Gantt Chart & Task Management

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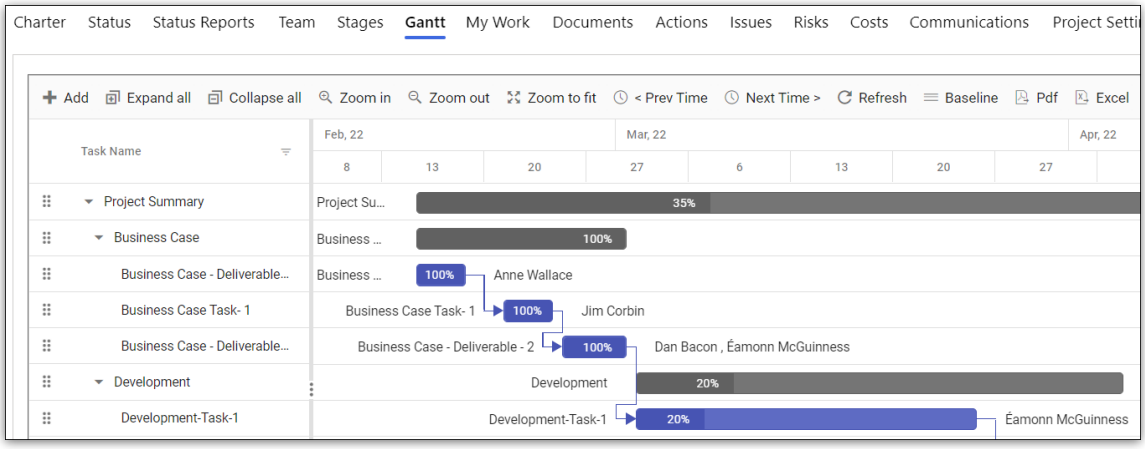

Project Management Context

Planning a project prior to completing the build out of tasks in the Gantt will pay dividends throughout the full duration of the project. Planning is a team sport, and gaining input and understanding from the larger project team will be invaluable and avoid the pitfalls present when a project manager tries to complete this crucial process piece on their own.

The final set of Gantt tasks should be a combination of high-level stages or summary tasks that are broken down into smaller child work items with their own start and finish dates, with team members assigned to the work. As the project execution progresses, you'll be able to track any gaps between the originally planned task dates and their actual dates and make adjustments along the way as necessary.

Create a Gantt Task

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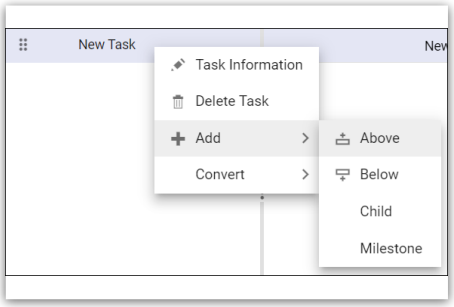
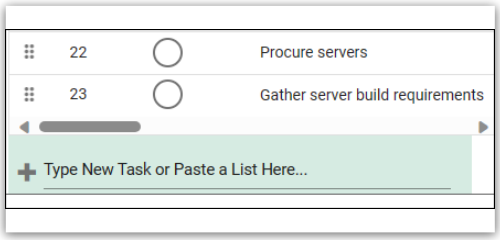
Note

- Task start and finish dates will be automatically adjusted based on global and project specific calendar settings. See BrightWork 365 Starter Project Templates, Global Settings, and Non-Working Days.
- Adding a new task with the **+ New Project Task** option found on the **Project Stage** form is not supported.

1. Click the Gantt tab within a project.
2. You can add a new task in a few different 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.



      Or,
   3. Use the Quick Add feature at the bottom of the Gantt Grid (not available if the Gantt is sorted or filtered). Type in individual Gantt tasks or paste multiple tasks copied from a column of text created elsewhere (you will be given the option to create the entry as separate tasks or as a single task). Newly added tasks will appear on the bottom of the Gantt and will copy the start date of the prior last task.



Note If you pasted in content and then canceled the option to create the entry as separate tasks, the entry will remain in the Quick Add field. If you then hit

> Enter, the entry will be added as a single task.

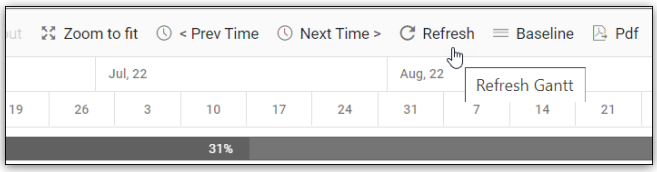
3. Fill in the task details as explained in **Gantt Sections** below.

