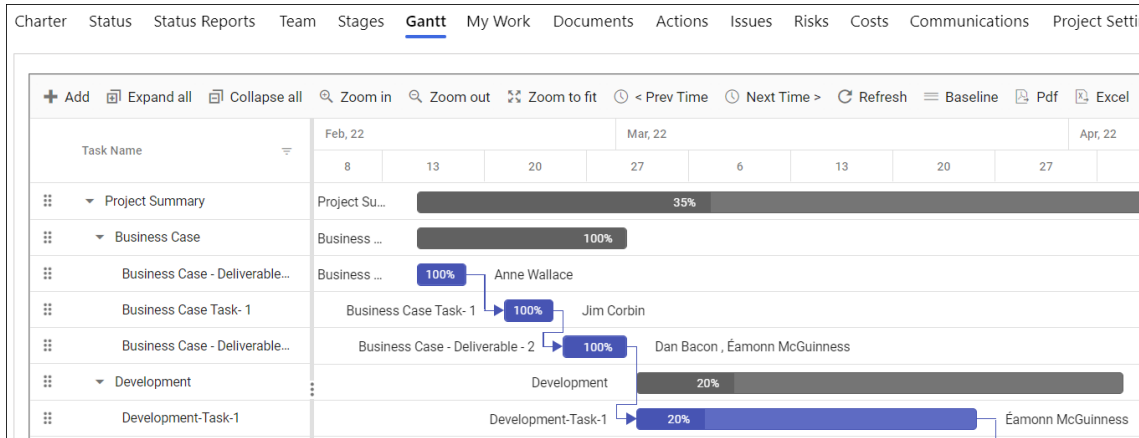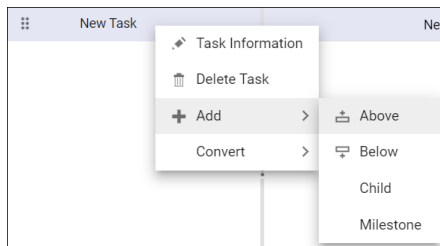# Task Management

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Create a New Task

1. Click into the Gantt tab within a project.
2. You can add a new task in a couple of ways:
    1. In the Gantt menu click + Add.
       Or,
    2. Right-click near an existing task and click + Add and choose from the available options.


3. Fill in the task details as explained in **Gantt Sections** below.

> **Note** There is a technical limit of 1,000 tasks for the Gantt, but in order to have a reasonably responsive Gantt there is likely to be a practical lower limit based on performance in your environment, affected by variables such as the number of dependencies and levels of hierarchy.

Edit a Task

> **Note**
> - If there are concurrent editors of tasks in the same Gantt, the last save will win.
> - In order to see other users' changes to Gantt data, a browser refresh is required.

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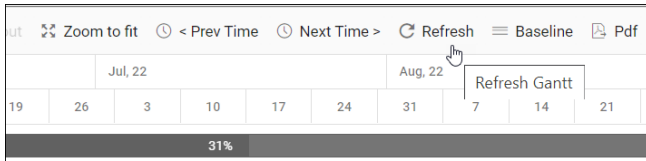

You can also make inline grid edits by dragging the Gantt divider line to the right to expose additional grid columns, and then double-clicking an existing value.

| k Name	Duration	Current Start	Current Fini...	Target Start	Target Finish	Percent Co...	Jul, 22
							13	19
Business Case Task- 1	6 days	8/8/2022	8/15/2022	8/8/2022	8/15/2022	0	
Business Case - Deliverable - 2	22 days	8/16/2022	9/14/2022	8/16/2022	9/14/2022	0	
Development	7 days	9/15/2022	9/23/2022	9/15/2022	9/23/2022	0	
Development-Task-1	5 days	9/15/2022	9/21/2022	9/15/2022	9/21/2022	0	
Development - Deliverable - 1	1 day	9/22/2022	9/22/2022	9/22/2022	9/22/2022	0	
Development - Deliverable-2	1 day	9/23/2022	9/23/2022	9/23/2022	9/23/2022	0	

