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HALLIBURTON BAKER HUGHES INTEGRATION

M&A Central Quick Reference Guide Managing My Tasks

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HALLIBURTON

Topic

■ Managing My Tasks Panel

- Additional Tips and Best Practices
- My Tasks Panel
- Using the My Tasks List for Task Management
- Target Date Relationship & Percent Complete
- Tasks Status & Actual Dates
- Task Status
- Starting Multiple Tasks
- Actions That Should Not Be Used or Performed
- Updating Tasks by Exporting/Importing
- Completing Tasks
- Alternative View to Display Tasks
- Changing Actual Start Date
- Associating a Task to a Document

Additional Tips and Best Practices

- If the panel is not displayed, go to **Personal** → **My Profile** → **Edit** → **Preferences** and check the Display box for My Tasks.
- Click on the wrench  icon to customize the *My Tasks* panel. Configure the **Task to Display** options, **Visible Columns**, **Sort Keys** or the **Maximum number of tasks to display**.
- Click on the **Select view columns** icon  to add or remove columns from the My Tasks list. Choose those fields that require for reference and updating such as Milestone, WBS, Description (Title), Target Start, Complete By, Task State, Percent Complete, Status, Status Comments, Timing, Attachments, Risks, Issues, Value Drivers, Predecessors and Successors.
- Detailed information can be found on this topic in the 04. Training-MA Central–Integration – Deep Dive deck beginning on slide 19.
- Contact **M&A Central Support** to assist you with your first Excel export / import attempt.

Navigate from My Tasks panel to Task Tree

From the My Tasks List view a task cannot be viewed in a hierarchy. To show where a task is located in the Workplan follow these steps:

1. **Select** the Task from the List View.
2. Click the **View** menu.
3. Click the **Find in Tree** option.

The Task Tree opens and shows the task's parent and other tasks.

The screenshot shows the 'My Tasks' panel with a table of tasks. A red circle with the number '1' points to the task '6.1.1.3.2.2 Produce a white paper on resolving gaps'. A red circle with the number '2' points to the 'View' menu. A red circle with the number '3' points to the 'Find In Tree' option in the View menu.

	WBS	Title
1	6.1	Fin
2	6.1.1.1.1.4	Dra
3	6.1.1.1.1.5	Rev
4	6.1.1.1.1.6	Cre
5	6.1.1.1.1.7	Dra
6	6.1.1.3.2.2	Produce a white paper on resolving gaps

	WBS	Title	Start Date
20	6.1.1.3	Hierarchy Mapping	
23	6.1.1.3.1	ERROR DEPTH	
0	6.1.1.3.2	Create Accounting Calendar Alignment Appr	
0	6.1.1.3.2.1	Align and compare existing calendars	
0	6.1.1.3.2.2	Produce a white paper on resolving gaps	
0	6.1.1.3.3	Socialize The White Paper And Incorporate	
0	6.1.1.3.4	Define High Level Calendar Approach	

Navigate from Task Form

- From the Task form use the tabs to navigate. The **Detail** tab shows the current task's data. Column widths are adjustable for better visibility and editing of tasks.
- The **Subtasks** tab allows the user to navigate to the task's subtasks view.