> **Note**
>
> - When a milestone that is less than 100% complete is a child to a summary task, the summary task in the Gantt will treat the milestone as 100% complete; in other lists the milestone percent complete will be used in calculations using its actual percent complete.
> - Variables affecting Gantt performance include number of tasks (we suggest a limit of 1000 tasks), number of dependencies, and levels of hierarchy.

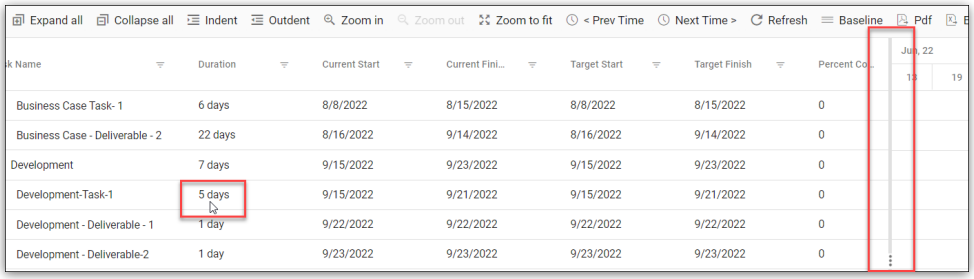
Edit a Gantt Task

> **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.

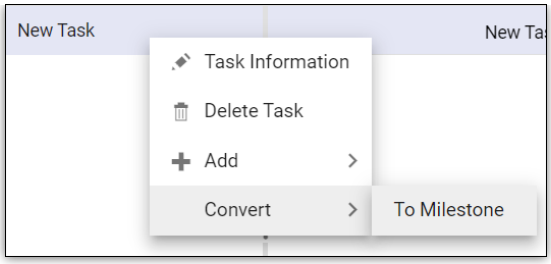
To edit an existing task either single-click next to the task name and then click **Edit** in the menu bar or double-click in the row of the task in the Gantt section of the window. If the Gantt is not displaying updates you made to underlying data, click the **Refresh** button in the Gantt ribbon.



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



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



Multiple tasks in the Gantt can be selected for deletion by holding down the Ctrl key and selecting the relevant tasks. Multi-delete of tasks will not be allowed if the tasks are sorted, filtered, or searched.

To clearly see which tasks are completed and which are not, strikethrough is applied for tasks on the grid and on the Gantt when % Complete is 100; the strikethrough is removed when % Complete is less than 100.

Gantt Task Elements

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GENERAL

Task Name

The given name of the task.

Scheduling Type

> **Tip** **Definitions:**
> - Duration: The number of days required to complete the task.
> - Work: The number of hours required to complete the task.
> - Unit: The percentage of a resource's hours allotted to complete the task.

Tip The project default scheduling type is configured in the Schedule Settings of projects.

Task Type	Changes in Duration	Changes in Work	Changes in Resource Units
Fixed Duration	Work updates	Resource Unit updates	Work updates
Fixed Work	Resource Unit updates	Duration updates	Duration updates
Fixed Unit	Work updates	Duration updates	Duration updates

Scheduling Type Scenarios

Fixed Duration

Setup	Action	Outcome
Duration: 1 day Work: 0 hrs. Resources: 1	Set Work to 8 hrs.	Resource assigned to 8 hrs. of Work
Duration: 1 day Work: 0 hrs. Resources: 1	Set Work to 12 hrs.	Resource set to 150% capacity
Duration: 1 day Work: 8 hrs. Resources: 0	Add resources 1, 2, 3, etc.	Each resource assigned increase Work by 8.00 hrs., but maintains Duration of 1 day

Fixed Work

Setup	Action	Outcome
Duration: 1 day Work: 8 hrs. Resources: 1 at 100%	Set Duration to 2 days	Resource Unit reduces to 50%
Duration: 1 day Work: 8 hrs. Resources: 2 at 50%	Set Duration to 0.5 days	Resource Units increase to 100%
Duration: 0.75 days Work: 18 hrs. Resources: 3 at 100%	Set all resources to 50%	Duration extends to 1.5 days

Fixed Unit

Setup	Action	Outcome
Duration: 1 day Work: 6 hrs. Resources: 1 at 75%	Set Work to 12 hrs.	Duration extends to 2 days

Duration: 1 day Work: 8 hrs. Resources: 2 at 50%	Set Work to 16 hrs.	Duration extends to 2 days
Duration: 2 days Work: 36 hrs. Resources: 3 at 50%, 75%, 100%	Set Duration to 1.5 days	Work reduces to 27 hrs.