Additionally, with a right-click on an existing task you can access task-related options.
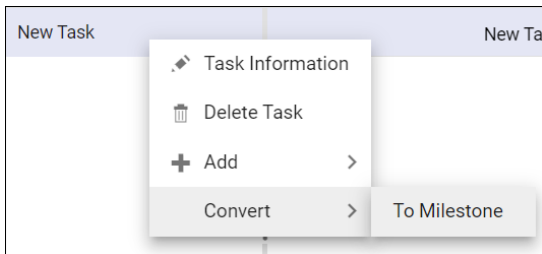
# Gantt Sections

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. The Duration value cannot be less than 0.13 of a Day as the Gantt does not support durations of less than 1 hour.
- 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. Task dates can be changed by dragging the left, center, or right part of the date bar and dragging. Task dates cannot fall on a weekend.
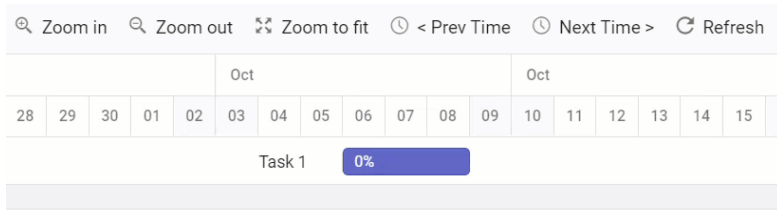
- **Target Start and Target Finish:** The target dates entered manually, or automatically entered when the project was last baselined. See section **Baseline the Schedule** below.
- **Percent Complete:** Add an estimated Percent Complete - this will be part of the algorithm used to automatically calculate the task's parent (summary task) overall percent complete. The Percent Complete value can also be set in the left-side grid portion of the Gantt, as well as in the Gantt Chart section by dragging the Percent Complete bar (it cannot be set from within work reports).
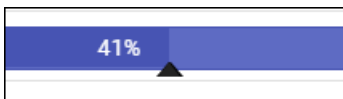
- **ID:** System generated value, not editable.

> **Note**
> - User entered dates will be saved as time zone independent UTC dates, not user local dates; the same dates will be displayed for all users irrespective of time zone.
> - The date format displayed in the Gantt uses the format specified in the logged in user's personal options settings.

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 to be assigned to the task.

The **Resources** list of users is limited to users given the **BrightWork Team Member** security role.

> **Note**
> - If the user assigning the resource does not have sufficient privileges, the assignment will not be saved.
> - The Resource **Unit** value will revert back to 100 if changed.

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** tab of the project. Use the Stage designation when creating a parent task for indented child tasks. It is recommended to match the Gantt stage names with the stages of the project's Business Process Flow.

Documents can be added directly to a stage by clicking into the **Stages** tab, clicking on the stage name, clicking on the **Related** tab, and then clicking **Documents**.
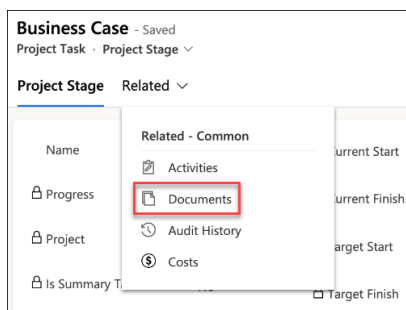
  - **Deliverable:** If a task is set to the **Deliverable** task type, documents can be attached to the task by clicking into its parent stage in the **Stages** tab, clicking on the task name in the **Deliverables** section on the displayed Project Stage form, and then choosing to create a new document or upload an existing document.

