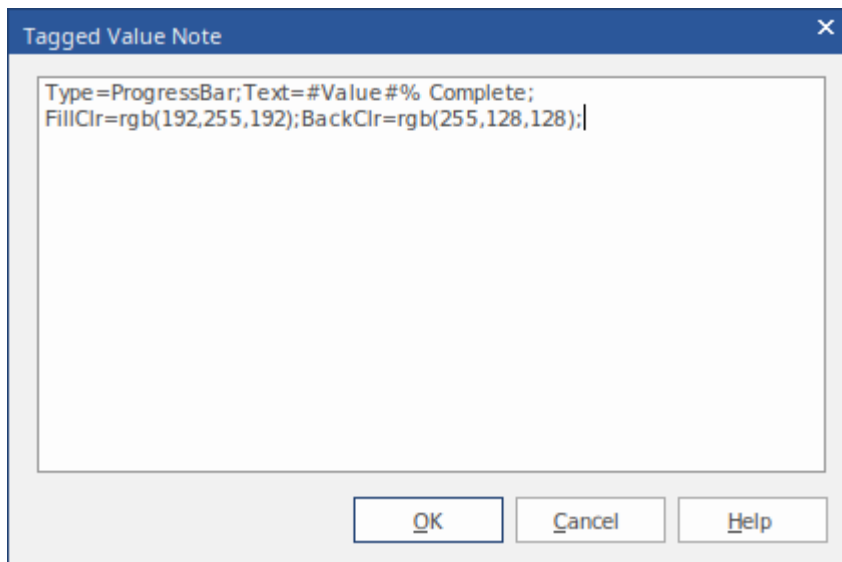
The result is the Progress Bar seen here:

Progress Bar Color Options

This table lists the different types of value that can be used with the options BackClr, FillClr and BorderClr when setting custom colors for a progress bar.

Value	Description
rgb(red,green ,blue)	Using rgb values you can set the red, green and blue color components to create the color you require. **Example**: BackClr=rgb(46, 139, 87); //Sets the unfilled portion of the progress bar to a sea green color. • The red, green and blue values each have a range of 0 to 255 This option can be useful in conjunction with the color pickers from the 'Layout' tab as they give an RGB value for the currently selected color.
hsl(hue, saturation, luminosity)	Using hsl is very similar to using rgb. Unlike rgb, however, it is easier to create a lighter or darker version of the same color by simply adjusting the luminosity, or to increase or decrease the intensity of the color by adjusting the saturation. **example**: FillClr=hsl(197, 71, 73); //Sets the filled portion of the progress bar to a sky blue color. • The hue value has a range of 0 to 360 • The saturation and luminosity values each have a range of 0 to 100

Hex Values	Colors can also be defined using a hex value.
	example: BorderClr:#000000; //Sets the border color of the progress bar to black.
	• Hex values range from #000000 to #ffffff
HTML Color Names	It is also possible to use the standard web color names when defining a color for progress bars.
	example:fillclr=aliceblue; //Sets the filled portion of the progress bar to the standard color 'aliceblue'
	• Enterprise Architect supports the 140 standard HTML color names.
Element Colors	Using ElementFill, ElementLine or ElementText will set the color value to the fill, line or text color of the currently-selected element (that is, ElementFill will apply the element's current fill color).
	Colors set this way can be further refined by using the modifiers **s:=\<value\>** and **l:=\<value\>** to modify the color's saturation and luminosity, making the color assigned to the progress bar a slightly altered version of the currently selected element color.

	These settings can be useful if the element is expected to change color (such as from the use of a Diagram Legend) to keep the progress bars themed correctly with the element.
	example: backclr=elementfill:s=-10:l=20:; //Sets the unfilled portion of the progress bar to be the same as the element's fill color but with a 10% decrease in the color's saturation and a 20% increase in the luminosity.
	• **s** and **l** can be any value; however, the results can vary depending on the currently selected color (for example, a luminosity increase of 20% might not be as noticeable on a very light color compared to a darker color)
none	The none keyword is used to indicate that no color should be applied to the selected field. **example:**borderClr=none; //Removes the border from the progress bar.

