



Microsoft
PROJECT FOR THE WEB
Mini Manual

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[GuruSoftware](#)

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GETTING STARTED

Introduction

Project for the Web, a monthly subscription-based service, is Microsoft's most recent offering for cloud-based work and project management. Project for the Web provides relatively simple, powerful work management capabilities to meet many needs and roles. It is for people who want basic project management capacity without the complexity of Desktop Project. Over time Project for the Web itself will develop more complexity, including additional interactive and communicative tools. Project for the Web is in essence the future of Microsoft Project

For info on the future of Microsoft Project, including all versions and plans, click here: [Overview of Microsoft Project - YouTube](#)

Note that Project for the Web requires a Microsoft 365 Business Account. It will not work with a Microsoft 365 account.

PROJECT HOME

Overview

Project Home gives a birds-eye view of the projects and roadmaps that matter the most. It helps keep track of important projects by letting you mark them favorites, so one will see them at the top of the Project Home page.

Go to Project Home

1. Sign in to Microsoft 365, select **All apps**, and then select the **Project** icon. Alternatively, go to project.microsoft.com.
2. On the Project Home page, you'll see all of the projects and roadmaps you've viewed recently, or you can create a new one.

Manage View of Recent and Favorites Lists

You can add and remove projects from your **Recent** list and **Favorites** list in Project Home.

Add a project to the Recent list

1. Open a project or roadmap you want to add to Project Home.
2. The project will automatically be added to the **Recent** list in Project Home.

Remove a project from the Recent list

1. In Project Home, go to the **Recent** list and hover over the project you want to remove.
2. Select **More options** , and then select **Remove from list**.
3. The project will no longer display in the **Recent** list.

Add a project to the Favorites list

1. In Project Home, go to the **Recent** list and hover over the project you want to move to the **Favorites** list.

	<ol style="list-style-type: none"> 2. Select Mark favorite . 3. The project will move to the Favorites list. <p><i>Remove a project from the Favorites list</i></p> <ol style="list-style-type: none"> 1. In Project Home, find the project you want to remove from the Favorites list. 2. In the project card, select More options and then select Remove from favorites. 3. The project will no longer display in the favorites list.
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ESTABLISHING TASKS

Start A New Project	<ul style="list-style-type: none"> -In Project Home, select New blank project. -Select Untitled project and give your project a name (eg Roy's Project). <p>By default, you are the Project Manager and today is the project Start date, but you can change these as needed.</p> <ul style="list-style-type: none"> -You are in Grid view by default (as opposed to Timeline or Board view)
Enter Tasks Info	<ul style="list-style-type: none"> -To enter a task, click Add new task and type a task name (eg Sales Analysis). Then press Enter. -Type another task name and press Enter again until you have a full list of tasks. -You can move tasks up and down by clicking on the left of the task and dragging up -You can delete a task by selecting it and then hitting the Delete key. <p>To select more than one task, select a task, press and hold Ctrl, and then select another task.</p>
Add Durations for Each Task	<p>Click in Duration column for each task and enter a duration (eg 3 days or 2 weeks). Note that a 0 duration task creates a Milestone.</p>
Add Start, Finish and Other Columns	<ul style="list-style-type: none"> -Click on Add Columns,, and add the Start, Finish, % Complete, Effort, and any other columns you see there. <p>Since we earlier entered a Duration for each task, a Start and Finish Date are automatically populated. All tasks initially are set to start on the same date, at the beginning of the project. When we create dependencies, then tasks will start and finish as appropriate.</p>
Summarize, Outline Tasks	<p>Summarizing (also known as outlining tasks) is to create a hierarchy of tasks. The heading is called the Summary Task, and the tasks indented under it can be called the subtasks. Eg you indent three tasks under an existing task causing the first task to become a Summary task.</p> <ul style="list-style-type: none"> -To indent tasks under summary tasks, select the three vertical dots by the task name and choose Make subtask. -You can also choose Promote subtask to move tasks out from under summary tasks. When all subtasks are promoted the summary task turns into a regular task. -You can click on a collapsed Summary task to show the detail tasks (sub-tasks). And when the tasks show in detail under a summary task, you can collapse the summary task by clicking on it.