> **Note** We do not support adding a new task with the **+ New Project Task** option found on the **Project Stage** form.
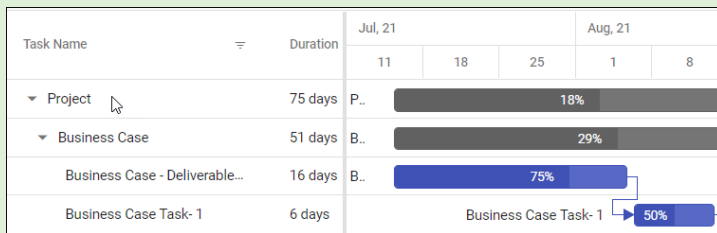
- **ID:** System generated value, not editable.

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

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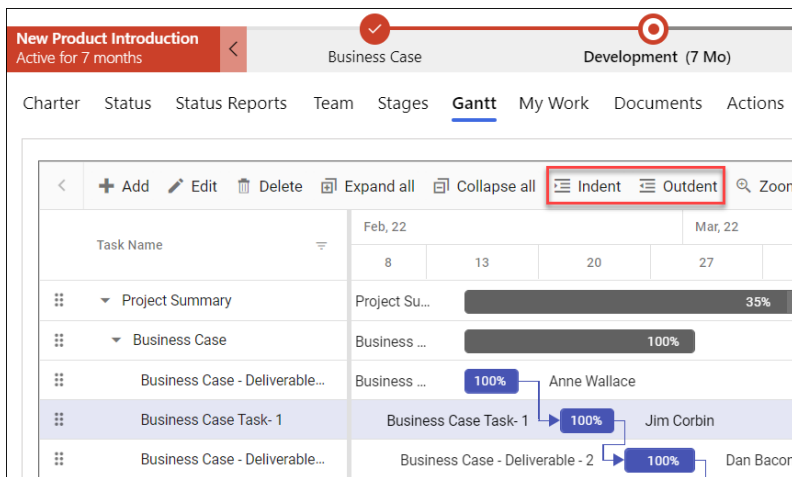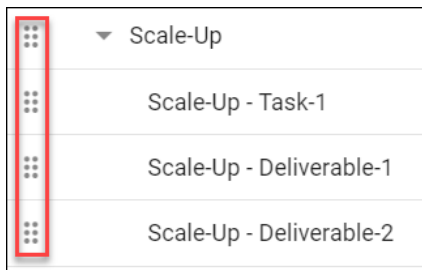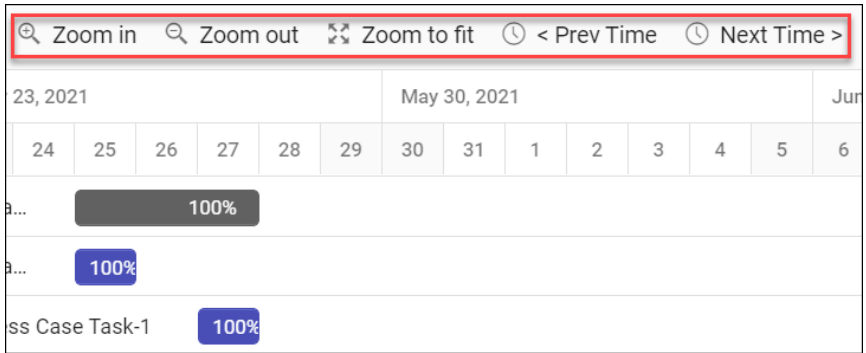
Move Tasks

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.

The following zoom options are available in the Gantt toolbar:

- Zoom In - To perform zoom in action on Gantt timeline.
- Zoom Out - To perform zoom out action on Gantt timeline.
- Zoom To Fit - To show all tasks with timeline fit into the available chart width.