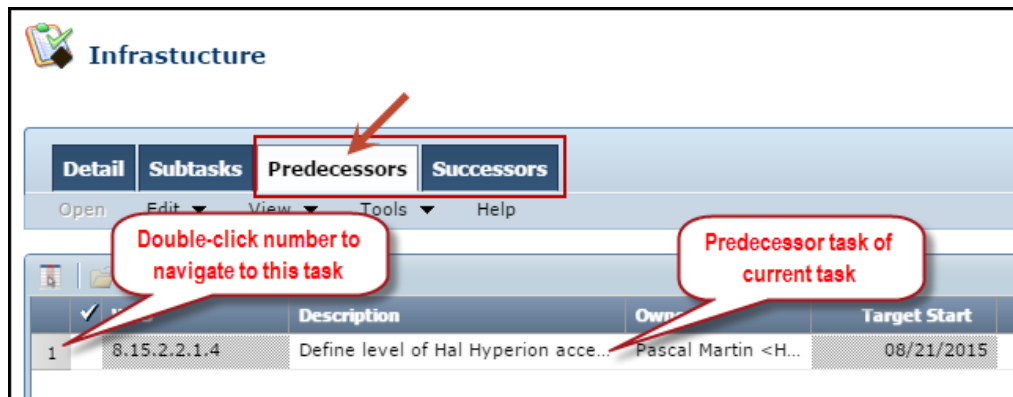
This screenshot shows the 'Subtasks Form Tab' in the Infrastructure application. The 'Subtasks' tab is selected and highlighted with a red box. A red callout bubble points to the tab with the text 'Subtasks Form Tab'. Below the tabs, there are buttons for 'Edit', 'View', 'Assign', 'Schedule', 'Tools', and 'Help'. The status is 'Started' with a green play icon. There are buttons for 'Suspend' and 'Complete'. The 'Percent Complete' is set to 2. A yellow banner at the bottom reads 'Do Not Select the Complete or Suspend buttons on this page:'. The 'Owner' field is empty.

This screenshot shows the 'Subtasks View' in the Infrastructure application. The 'Subtasks' tab is selected. A red callout bubble points to the number '1' in the first column of the table, with the text 'Double-click number to navigate to Subtask'. Another red callout bubble points to the table with the text 'Subtasks View'. The table has columns: ID, NA, IMO Priority, Description, Target Start, Target End, % Complete, Status, Status Comments, Owner, and zzDoh.

ID	NA	IMO Priority	Description	Target Start	Target End	% Complete	Status	Status Comments	Owner	zzDoh
1	<input type="checkbox"/>	<input type="checkbox"/>	Planning - Deliverable 3 refresh	07/27/2015	08/21/2015	100			Kevin Thomas <HB6535...	
2	<input type="checkbox"/>	<input type="checkbox"/>	Day 1 Release	07/01/2015	12/16/2015	14	Green	Teams are moving forward with execution for Day 1 projects. No issues identified.	Kevin Thomas <HB6535...	

Navigate from Task Form

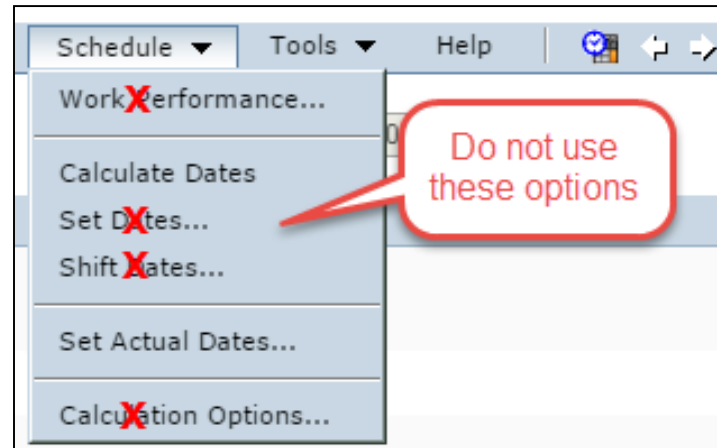
- Also, the **Predecessors** / **Successors** tabs allow for navigation and direct editing of those tasks. Column widths are adjustable for better visibility and editing of tasks.
- Select the desired dependency tab and verify the dependent tasks.
- Double-click on the number to the left to navigate to the dependent task



- The **Predecessor** / **Successor** tab view allows for certain functions like selecting the view columns, opening a task, adding a task or saving changes. Remember, **do not** Delete tasks in MAC.
- If a **Predecessor** of a task is completed and/or deleted, the owner of the task with the assigned predecessor receives each system **notification** via email.