Progress Bars with MDG Technologies

Progress bars can also be created within MDG Technologies to define a consistent set of progress bars for use with multiple projects.

Personal Tasks

Using the **Personal Tasks** view, you can record and manage your personal work within the project. This view displays information based upon your identity as a defined Author on the project.

Access

Ribbon	Start > Collaborate > My Gantt

Work Category

Category	Detail
Allocated Work	Presents a Gantt chart on which you record the work that you are currently engaged in.
Project Tasks	Enables you to monitor and maintain the work tasks that have been assigned to you, or that you have created yourself.

Review Allocated Work

The 'Allocated Work' tab lists the elements to which your model Author ID has been allocated as a resource, where your Author ID is the same as:

- Your Enterprise Architect security user ID, if security has been enabled, or
- Your workstation login ID if security has not been enabled

For each element, the tab:

- In the left-hand panel lists the roles or tasks assigned to you as a resource on that element, for which the 'Complete %' field value is less than '100'
- In the right hand panel displays a Gantt chart showing your progress in performing each role or task

You can add further work items for an element through the 'Allocated Work' tab; however, you cannot delete any records. A record is no longer listed when the 'Complete %' field value is '100'.

You or your supervisors can also add records through the **Resource Allocation window**.

Access

Ribbon	Start > Collaborate > My Gantt >

	Allocated Work

Select Allocated Work options

Option	Action
Review element properties	Double-click on the element name. (Alternatively, right-click on the element name and select the 'Show Element Properties' option.) The 'Properties' dialog for the element displays; review the pages as required.
Review resource task details	Double-click on the task item. (Alternatively, either: • Double-click on the progress bar for the item on the Gantt chart, or • Right-click on the task or role name and select the 'Show Task Properties' option) The 'Assigned Resources' dialog displays, which has the same content, format and functions as the **Resource Allocation window**, in 'Item' mode. Should it be necessary to reassign the

	item to another resource, click on the **drop-down arrow** on the 'Resource' field and select the appropriate 'Author ID'; when you save the changes, the item no longer appears in the list of tasks assigned to you.
Create new task item	Right-click on the element name and select the 'Add Resource' option. The 'Assigned Resources' dialog displays, with your Author ID in the grayed-out 'Resource' field. Complete the dialog as for the **Resource Allocation window**.
Refresh display to incorporate changes	Your work item can be edited in a number of places in Enterprise Architect, such as the **Project Task Allocation window** and the 'Resource Allocation' tab; the element to which it is assigned can be edited in these and many other areas. To refresh the display with any changes made elsewhere, right-click on the display and select the 'Refresh' option.
Display the Resource Allocation	Right-click on the entry and select either of the options: • 'Show Element **Resource Allocation**

records for the element	**window**' (if the window is closed or hidden)
	• 'Find Task in Element Resource Allocation window' (if the window is visible but showing the details of another element)
	The Resource Allocation window displays, with the details of the selected entry shown in the fields and the other resource allocations for the element listed in the left-hand panel.
	You can edit the details and, if necessary, change the resource allocated to the element.
Display tasks for today only, or for another day only	Right-click on the display and select the option:
	• 'Show only Active tasks for today' - to show only tasks that are in progress today
	• 'Show only Active tasks for another day' - to show only tasks that were in progress on a specific day in the past, or that are scheduled to be in progress on a day in the future; a calendar dialog displays from which you select the day to examine
Filter the	The display default is to show current

display by Start or Completion date	tasks for which the end date has not yet occurred. Right-click on the list and select one of the options: • 'Include Completed Tasks Within the Last ...' - to display incomplete tasks and tasks completed only within the last period; you can set this period to 7, 30 or 90 days, or you can include all completed tasks, or hide all completed tasks • 'Include Future Tasks Starting in ...' - to display current incomplete tasks and completed tasks (depending on the setting of the 'Include Completed Tasks Within the Last ...' option) and future tasks that have been recorded and are due to start within the next period; you can set this period to 7, 30 or 90 days, or you can show all tasks that have been recorded but are not yet due to start
Identify overdue tasks amongst the items	Right-click on the display and select the 'Display Highlight For Overdue items' option and one of its sub-options: • 'Show in Red' - to display the uncompleted percentage of the task bars for overdue items on the Gantt chart in red