Baseline the Schedule

To baseline the task schedule, click into Project Settings and choose **Reset Target Dates in all Project Tasks**.
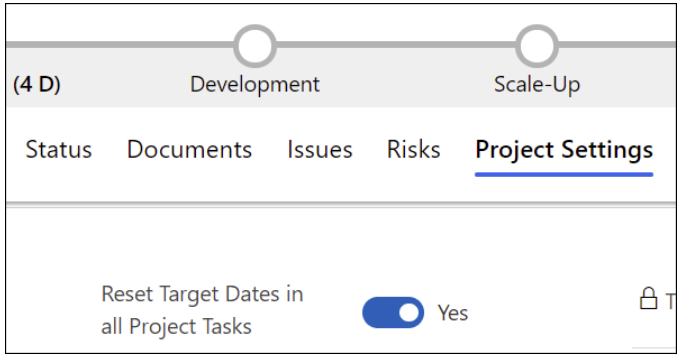
You can verify the successful completion of the baseline reset by checking that the task date bar and the colored baseline bar below it are in alignment with one another.
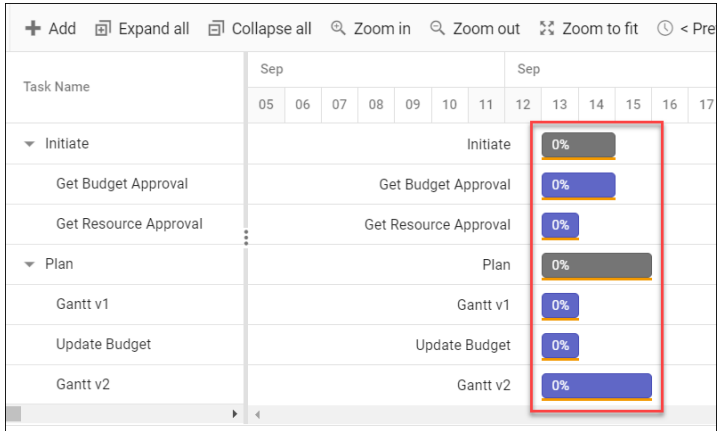
Gantt Chart Keyboard Navigation

The below table lists Gantt keyboard navigation shortcuts. For best results, click on the timeline side of the screen (right-side) prior to using the navigation shortcuts. Certain keys will not work in older versions of BrightWork 365.

Keys	Description
Home	First Row Selection
End	Last Row Selection
DownArrow	Move Row Selection Down
UpArrow	Move Row Selection Up
Ctrl + UpArrow	Collapse All
Ctrl + DownArrow	Expand All
Ctrl + Shift + UpArrow	Collapse Row
Ctrl + Shift + DownArrow	Expand Row
Enter	Save Request
Esc	Cancel Request
Insert	Add Record
Ctrl + Insert	Add Record By Dialog
Ctrl + F2	Edit Record By Dialog
Delete	Delete Row
Ctrl + Shift + F	Focus Search TextBox
Shift + F5	Focus Task

Troubleshooting

Duplicate Task

If a task is manually created immediately after a project first gets created, this can occasionally result in the creation of a duplicate task.

Gantt Row Display

- When your browser display zoom is set to a value below 100% you may notice the task names not aligning with their corresponding Gantt bars when scrolling vertically. Setting the browser display zoom to 100% fixes this issue.

Deliverables

- If you change a **Deliverable** type task into a task of a different type (**Stage** or **Task**), in order to view any documents that were attached to the original deliverable you will need to temporarily change the task type back to **Deliverable** so you may once again have access to the document. When done saving the document you can change the task type again as desired.

- If you change a **Stage** type task into a **Deliverable** type task, this new Deliverable will not automatically attach itself to its parent Stage. You will not be able to view this deliverable within its parent stage until you make an update to the Deliverable beyond changing the task type, such as updating its name or one of the date field values.

Gantt Baseline Resets and Milestone Dates

After a Gantt baseline reset, the Target Date values of milestone tasks may not equal Current Date values. We are working on a resolution.

Right-Click "Task Information" Does Not Display Information

After right-clicking on a task row and selecting **Task Information**, no information is displayed.

Workaround

Double-click the task row on the Gantt chart side (right side) of the Gantt window to display the Task Information screen.