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.

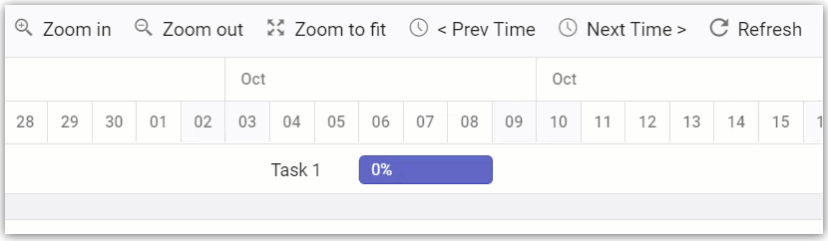
> **Tip** The duration of individual tasks often correlates to a project's overall duration, with long projects having longer tasks than those found in relatively short projects. For example, if you have a project that lasts more than a year, the task durations would typically not be less than a day, making it more practical to track them.

Work

If applicable, enter the number of hours required to complete 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. 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.



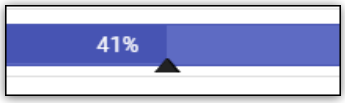
Target Start and Target Finish

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).



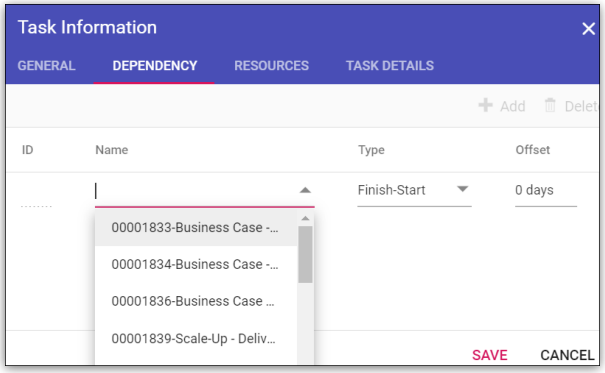
ID

The ID field is a system generated value (not editable) that makes it easier to identify tasks. This field is especially useful to view when creating dependencies between tasks. As a task is moved up or down the ID value will automatically update accordingly.

> **Note**
>
> - When a child task's Percent Complete value is changed, the view will need to be refreshed in order for parent tasks to reflect this change.
> - 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.

> **Note** A successor milestone task that has a Finish-Start relationship with its predecessor will have a Start Date and Finish Date that is equal to the Finish Date of the predecessor.

Caution If a task with dependencies (predecessor or successor tasks) later becomes a summary task, the dependencies will be removed.

RESOURCES

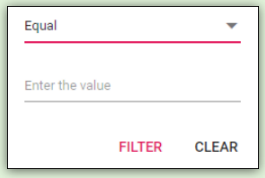
Name

Choose one or more resources to be assigned to the task.

Note

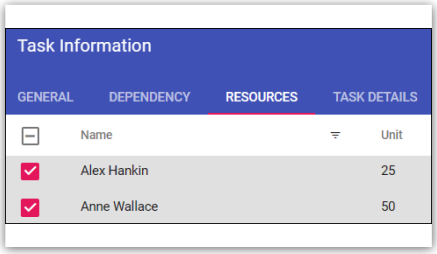
- The list of users in Resources is limited to users given the BrightWork Team Member security role.
- If the user assigning the resource does not have sufficient privileges, the assignment will not be saved.
- Until the task is saved and reopened, changes made in the Resources tab will not be reflected in the General tab, and vice-versa.

Tip To easily view tasks that still require an assignment, on the **Assigned To** grid column use the filter **Equal** and set it to a blank value.



Unit

- Gantt Task Unit percentage values can be set by Team Members and Project Managers to something other than 100% so that project managers can more realistically track resource utilization. This is the percentage of 8 hours a day the resource will be working on the task.