<p>Create Dependencies/Links Among Tasks</p>	<p>On a project, dependencies determine when tasks start and finish. Eg if task 3 is dependent on task 2, then task 3 will normally start when task 2 finishes. We can add dependencies in Grid or Timeline view.</p> <p>In <u>Grid</u> view, click in Depends On field, and select linking task that will drive current field from the pop-up. (Note: you can also type part of the task name to call it up.) The task ID is entered. If you hover over the number, you will see the name of the task. Alternately, select a few tasks, right click them, and select Add Dependency, and a finish to start link will be created among those tasks.</p> <p>-Or add dependencies in the Gantt chart by selecting <u>Timeline</u> view and then dragging connectors between tasks by clicking on “+” at end of task bar and dragging to beginning of another task. Alternately, select a few tasks, right click them, and select Add Dependency, and a finish to start link will be created among those tasks.</p> <p><i>Zooming In and Out</i> – You can zoom in and out of the screen by clicking and dragging the Zoom lever at the top of the Timeline view.</p>
<p>Entering Effort (work) Instead of Duration</p>	<p>Effort Calculated Effort (also called Work) is the number of hours generated by multiplying the duration X the team members assigned. Eg if a member works on a task for two days, then the effort is $8 \times 3 = 16$ for that resource. If there are additional resources, then the effort increases proportionally.</p> <p>Entering Effort Instead of Duration Also instead of entering the Duration for a task, you can begin by entering the Effort hours. Once team members are then assigned, the Duration gets calculated.</p>
<p>Details Form</p>	<p>You can also see a detail forms of many of the fields (columns) for a selected task by doing the following:</p> <p><i>In Grid view</i> you can click the little circle on the right of the task name to see the details view of many of the columns of data ordinarily seen in the grid. You can just view as well as enter data through the card about the task.</p> <p><i>In Timeline view</i> if you click the Gantt bar on the right it opens a card where you can see and add all the information that you would normally see in the Grid view for the task. You can just view as well as enter data through the card about the task.</p> <p>Eg you could enter e.g. 60 hours of effort. And yet by entering hours, duration is calculated so long as one or more individuals are assigned to the task. Thus Duration and Effort normally rise and fall together.</p>
<p>ESTABLISHING & ASSIGNING MEMBERS</p>	
<p>Establishing Members (Resources)</p>	<p>To use team members in a project, you need to first attach the project to an Microsoft 365 Group. Once the group is established and attached to the current project, you will be able to assign any of the group members to individual tasks.</p> <p>Working with Groups To attach the current project to a group, click the Group members choice in the upper right of the project. And then either select an existing group (with its members) or create a new group (and adding members). Here’s how to do each:</p> <p>--Connect Project to an Existing Group To connect the project to an <i>existing</i> group, click Group members in upper right</p>

	<p>and then select the desired group of members to utilize in the project. Then when you go to the Assigned to column for a task you will see a pop-up list of team members that you can choose from for the task.</p> <p>--Create a New Group To create a new group click Group members in upper right and then select Create a group. Give the group a name, and then enter the members for that group. (Members that appear will have a Microsoft 365 account appear for selection in the list.)</p> <p>NOTES: a member can belong to one or more groups.</p>
Assign Resources from Group to Individual Tasks	<p>Once the project has been associated with a group and its members (see above for explanation), you can assign the resources from the group to individual tasks.</p> <p>-Click anywhere in a task.</p> <p>-In the Assigned to column for a task, select the person icon.</p> <p>-Choose a member from the list of people in a group, or enter text to search for the member.</p> <p>If the person is not in a group, you can assign the person to the existing group (or you can create a new group and assign them to it.)</p>
Assign a Task to a Non-User Resource	<p>You can assign a task to a non-user resource (for example, equipment you need for the task, a contractor who is not a part of your org, a conference room, etc.). As long as they are available as resources in your organization, they can be assigned to a task. Note that they do not need to be added to the project's Microsoft 365 group in order to be assigned to a task.</p>
Effort Driven Scheduling	<p>By default all tasks are effort driven, meaning that as you add more resources to a task, the duration will decrease. In future we may see a choice to turn off effort driven scheduling.</p>
COMPLETING TASKS	
Mark Tasks Duration or Effort Complete	<p>You can mark individual tasks fully complete or partially complete, in terms of % of Duration or as number of hours of work Effort..</p> <p>-Mark a task 100% complete by selecting the circle to the left of a task name to add a checkmark. Or in Task or in Details form, enter percent in % complete field (e.g. 50%).</p> <p>-You can also make completions in terms of work Effort, by entering the number of hours completed in the Detail area. (eg 40 hours).</p>
WORKING WITH BOARD VIEW	
Introduction	<p>Board view always you to arrange tasks in ways other than a list or timeline. Eg you might want to make the project agile and focus on key tasks that you want to concentrate on. <u>Note</u> that changing the order in Board view does not alter the Grid and Timeline views.</p> <p>-Switch to Board view by clicking Board at the top of the page. All of the tasks appear under Bucket1.</p>
Change Grouping within Board View	<p>Groupings of Tasks You can change how the tasks are grouped by clicking Group By in the upper</p>