	• 'Show in Red to Current Date' - to extend the task bars of the overdue items to today's date, and display them in red • 'None' - to cancel any overdue item highlighting that has been set
Display ONLY overdue tasks	Right-click on the display and select the 'Show Overdue Items Only' option. The display shows only those items for which the end date has passed but that are not 100% complete. These items do not have red highlighting.
Locate the element in the Browser window	Right-click on either the element or the work item and select the 'Find in Project Browser' option. The appropriate Package hierarchy expands in the **Browser window**, and the selected element is highlighted.
Reposition the Gantt chart to automatically show the end date of a selected allocation	Right-click on the display and select the 'Go to | Auto Sync with Task End Date' option. Whilst this option is selected (with a tick next to it), whenever you click on an allocation in the 'Allocated Work' tab the display adjusts to show the end date of the task in the center of the chart.

Expose hidden sections of the work item progress	Some items might operate over a long period of time, and you might not be able to display the complete progress line for the item in the Gantt chart.

To locate the start point, expected end point, or today's date on the progress line for an item, right-click on either the item or the progress line and select the appropriate option:
· Go To \| Task Start Date
· Go To \| Task End Date
· Go To \| Today's Date
The Gantt chart shifts left or right to position the required point in the center of the display. |
| Execute Scripts | If scripts have been defined for analyzing the task data, click on the 'Scripts' option to display the list of script names. Click on the appropriate name to execute the script on the selected item or items. |
| Filter the work items | You can refine the list of work items to show only those containing text that matches the filter item.

Right-click on the tab and select the 'Show **Filter** Bar' option. |

	The filter bar displays at the top of the panel; type in the filter text.
	As you type, the items listed and the Gantt chart are filtered to show only items where the item names match the text string.
	The filter does not operate on the element names.
	If you do not want to use the filter, right-click on the tab and select the 'Hide Filter Bar' option.
Capture an image of the Allocated Work data as a graphics file	Right-click on the tab and select the 'Save Image to File' option.
	The 'Save As Image' dialog displays, on which you specify the file name, location and graphics file type to save to.
Copy an image of the Allocated Work data to the clipboard	Right-click on the tab and select the 'Copy Image to Clipboard' option.
	You can paste the image from the clipboard into your preferred graphics package.

Monitor Your Tasks

The '**Project Tasks**' tab lists the tasks that you either:

- Own, or
- Are assigned to

You can use the tab to review the status and progress of tasks that you are responsible for, and to modify and filter the display of task information. You can create the tasks through the:

- 'Project Tasks' tab of the My Gantt display itself
- The Project Management Project Tasks view (of all tasks in the project), or the
- 'Project Tasks view of the Resource **Calendar**

Access

Ribbon	Start > Collaborate > My Gantt > **Project Tasks**

Make selections from the options

Option	Action

Add or Modify a task	You add or modify a task through the 'Task Detail' dialog, which displays when you double-click on an entry (edit) or blank line (create).
Delete a task	Right-click on the message and select the 'Delete' option. You are prompted to confirm the deletion.
Select columns	Right-click on the column headings and select the 'Field Chooser' option, which enables you to add or remove specific columns from the display. You can also click on the column headings and drag them across the header bar to reposition the columns in a different sequence.
Reorganize tasks in the list	Either: • Click on the column heading and click on the arrow head to list items in order or reverse order, or • Right-click on the column headings and select the 'Enable Group Box' option to organize the messages into groups You can also use the filter bar to filter the