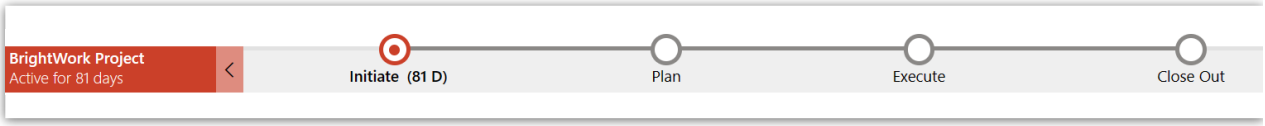
- The task Duration value is affected by the resource Unit value, e.g., a Duration of 5 days will automatically be changed to 10 days if the assigned resource's Unit value is changed from 100 to 50.
- When viewing the Resource Utilization Power BI reports, the Task Unit % for a resource that was entered in the Gantt or Assignment will be applied to the reports, which account for the variation of % utilization. For example, a Monday to Friday task (equal to 40 hours of work), with a Task Unit % of 50 for a resource, will show up as 4 hours per day for 5 days duration for the resource.

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.



- Deliverable: Tasks can be categorized as a Deliverable task type for activity such as the creation of proposals or design documents.

ID

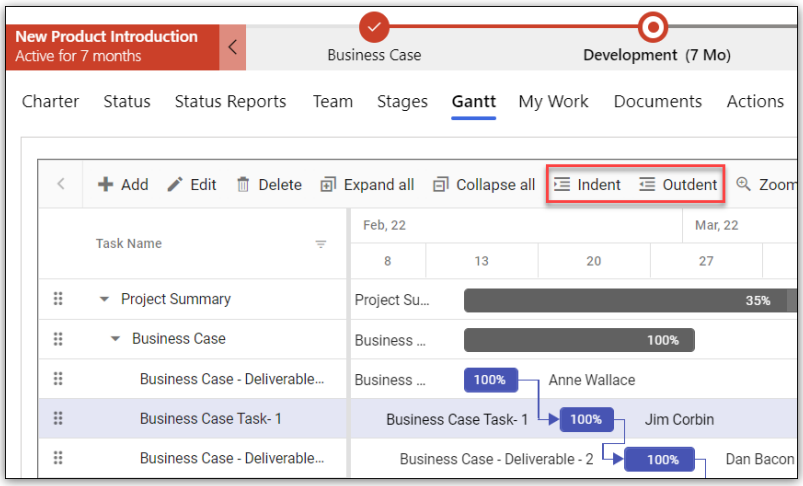
The ID field is a system generated value (not editable) that makes it easier to identify tasks. This field is especially useful to view when creating dependencies between tasks. As a task is moved up or down the ID value will automatically update accordingly.

Description

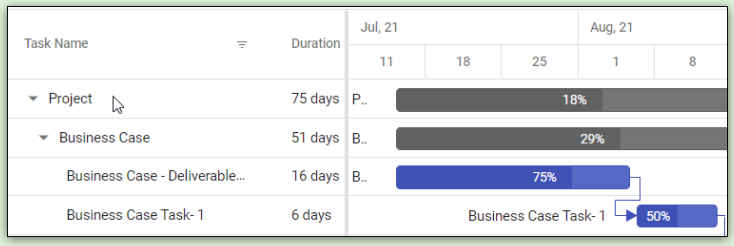
Add description related notes to the task.

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

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.

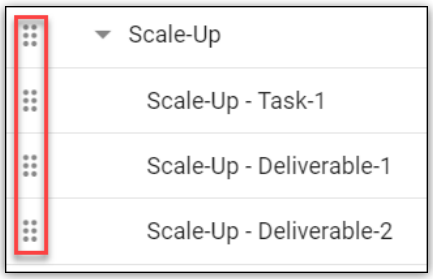


Tip You can get a full rollup of all task data, including overall percent complete, by creating a top-level task and indenting all other tasks underneath it. Note that you will still need to manually enter the **% Complete** value in the **Status** tab of the project.



Move Tasks

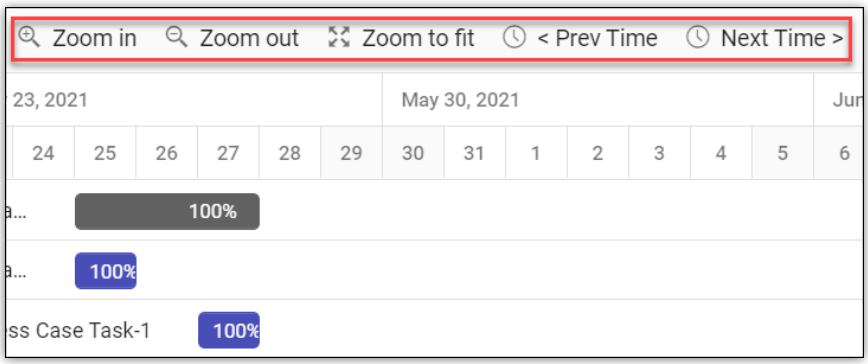
To move a task, mouse click to grab the handle on the left side of the task and then drag and drop the task to a new location.



