All fictitious data is for training purposes
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M&A Central
Quick Reference Guide
Managing My Tasks

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Topic

Managing My Tasks Panel

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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.

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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. **Selec**t 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.

Navigate from Task Form

From the Task form use the <u>tabs</u> 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.

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
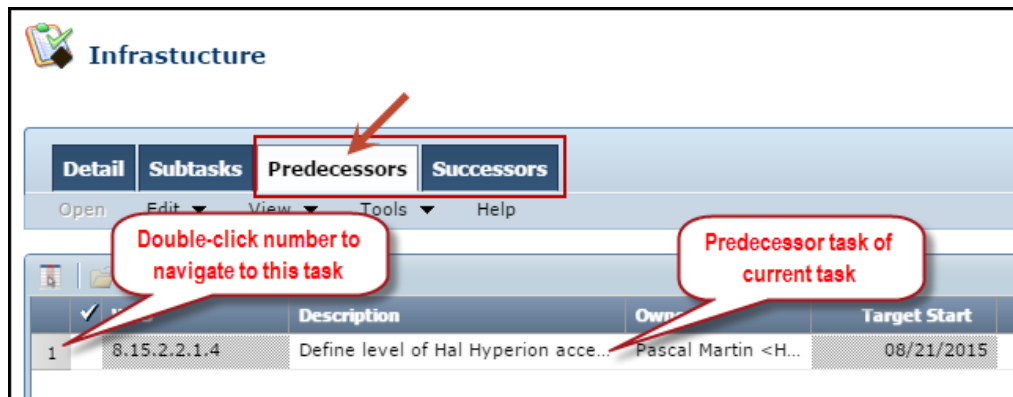
▌ The **Predecessor** / **Successor** tab view allows for certain functions like selecting the view columns, opening a task, adding a task or saving changes. Remember, **do not** Delete tasks in MAC.

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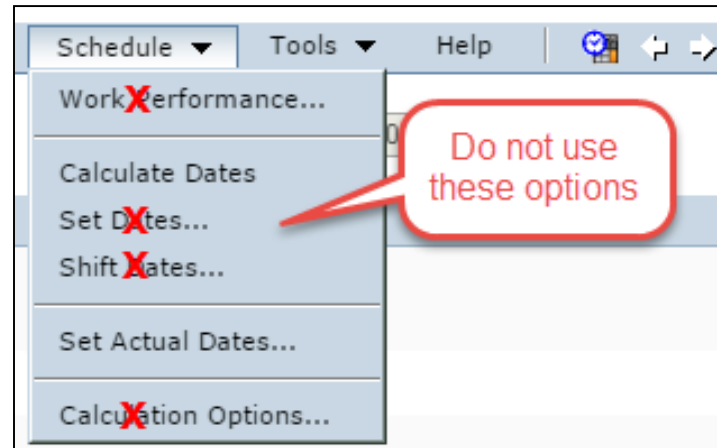
- If exporting a Workplan to Excel, the tasks **cannot** be **Promoted** or **Demoted** in the export file. Promote and Demote can only be done from the Task Tree.

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.

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.

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

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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.
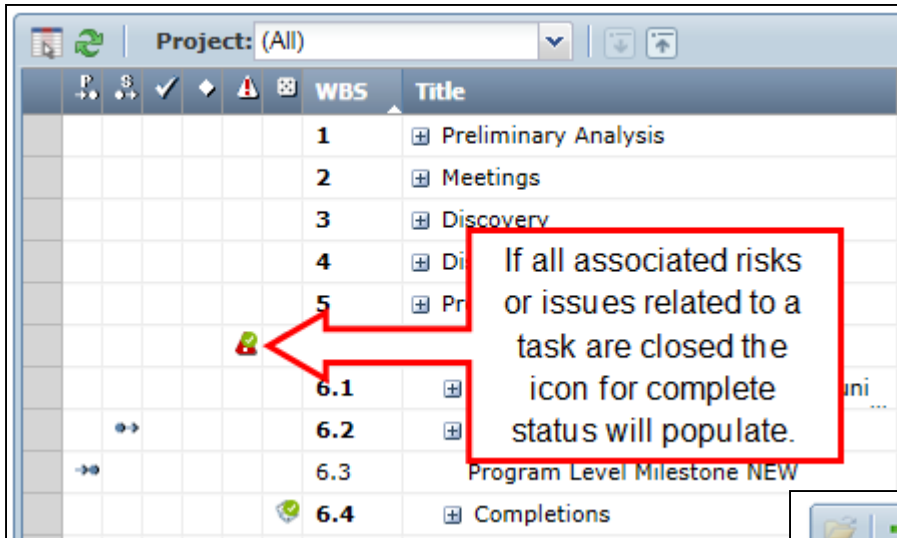
Also the Task form displays the completed status icon.

Questions?

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