Actions That Should Not Be Used or Performed

- **Do not** use the following options in the task form: **Work Performance**, **Set Dates**, **Shift Dates** and **Calculation Options**.



- If exporting a Workplan to Excel, the tasks **cannot** be **Promoted** or **Demoted** in the export file. Promote and Demote can only be done from the Task Tree.

2	WBS	Depth	Title	% Compl.	Act. End
3	6.9.1		3 Consolidations and Reporting	34	
4	6.9.1.1		4 Discovery (Planning and	100	
5	6.9.1.1.1		5 Analyze Phase and	100	4/20/2015
6	6.9.1.1.1.1		6 Analyze and follow	100	4/1/2015
7	6.9.1.1.1.2		6 Identify all deep dive	100	4/14/2015
8	6.9.1.1.2		5 Host Deep Dive Meetings	100	6/7/2015
9	6.9.1.1.2.1		6 Prep deep dive	100	6/1/2015
10	6.9.1.1.2.2		6 Host Reporting Deep	100	6/1/2015
11	6.9.1.1.2.3		6 Plan Additional /	100	7/30/2015
12	6.9.1.1.2.4		6 Complete Deep Dive	100	5/30/2015
13	6.9.1.1.2.5		6		5/30/2015
14	6.9.1.1.2.6		6		5/30/2015
15	6.9.1.1.2.7		6		5/30/2015
16	6.9.1.1.2.8		6		5/30/2015
17	6.9.1.2		4		
18	6.9.1.2.1		5 Day ONE Accounting	21	
19	6.9.1.2.1.1		6 Plan follow up	100	6/30/2015

Actions That Should Not Be Used or Performed

- When inserting new tasks, **do not** enter a **WBS** number. The WBS number will be automatically generated after the import process.
- **Do not** change any of the existing WBS numbers in the export file to change the sequence.

8	6.9.1.1.2	5	Host Deep Dive Meetings	100	4/28/2015
	6.9.1.1.2.1	6	Prep deep dive materials for reporting deep dive meetings	100	4/10/2015
9					
10	6.9.1.1.2.2	6	Host Reporting Deep Dive Meeting - Meetings and Follow Up sessions (Meeting)	100	4/24/2015
	6.9.1.1.2.3		Plan Additional / Follow-up Deep Dive Sessions	100	5/26/2015
11					
	6.9.1.1.2.4		Complete Deep Dive Report Back For		5/1/2015
12					
13	6.9.1.1.2.5	6	ns & Reporting -		5/21/2015
14	6.9.1.1.2.6	6	ne execution phase detail		
15	6.9.1.1.2.7	6	workshop agenda (mac submissi	100	4/17/2015
16	6.9.1.1.2.8	6	Day 1 workshop read out	100	4/27/2015
		6	Review and publish workshop findings the mac	100	5/9/2015
17		6	Enter New Task Here		
18	6.9.1.2	4	Design Day 1 Processes / Approach	21	5/8/2015
19	6.9.1.2.1	5	Day ONE Accounting Processes design	21	5/8/2015

Do not enter
WBS number

Enter Depth

Insert new row at
the bottom of the
structure

Task Updates in the Export

2. Make the necessary edits to the exported spreadsheet.

- **Required:** the updates have to be made in exported file, and the same file must be utilized for the import.
- Click **Enable Editing**.
- Update fields.
- **Save As...** to hard drive.

* New tasks cannot be added/deleted through the My Tasks exported file, only updates can be performed. Do not change WBS number or Depth.