Note It is not possible to cancel a drag and drop operation once in progress.

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

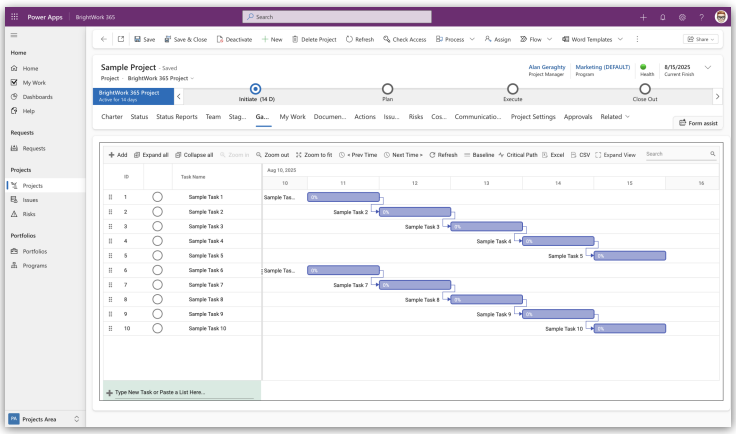
- Zoom In - To perform zoom in action on Gantt timeline.
- Zoom Out - To perform zoom out action on Gantt timeline.
- Zoom To Fit - To show all tasks with timeline fit into the available chart width.

> **Tip** When viewing a project with task dates that well pre-date 'Today', zooming in or out can take the tasks out of focus. To regain focus on these older dates, click **Zoom to fit**.

Gantt View Modes

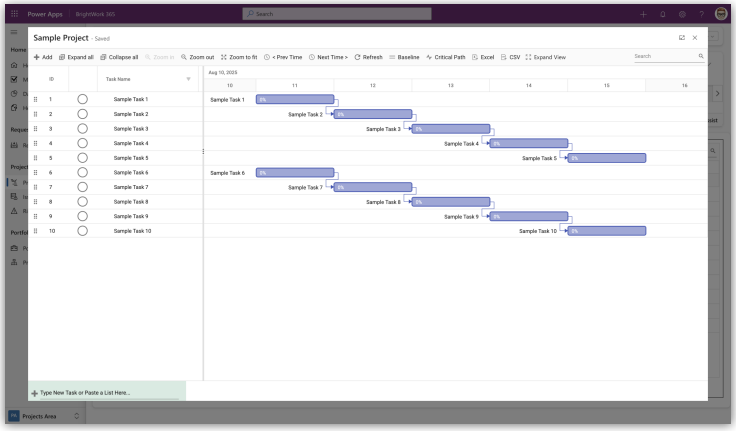
Standard View Mode

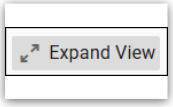
The Gantt is set within a tab that is displayed among the rest of the solution elements.

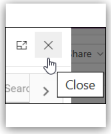


Expanded View Mode

A larger pop-out view of the Gantt.

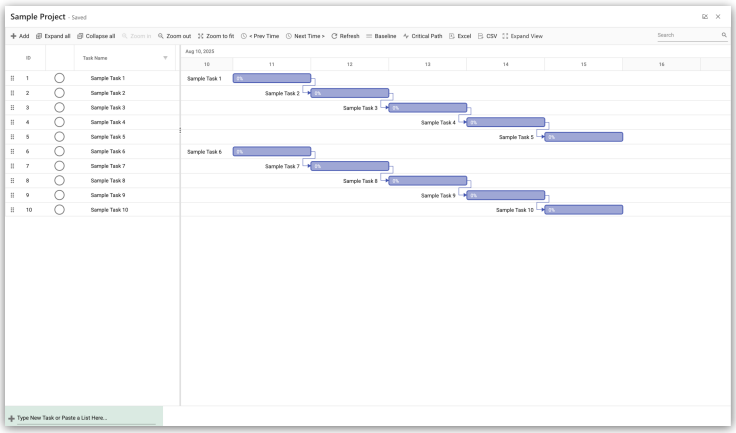


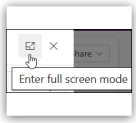
- To enter Expanded view mode, click the Expand View icon 

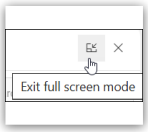
- To exit Expanded view mode, click the Close icon 

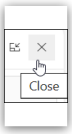
Full Screen View Mode

An even larger view of the Gantt that covers the boundaries of the solution.