	<p>right of the project, and select Progress, Finish Date, and Bucket. Tasks are put into those groups and sorted. Eg if you selected Progress, then you see the tasks in three groupings – Not Started, In Progress, Completed.</p> <p>Group by Buckets You can also group by a Bucket. A bucket can be anything you want it to be. Eg you can have an Important Tasks bucket, a Less Important Tasks bucket, etc. and then move tasks between these two bucket headings.</p> <p>-When you switch from Grid or Timeline to Board view, the tasks are in order by Bucket1, as all tasks by default are given that bucket designation.</p> <p>-You can change that name Bucket 1 to something different, eg Important Tasks. You can then make another bucket by clicking Add Bucket and (eg) name it Less Important. Now you can move tasks around under the bucket heading designation for each task.</p> <p>Add as many buckets as you like to the Board view. (Eg add My Own Tasks vs Others' Tasks.)</p> <p><u>Note:</u> As data changes in Grid and Timeline view, it will update the tasks in the Board view with its bucket designations.</p>
<p>Manage Tasks in Board View</p>	<p>You can do many of the things in Board view that you do in Grid and Timeline views. Eg: Create a New Task, Enter Start date, Add a Dependency, Mark tasks Complete, etc.</p> <p>-<u>Note:</u> for any task you can click on the Task name to open Details card where you can enter all sorts of information for the task. You can also add notes for the task in this screen.</p>
<p>FILTERING</p>	
<p>Overview</p>	<p>As a projects grow, it becomes more important to be able to quickly find whichever task you need right now. You have granular control of task filtering in Project for the Web. Tasks in Grid, Timeline, or Board view can now be filtered by:</p> <ul style="list-style-type: none"> • Keyword • Finish Date • Progress • Bucket • Assigned to <p>To filter your tasks, simply press the Filters button on the top right within a project (in any view), and select the filters you'd like to apply in the Filter Tasks pane.</p>
<p>CRITICAL PATH</p>	
<p>Overview</p>	<p>Background -- When you're working on a project, it's important to understand how your different tasks affect when your project will end (the project finish date), so you can reach your important deadlines. The critical path of your project is the series of tasks (or sometimes just one task) that defines the finish date of your project. Project for the Web allows users with Plan 3 and Plan 5 licenses to view their project's critical paths on the Timeline view.</p>

Viewing Critical Path -- If you are a Project user with a Plan 3 or Plan 5 license, you can see the critical path by going to **Timeline>Filters**.

CUSTOM FIELDS

Overview

You can create a type of custom field that allows you to quickly choose from several options. Choice custom fields are great for scenarios such as having a Risk column with "High", "Medium", and "Low" values. Also, try using them for rough planning of tasks such as "This week", "Next Week", and "Later". Like other custom fields, you can use them in the Grid, in the Board view, and in the task details card.

To Create:

Click the "Add column" button and choose the "New field" option.

Then, select the "Choice" field type.

Now give your field a name and a set of options. Press the delete icon next to a choice and the *Add a Choice* button at the bottom to manage the number of choices you would like to have. You can use the handle on the left side to reorder the choices. You can also use Ctrl + Up/Down on Windows, or Command + Up/Down on Mac to reorder choices with your keyboard.