My Tasks.xls [Protected View] - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Developer Acrobat

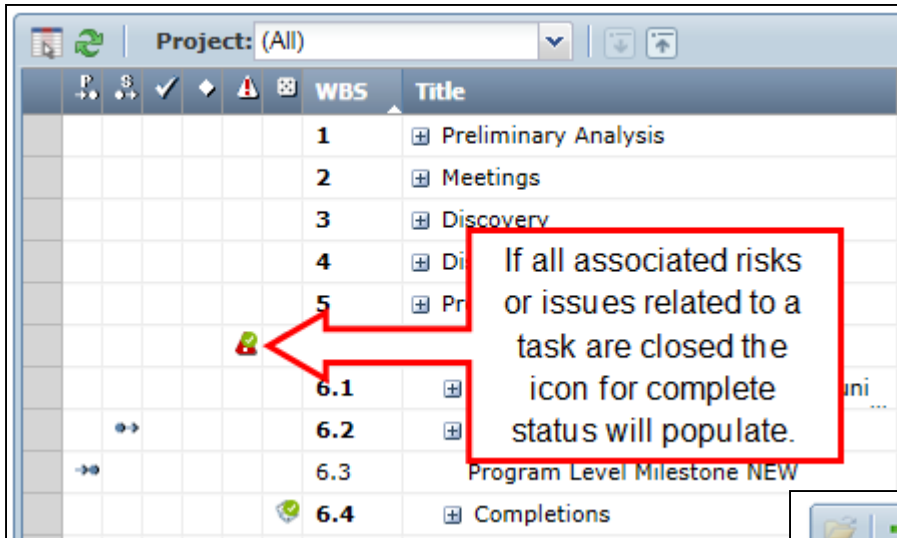
Protected View This file originated from an Internet location and might be unsafe. Click for more details. [Enable Editing](#)

	B	C	D	E	F	G	H	I
2	Phase	WBS	Description	Owner	Target Start	Target End	Status	Status Comments
2	Integration	6.7.1.3.2.2	Produce a white paper on resolving gaps between BHI and HAL calendars (assume HAL calendar controls)	Miguel Morales <H124322>	7/1/2015	8/30/2015	Green	Task progressing on schedule.
3	Integration	6.7.1.3.4.1	Review with tower leads and key stakeholders	Miguel Morales <H124322>	4/2/2015	6/1/2015	Yellow	Delay experienced due to incomplete data
4	Integration	6.7.1.4.1	Management Reporting Reqs Defined	Miguel Morales <H124322>	7/1/2015	8/30/2015	Green	No issues
5					3/17/2015	6/15/2015	Red	No response from Target Company
					3/3/2015	6/1/2015	Green	Task progressing on schedule. No issues or impediments at this time.

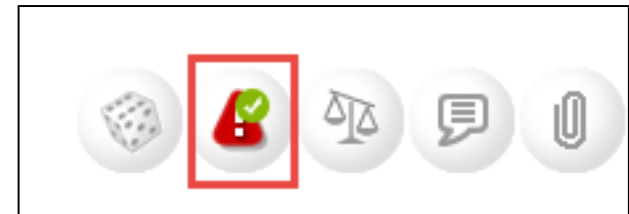
* Make sure not to change column A, row 1 or the **DoNotEdit** tab of the export file. These contain system code.

Associated Element Completed

- If a Task has completed associated elements like Risks or Issues, the Association Icon will display the complete status of that element with a **green** checkmark. The **green** check mark will only display if all associated elements are completed.
- The same is true for completed associated tasks to a Risk or Issue.



Also the Task form displays the completed status icon.



A screenshot of a task form showing a list of associated risks. The table has columns for ID, Identified, Title, and State. A red arrow points from a text box to the green checkmark icon in the 'State' column of row 8. The text box contains the following text: 'If all associated tasks related to a Risk are completed the icon for complete status will populate.'

ID	Identified	Title	State
1	1	Risk	Closed
2	195	08/31/2015 Scarcity of loc...	Open
3	196	08/31/2015 Existing lack o...	Open
4	197	08/31/2015 Limited leader...	Open
5	198	08/31/2015 Key BHI resou...	Open
6			Open
7			Open
8			Open
9			Open
10			Open
11	204	08/31/2015 Equipment m...	Open
12	205	08/31/2015 BD - Custome...	Open

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Questions?

For recommendations or new topics please contact
MAC-Support@Halliburton.com