- To enter Full Screen view mode, from the Expanded View noted above, click the full screen mode icon 

- To enter back into Expanded view mode, click the Exit full screen mode icon 

- To enter back into Standard view mode, click the Close icon 

Tip You can also use your browser's Full Screen function (typically F11 on your keyboard) to further enlarge any of the screen view modes.

Note The following settings are not maintained between views:
- Highlighted rows.
- Baseline and Critical Path.
- Expand, Collapse, and Zoom.

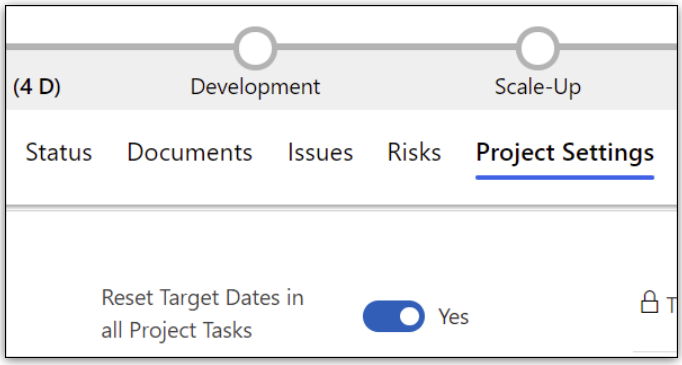
Reset Target Dates in all Project Tasks (Baseline the

Schedule)

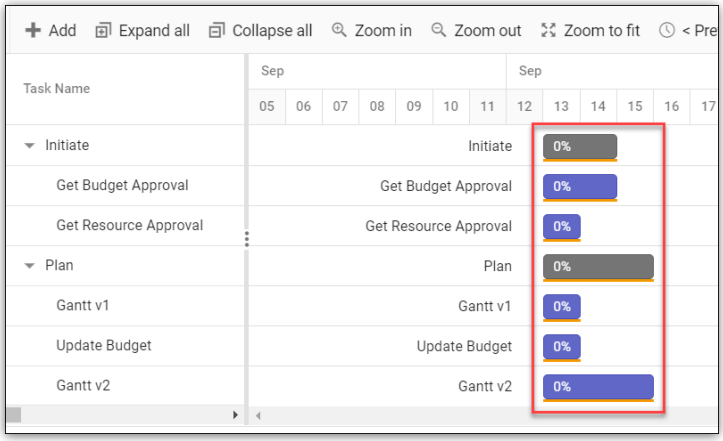
Project Management Context

More often than not, a project's best laid plans do not hold true to plan throughout its execution, regardless of how professional and talented the team may be, or well thought out the plan originally was. Scope change requests come in, costs unexpectedly rise, and humans have human circumstances arise. When any of these mostly unforeseen items occur, there could be an impact to the project's schedule creating an obvious discrepancy between planned and actual schedule finish dates. At some point the impact will be too great to be left unaddressed, and the schedule will need to be updated, usually to the effect of pushing task completion dates further out. After a transparent and full disclosure of all things relevant to this schedule change is made to stakeholders, and with their agreement, the project manager can proceed to reset the target dates of tasks thus eliminating the discrepancy between the planned and actual schedule finish dates.

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.