IMPORT PROJECT DESKTOP FILES

Overview

You can import any .mpp files that do not violate [Project for the web limits](#). Once your project has been imported, you will be able to use any of the features currently available in Project for the web. Project for the Web does not have all the same features as Project Desktop. However, it tries to import all relevant information so one can still effectively work on projects.

- *Project:* Your project name and start date will be imported.
- *Tasks:* Your tasks will be imported with the correct hierarchy, start & finish dates, duration, effort, effort completed, and % complete.
- *Dependencies:* All finish-to-start dependencies will be imported.
- *Constraints:* *ASAP, start no earlier than,* and *finish no earlier than* constraints will be imported.
- *Custom Fields:* You can import up to 10 local custom fields from your .mpp file.

To import a Project Desktop file:

1. Go to Project Home (project.microsoft.com)
2. Click the arrow next to the **New blank project** button
3. Click **Import from Project desktop**
4. Select a .mpp file (from Project 2016 or later) that you would like to import
5. Follow the steps outlined by the Import wizard
6. Share and start working on your project!

NOTES:

- *Sharing Capabilities:* Project Desktop does not allow users to share live versions of their projects with their teammates. By importing your .mpp file into Project for the Web, you can share it with any of your Microsoft Groups.
- *Editing vs Viewing Capabilities:* People with Project licenses will have full access to edit these projects, while people with Office 365 licenses will be able to view your project in a read only view.)
- *Power BI Reporting:* Use PowerBI to create live reports that pull data directly from your projects. Share these reports with project stakeholders so they can have a live view of what your team is working on.
- *Archiving Old files:* Import your old project files so you can have all your Project information in one place & easily find all your old projects. (ep)

E-MAIL NOTIFICATIONS

Overview

Email notifications are available for you to connect directly with coworkers on the work that is being tracked in Project. The project's team members will get a notification once they have been assigned a task or have been added to a project.

To turn on e-mail notifications:

1. To reach the Project Home, type **project.microsoft.com** in the Search box of your browser.
2. Click the **Settings** icon in the top right corner of the page.
3. Click the **Notifications Settings** link.
4. Select the notification settings you want.
5. Click the **Done** button.

Example Scenarios to Try

Assign a task:

1. In an existing shared project, create a task and assign it to one of your teammates.
2. Within 10 seconds, your teammate should receive an email with links to take them directly to the project or assigned task.

Create a new project they are members of:

1. Create a project normally in Project Home, and assign a group to the project.
2. Group members should get an email within 10 seconds, notifying them that they've been added to a new group. They can use the link in the email to directly open the project.

SHARING PROJECTS IN MICROSOFT TEAMS

overview

You can share the project to the team so they can view and make changes to the project. This includes other project members and others team members who have

	<p>been assigned to tasks.</p> <ul style="list-style-type: none"> -When that team member goes into Project for the Web, they can see the shared project(s) under “Shared with me”. -The sharee can open the project, and start making changes to the project. (Perhaps the sharee can add a note in detail view to explain some of his actions or reasoning.) -Changes by the sharee instantly appears to the sharer if the latter have the project opened to begin with, and vice versa. If the sharer who created the project later opens the project, they will see all updates made by sharee(s). <p>Here is a video that (at this frame) that shows a Project for the Web project opened in Teams, and ensuing interactions</p> <p>https://youtu.be/1TyZCUNYZPE?t=883</p>
<p>Connect Project to Teams</p>	<p>Here are details on how to view a Project for the Web project from within Microsoft Teams.</p> <ul style="list-style-type: none"> -In Project copy the URL for the project in Project for the Web. Then open the Teams app, click Teams on the left. Then under one of the headings below, such as PPN 365, select General line, and then click the “+” sign at the top of the page to add a new channel/tab. Click the Website icon. Enter a name for the project (My Incredible Project), and then paste in the copied URL for the project. Click Save. You will then see the embedded project. <p>Once the project is available in Teams, at any time you can switch to Teams and update the project there, as well as in normal Project for the Web.</p>
<p>Team Conversations</p>	<p>When viewing a Project task inside a Teams tab, users can start a conversation about this task by opening the conversation panel and entering a message.</p> <p>Conversations about tasks are stored in the channel where the project is pinned and are accessible to the entire team through the Posts tab in the channel. All team members can also view the conversation within the context of the Project task by following the link to the task included with the first message of the conversation.</p> <p>Task Conversations allow users to mention teammates to call their attention to a specific task or ask a question. This is done within the natural flow of Teams, so the experience is identical to how you mention colleagues in a chat or channel conversation. When someone is mentioned, they will receive a notification in Teams taking them directly to the task conversation, which also contains a deep link to open the task details within the Project for Teams tab.</p> <p>All the other benefits of Teams conversations are included in task conversations, including support for images, reactions, emojis, and rich text. Users of Project on the Web can easily view or respond to a task conversation in Teams by following a deep link from the task details.</p> <p>Teams conversations for Project tasks are currently only supported for projects in the default org.</p>

