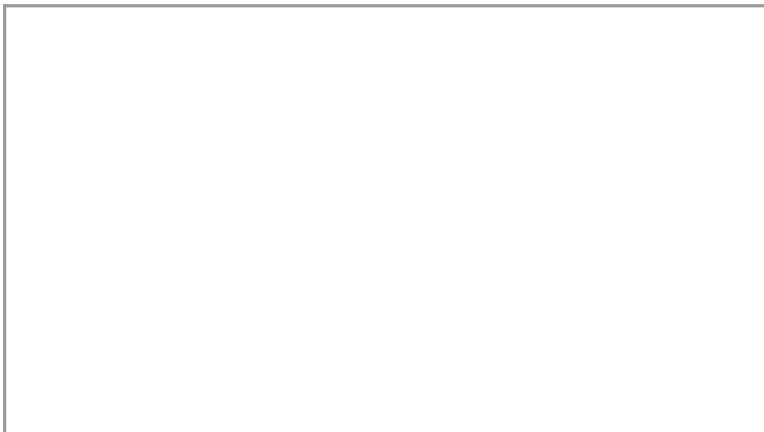


# Task Management

Last Modified on 11/17/2021 10:47 am CST



The main area for task management operations is the **Gantt** section of the project record.

**Note** If the Gantt is not displaying updates you made to underlying data, click the **Refresh** button in the Gantt ribbon.

Task Information Tabs

## Task Information

To make edits to an existing task, either single-click next to the task name and then click **Edit** in the menu bar, or double-click in the row of the task in the Gantt section of the window.

### General

- **Task Name:** The given name of the task.
- **Duration:** The number of days between the Current Start and Current Finish dates. When dates are updated in the Task record, the Duration will be automatically calculated upon saving the task. When Duration is updated in the Task record, the Finish Date will be automatically calculated upon saving the task.
- **Current Start and Current Finish:** The Start and Finish dates entered at the time of task edit, or that were automatically set through a dependency.  
**Note:** Task dates can be changed by dragging the left, center, or right part of the date bar and dragging.
- **Current Finish:** The finish date entered at the time of task edit, or that was automatically set through a dependency.
- **Target Start and Target Finish:** The target dates entered manually, or automatically entered when the project was last baselined. See section **Baseline the Schedule** below.
- **Percent Complete:** Add an estimated Percent Complete - this will be part of the algorithm used to automatically calculate the task's parent (summary) task's overall percent complete.
- **ID:** System generated value, not editable.

### Dependency

Add a task dependency (aka Predecessor) from the dropdown **Name** list, and set the dependency **Type** and any

necessary **Offset** days.

## Dependency Types:

- **Finish-Start:** The predecessor task must be completed before the successor task can start.
- **Start-Start:** The successor task cannot begin until the predecessor task begins.
- **Finish-Finish:** The successor task cannot be completed until the predecessor task is completed.
- **Start-Finish:** The successor task cannot be completed until the predecessor task begins.

## Resources

Choose one or more resources and set their **Unit** value for the assignment. If the **Unit** value is set to greater than 100, upon **Save** the value will revert to 100.

## Task Details

- **Task Type:** Choose the relevant Task Type from the drop-down:
  - **Task:** The lowest level piece of work that needs to be completed.
  - **Stage:** Configures the task as a Stage which will automatically get added to the **Stages** section of the project. Use the **Stage** designation when creating a parent task for indented child tasks.
  - **Deliverable:** If a task is set to the **Deliverable** type, documents can be attached to the task by clicking into its parent stage task in the **Stages** tab, and then clicking on the task name in the **Deliverables** section on the resultant Project Stage form.
- **ID:** System generated value, not editable.

### Indent a Task (Child Task) or Outdent a Task (Parent Task)

To indent or outdent a task, choose the tool at the top of the Gantt, or right-click on the task. Indenting a task will automatically make the task above it a parent task.

### Move Tasks

To move a task simply click to grab the handle on the left side of the task and move the task up or down.

### Change the Date Focus in the Gantt Chart

Prev Time and Next Time will display the previous or next day, week, month, or year, depending on the Zoom level chosen for the Gantt.

### Baseline the Schedule

To baseline the task schedule, click into Project Settings and choose **Reset Target Dates in all Project Tasks**.

You can verify the successful completion of the baseline reset by checking that the task date bar and the colored baseline bar below it are in alignment with one another.