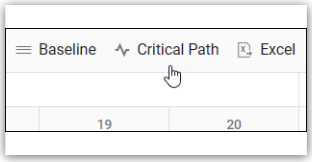


Display the Critical Path of a Project

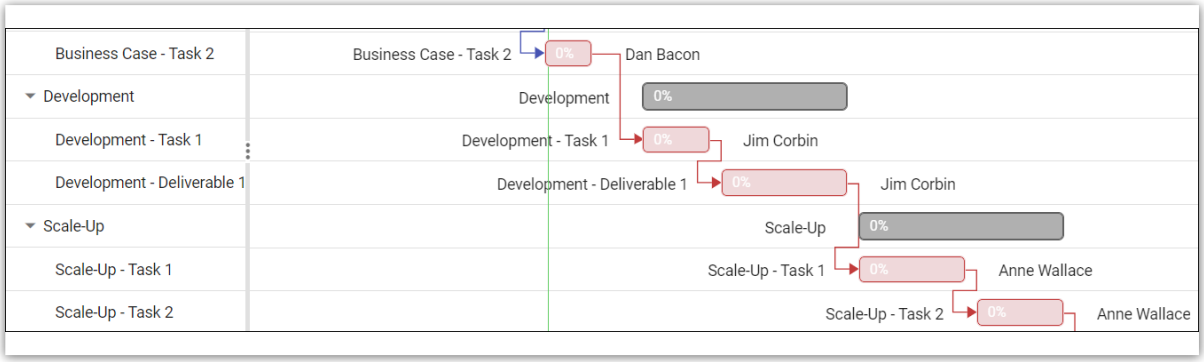
The critical path of a project is the series of linked tasks that have a direct impact on a project's finish date. When the final task in this chain is complete, the entire project is complete. When any task on the critical path is late, the entire project will complete past the planned finish date.

To display the critical path for the tasks entered into the Gantt:

1. Click the project's **Gantt** tab.
2. Click **Critical Path** in the toolbar.



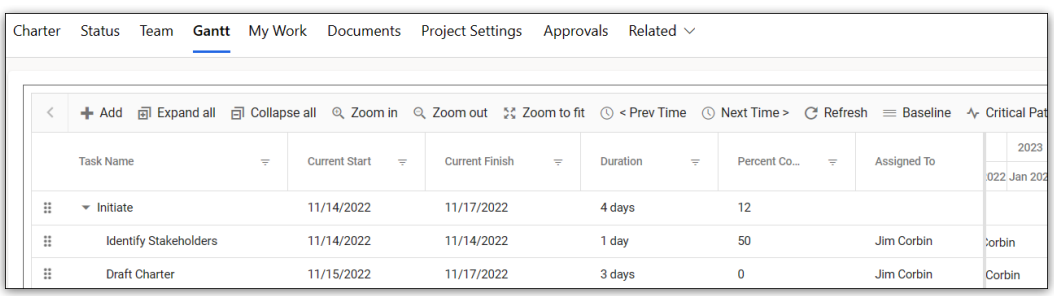
3. The critical path for the project will be highlighted in red.



> **Tip** It is recommended to regularly check the current status of the critical path. As a project moves along through its schedule, the critical path can change as relevant tasks are completed or other previously non-critical tasks are delayed.

Gantt Grid

The Gantt Grid is on the left side of the Gantt tab screen. The Gantt Grid surfaces important task information without clicking into individual tasks and allows for inline editing of task information.

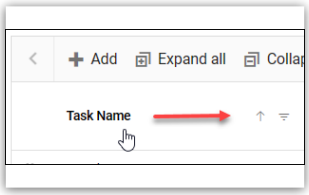


ID: The ID column makes it easier to identify individual tasks, especially when creating

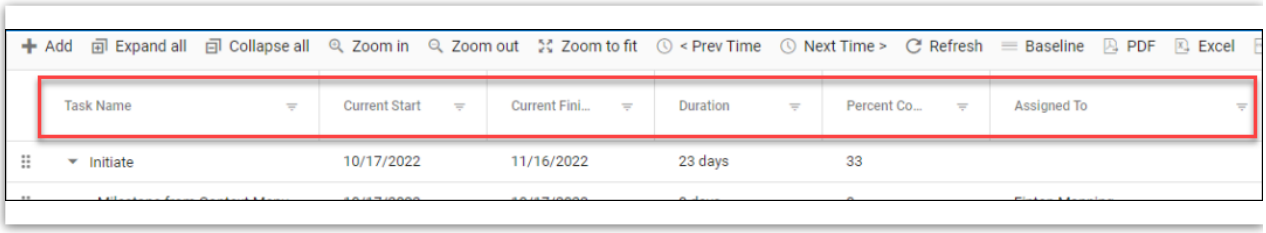
- **ID:** The ID column makes it easier to identify individual tasks, especially when creating dependencies.
- **Mark Complete Action:** This functionality provides single click interaction to mark a task as Complete, or to click the icon again to mark the task as Not Started. If there are multiple assignees, a confirmation dialogue will display prior to marking the task complete.

> **Note** Concurrency is not supported for marking tasks as complete.