<p>CREATE, VIEW, SHARE ROADMAPS</p>	
<p>Intro to Using Roadmap with Project</p>	<p>You can share a roadmap with others so they can see a high level view of projects.</p> <p>Use Roadmap to:</p> <ul style="list-style-type: none"> -Create a view of your organization's projects and drive them together to achieve your business goals. -Connect directly to projects from multiple systems in your organization, allowing each team to use the tools that fit their work style. -Choose the most relevant items from each project to focus on key investments and deliverables. -Change project order to highlight the work that is most important to you. -Monitor progress toward mutual goals by adding top-level key dates that span across projects. -Quickly track status of all phases and milestones to spot problem areas early. -Collaborate with others by sharing your roadmap with an existing Microsoft 365 group, or creating a new set of stakeholders. <p>Overview Video</p>
<p>Create a New Roadmap</p>	<p>With Roadmap you can create a high level view of Projects that others (eg Team or Group members) can view and even alter.</p> <ul style="list-style-type: none"> -In office.com, select the App launcher > All apps > Project to open Project Home. -Select Create new > Roadmap. -Click and name your roadmap. -Now you're ready to add the project info you want to track. <p>Overview of Above - Video</p> <p><i>Detailed Ensuing Steps - Video:</i></p> <p>https://www.youtube.com/watch?v=5WuOhdmT8i0&authuser=0</p>
<p>Share a Roadmap with Members in an Existing Group</p>	<p>You can share a roadmap with people in your organization by using Microsoft 365 groups. You can either share with an existing group that you own, or create a new group from scratch.</p> <ul style="list-style-type: none"> -Select Members, and then Choose an existing group. <p>Note: You can't remove a group from your roadmap once you've selected it.</p>

	<p>-Select the group you want to share the roadmap with.</p> <p>The Members button updates to show how many people have access to your roadmap.</p> <p>Video</p>
Create a New Group to Share the Roadmap With	<p>-Select Members, and then search for and select the members you want.</p> <p>-Select Group settings if you want to add more details about the group.</p> <p>-Select Done to create the group.</p> <p>The Members button updates to show how many people have access to your roadmap.</p>
Notify the Group the Roadmap is Available	<p>Send them the URL of the roadmap.</p>

PROJECT ACCELERATOR

<p>Introduction (Project Proposals, Issues, Risks, Funding, etc.)</p>	<p>For a lot of people, a project is more than a set of tasks with the team members assigned to work on them. You may need to <u>track issues or risks or a process to decide which projects even get funded.</u> This all can be done by extending Project for the web through Project Accelerator, which builds out these kinds of scenarios for you. Project Accelerator. For more info see:</p> <p>To begin using Accelerator:</p> <p>To see your Project for the Web projects in Project Accelerator, have a project open, then click the icon to the left of Projects button located in the green area in the upper left corner. Then elect Power Apps, then App, then Project. You land on the Home page (you can see it selected on the left). To see all of the projects in Accelerator, click Projects on the left. You see all of your projects listed.</p> <p>You can then select and open it in edit mode, and then make use of Accelerator features. First you can click Summary tab Suto see a detailed overview of the project.</p> <p>(here is a video for the above items)</p> <p>https://www.youtube.com/watch?v=F83ZHbxrGfg&t=217s</p> <p>Using the main Features</p> <p>Here is a brief explanation of each of these main features of Accelerator for Project for the Web:</p> <p>Proposals</p> <p>No one has enough time or resources to pursue every great idea. Through project requests, you can gather a set of information to help you decide which requests get funded and turned into projects. Take this to the next level by integrating your process with Power Automate.</p> <p>Programs</p> <p>As you run more projects, it is ideal to be able to organize them into programs so</p>
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you can easily step back and see the bigger picture.

