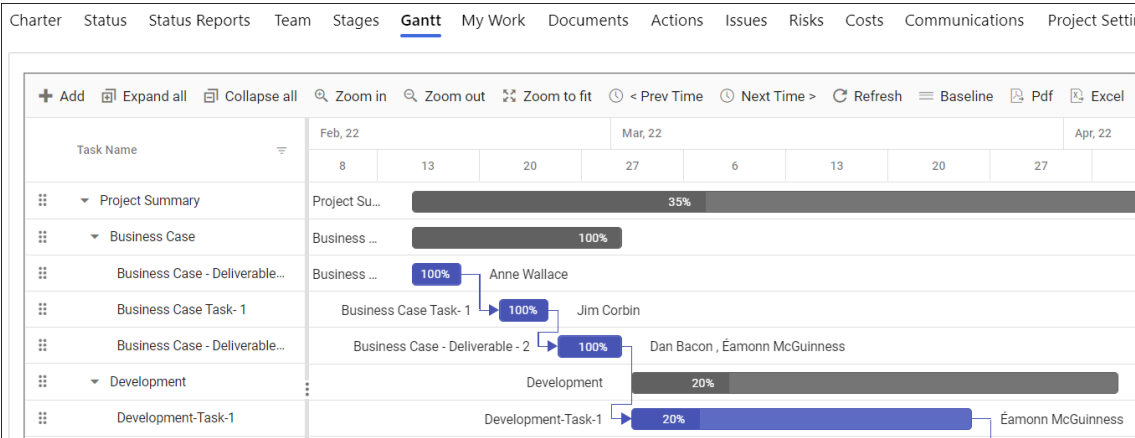


Task Management

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

Overview Demo	Extra Features



Project Management Introduction

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 eventual 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.

Create a New Gantt Task

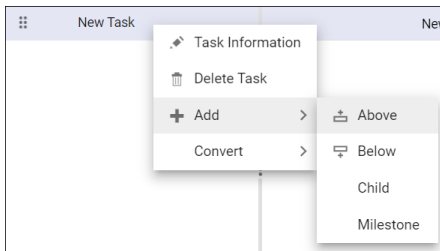
1. Click into the Gantt tab within a project.

2. You can add a new task in a few different ways:

1. In the Gantt menu click + Add.

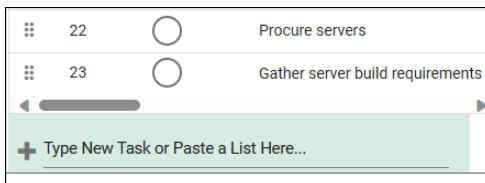
Or,

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 in 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 row of the Gantt and will copy the start date of the 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

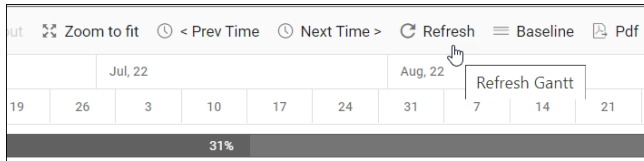
- Task start and finish dates will be automatically adjusted based on global and project specific calendar settings. See [BrightWork 365 Starter Project Templates](#), [Global Calendar Settings](#), and [Non-Working Days](#).
- When a milestone that is less than 100% complete is a child to a summary 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.

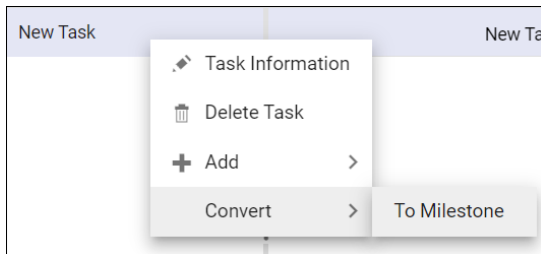


You can also make inline grid edits for certain fields by dragging the Gantt divider line to the right to expose additional grid columns, and then double-clicking an existing value.

The screenshot shows a task grid with columns: Task Name, Duration, Current Start, Current Finish, Target Start, Target Finish, Percent Complete, and a Gantt chart. A red box highlights the '5 days' value in the Duration column for 'Development-Task-1'. Another red box highlights the Gantt chart area, which has been expanded by dragging the divider line to the right. The Gantt chart shows a bar for 'Development-Task-1' from 9/15/2022 to 9/21/2022.