- **Assigned To Column:** Easily view and search for task assignees and for tasks that still require an assignment.
- **Sort Gantt Tasks:**You can sort Gantt tasks in ascending or descending order.
  1. Expand the Grid window if necessary, by dragging the Gantt divider line to the right.
  2. Click on the **Task Name** column heading to cycle through sorting ascending, sorting descending, and no sorting.



- **Filter Gantt Tasks:**The columns on the grid side of the Gantt can be filtered to limit the tasks displayed.



- **Search Gantt Tasks:** You can run a search query against the following Gantt Grid columns:
  - Task Name
  - Assignee
  - Dates (Current Start, Current Finish, Target Start, Target Finish)

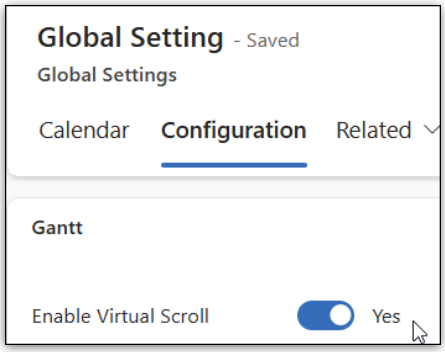
Gantt Chart Keyboard Navigation

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.

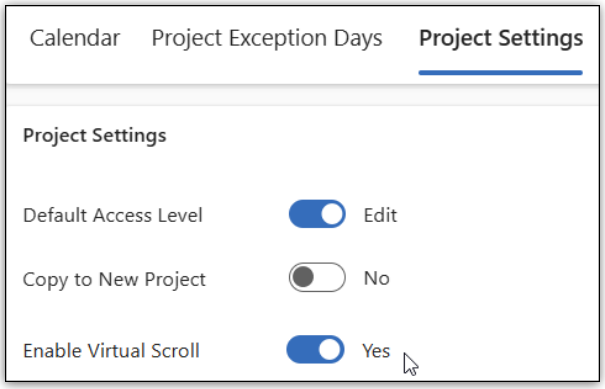
Keys	Description
Home	First Row Selection
DownArrow	Move Row Selection Down
UpArrow	Move Row Selection Up
Ctrl + UpArrow	Collapse All
Ctrl + DownArrow	Expand All
Ctrl + Shift + UpArrow	Collapse Row
Ctrl + Shift + DownArrow	Expand Row
Enter	Save Request
Esc	Cancel Request
Insert	Add Record
Ctrl + Insert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

Virtual Scroll

When enabled, Virtual Scroll enables faster Gantt task editing for projects with very large Gantt task lists. This feature needs to first be enabled for optional use in **Admin Area > Global Settings > Configuration**.



Once enabled for the solution, the project's actual project manager can toggle it on and off at the project level by clicking **Schedule Settings > Project Settings > Enable Virtual Scroll**.



RECOMMENDATIONS

- Expand All tasks at all times. Do not expand or collapse tasks unless necessary.
- Do not use Zoom in or out, only use Zoom to fit.
- When zooming in you may not see the Timeline Gantt and may not be able to scroll horizontally to find tasks.
- To get the most screen space, close 'Copilot' side bar if open and minimize 'Site Map' with the hamburger menu on the top left.
- Do not open dev tools (F12) unless it is undocked.
- Avoid using F11 for full screen.
- It is okay to use the browser zoom if you prefer smaller font to maximize the number of visible tasks; 67% zoom is a good option.
- Reposition the window splitter between the Grid and the Gantt to view more columns in the left side as Grid cells can be edited.

VIRTUAL SCROLL TROUBLESHOOTING

- Some keyboard functions may stop working after scrolling including ‘tab’, arrow up and arrow down. Refresh the Gantt.
- Critical Path action does not work as expected at this time.
- Converting a milestone to a task using context menu does not work at this time.
- Deleting the last task may create a console error. Refresh the Gantt and proceed with delete.
- Console error after sorting. Refresh the Gantt and navigate as normal.
- If item scrolling is not working:
    - Refresh or full Ctrl-F5 refresh if necessary - this will bring you back to the Charter page and will also refresh the Gantt.
    - Ensure zoom to fit is the zoom setting.
- Page may scroll up or down after adding a task. Refresh the Gantt and proceed to the added task manually.
- Delete may fail after editing a task. Refresh the Gantt and delete as normal.
- Selection issues after scrolling. Refresh the Gantt and navigate as normal.

Troubleshooting □