Risks

With any project, there are risks that need to be tracked so you can prepare in advance to either avoid or deal with them.

Issues

Anyone in project management knows that issues come up as a project progresses – maybe the weather isn't favorable or maybe something disrupts the supply chain. Whatever it is, you want to track the issue, know who is driving the mitigation, and clearly see the next steps.

Changes

As projects progress, there are going to be changes such as scope, design, or maybe an outcome of an issue mitigation. Tracking that change is key so everyone can look back and understand the history of the project.

Status

As your project progresses, you want to routinely update stakeholders on how the project is tracking on key health indicators and even create status reports around what has been accomplished and what's up next.

Customization

With the accelerator, everything is customizable. See a field that isn't relevant to you? Remove it! Want a different set of choices for fields like Strategic Alignment? Great! Change them! Most changes don't even involve writing code. Just go into the Power App, update the tables, update the forms, and voila! your changes are live.

POWER BI VISUAL REPORTS

Detailed Explanation of Each Report

A nine-tab Power BI report system can be installed with Project for the Web. There are nine reports, accessible from the tabs at the bottom of the page.. The first three show a high level of the status of projects. The next two have a Resource focus. The last four go down to the task level assignments for individuals.**(How to Access?)**

Portfolio Dashboard – Shows all of your projects in your portfolio, and gives a high-level view of the status of your projects. You can view and filter by progress (donut chart). You can see and filter the effort for each project (column chart). You can also view and filter by project manager (pie chart), etc. Also, we can use the filter pane.

-We can also select a project in the table below, which will cause The other charts to adjust.

-We can also link back to the project itself in Project fort the Web by clicking on

the link icon for a project.

-We can also further filter the projects we are looking for from the pane on the right. (eg filter just for projects that are overdue)

Portfolio Timeline – Shows all of the projects in a nice timeline visual. We can filter by project manager or project progress located at the top of the page. And you drag the levers at the top middle of the page to choose a specific time period. You can mouse over the bars to get more information.

Portfolio Milestones – Shows milestone we have or should have finished for last 30 days, and what is upcoming in next 30 days. We can also see the status of the milestones (late, on track, overdue, future etc.) from the colored icons on the left. We can also filter the donut charts on the right for individual projects.

Resource Dashboard – Focuses on resources and the tasks and projects they are doing. You can filter by Progress, Status, Resource at the top of the page. The cards on the left show the key data for that which we have filtered for. If we hover over the tasks by status pie chart we can see how many tasks there overdue by project. If you select an individual in the donut chart, you see the status for that person.

Resource Assignments – This goes one level deeper, showing task assignments for all people in the organization. Eg click a resource at the top right of the screen, you can see that person's total amount of work, the projects he is working on, and expand down the list list at the bottom to see the tasks. The table shows start and finish dates, progress, effort (work), effort completed, and effort remaining. At the top of the page you can filter for tasks in progress or not started.

Task Overview – Helps us see task “exceptions” You see in the table below a sorted listing of tasks – from those that are overdue, are late, etc. We can sort the table on any of the columns. Eg we can see the task with the most work remaining by sorting on that columns. The pie chart and tree map both show across the Buckets of a project. We can drill down by right clicking a box on the tree map to see to see the *tasks* by project and bucket; as well as the *effort* by project and bucket.

Project Timeline Report – Similar to Portfolio Timeline Report, except this goes down to the task level for an individual project, or looking across projects. And we can see the detail status of individual tasks.

My Work – Targets work for one or more individuals. It is a way for a team member to see their own work or a manager to see what their team is working on. This view is similar to what we saw for Task Overview, but here from a resource perspective.

My Timeline Report – It is likewise a personal timeline view for individuals or a team of people. It looks across all projects, filtered for the work for a particular timeframe as necessary.