	display on an appropriate column value, such as the value 'New' in the 'Status' column; to display or hide the filter bar, right-click on the column headings and select the 'Toggle **Filter** Bar' option.
Set persistent Status filter	Right-click on the tab and select the 'Set term filter' option. The '**Filter** by Status' dialog displays, which enables you to select to list tasks of any status or only of one specific status. The filter you set persists when you close the **Personal Tasks** window or exit from Enterprise Architect.
Print the task list	Right-click on the tab and select the 'Print List' option. The 'Print' dialog displays, on which you specify the local printer and the print characteristics.

Project Tools Window

The **Project Tools window** shows the records of these quantities associated with an element contained in the model:

- Decision - a choice made on a requirement of the element
- Event - an action taken on a requirement of the element
- Issue - a failure of the element to meet a requirement
- Task - an item of work on the element assigned to a resource to meet a requirement
- Effort - effort expended in work on the element
- Risks - risk associated with the element
- Metrics - metrics measured for an element

A separate tab of the Project Tools window or - for Issues and Tasks - report list displays for each of these quantities.

Access

Ribbon	Construct > Project Management and as required, one of: > Events | Show Events Window > Decisions | Show Decisions Window > Issues-Tasks | **Project Tasks** > Issues-Tasks | Project Issues

	• > Effort • > Risks • > Metrics
Keyboard Shortcuts	Click on the required Project item on a diagram or on the 'Details' tab of the **Inspector window**, then press **Shift+Enter**

Context Menu Options

You can add or delete individual items in any of the tabs of the **Project Tools window**, using the window context menu options.

Icon	Action
Add New	Create a new Decision/Event item, using the '<type> details for <element type> <element name>' dialog, in the same way as you create Maintenance items. Create a new Risk/Metric/Effort item, using the '<type>' dialog.
Modify Selected	Update the selected Decision/Event item, using the '<type> details for <element

	type> <element name>' dialog. Update the selected Risk/Metric/Effort item, using the '<type>' dialog.
Create as New Element	Create a new element based on the Project Decision/Event item, in the same way as you generate elements from Maintenance items.
Print List	Print the list of items.
Delete	Delete the selected item from the list.

Notes

- Click on an element in the **Browser window** to switch to the project management items for that element in the **Project Tools window**

- Columns in the item list can be reorganized, added, removed, grouped, filtered and sorted using the options provided in the List Header facilities

- Right-click on the list to view the context menu, which you can use to also add and delete items in the window

- You can move Decision and Event items between elements; see the *Move Decisions/Events Between Elements* Help topic

Move Decisions/Events Between Elements

A Decision or Event you define for one element might be usefully moved to another if, for example, you are moving your model through stages in a lifecycle or, indeed, modeling a lifecycle. It is possible to simply drag a Decision or Event from either the appropriate tab of the **Project Tools window** or the 'Details' tab of the **Inspector window**, onto a different element on a diagram.

Access

From the **Browser window**, open the diagram containing the target element, then click on the element from which to move the Decision or Event. It is convenient to have both source and target elements on the same diagram, but it is possible to select the source element in the Browser window or on a different open diagram.

It is also convenient to have compartments enabled on the target element, with the 'project' compartment selected, so that you can observe the addition of the moved item. (Right-click on the element and select 'Compartment Visibility', then select the 'Project' checkbox.)

Ribbon	Start > Desktop > Design > Browser > Element - expand the 'Project' category

	or
	Construct > Project Management > Decisions > Show Decisions Window
	Construct > Project Management > Events > Show Events Window
Keyboard Shortcuts	**Alt+2** | Project > Decisions or > Events

Move the Decision or Event to the Target Element

Click on the item that you intend to move, and simply drag it onto the target element. The item name will display in the 'project' compartment of that element. What you would observe might resemble this illustration.

Stage 1

c

Stage 2

project

Decision
    Change Conveyor   New

Event
    Bring conveyor online   New