Task Name	Duration	Current Start	Current Finish	Target Start	Target Finish	Percent Complete
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.



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.

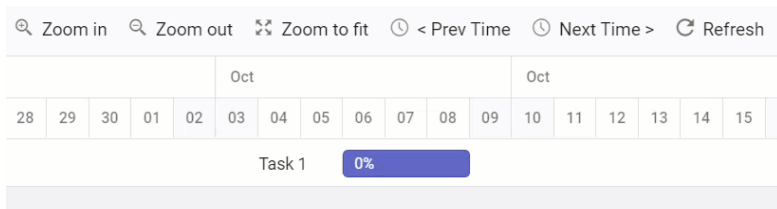
The screenshot shows a task bar for 'Obtain permits'. The bar is blue and has a progress indicator at 100%. The text 'Obtain permits' is displayed on the bar.

Task Name	Progress
Obtain permits	100%

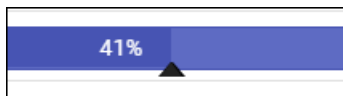
Gantt Sections

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:** 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.

Task Information [X]

GENERAL **DEPENDENCY** RESOURCES TASK DETAILS

[+ Add] [Delete]

ID	Name	Type	Offset
.....		Finish-Start	0 days

00001833-Business Case ...
 00001834-Business Case ...
 00001836-Business Case ...
 00001839-Scale-Up - Deliv...

SAVE CANCEL

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.

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.

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.

Equal

Enter the value

FILTER

CLEAR

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.

Task Information			
GENERAL		DEPENDENCY	TASK DETAILS
Name			Unit
<input checked="" type="checkbox"/>	Alex Hankin		25
<input checked="" type="checkbox"/>	Anne Wallace		50

- 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.



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**.

Business Case - Saved

Project Task · Project Stage

Project Stage Related

Name

Progress

Project

Is Summary Task

Related - Common

Activities

Documents

Audit History

Costs

Current Start

Current Finish

Target Start

Target Finish

- 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.

Initiate - Saved
Project Task - Project Stage

Initiate | Strategic Portfolio | Strategic Program | Project Standard with area of service

Project Stage | Related

Assignee

No data available.

Deliverables

+ New Project Task

Name	Progress	Target Start	Target Finish	Current Start	Current End
Deliverable 1	Not Started	12/13/2021	12/21/2021	12/13/2021	12/21/2021

Deliverable 1 - Saved
Project Task - Project Deliverable

Deliverable 1 | Strategic Portfolio | Strategic Program | Project Standard with area of service

Deliverable | Related

No data available.

Documents

+ New | Upload

Name	File Size	File Type	Author
------	-----------	-----------	--------

Note We do not support adding a new task with the **+ New Project Task** option found on the **Project Stage** form.

- **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 notes to the task.

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.

New Product Introduction
Active for 7 months

Business Case | Development (7 Mo)

Charter | Status | Status Reports | Team | Stages | **Gantt** | My Work | Documents | Actions

+ Add | Edit | Delete | Expand all | Collapse all | Indent | Outdent | Zoom

Task Name	Feb, 22	Mar, 22
Project Summary	8	27
Business Case	13	20
Business Case - Deliverable...	100%	100%
Business Case Task- 1	100%	100%
Business Case - Deliverable...	100%	100%

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.

Task Name	Duration	Jul, 21			Aug, 21	
		11	18	25	1	8
▼ Project	75 days	P.. 18%				
▼ Business Case	51 days	B.. 29%				
Business Case - Deliverable...	16 days	B.. 75%				
Business Case Task- 1	6 days	Business Case Task- 1 50%				

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.

⋮	▼ Scale-Up
⋮	Scale-Up - Task-1
⋮	Scale-Up - Deliverable-1
⋮	Scale-Up - Deliverable-2

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.

🔍 Zoom in 🔍 Zoom out 📐 Zoom to fit ⌂ < Prev Time ⌂ Next Time >														
23, 2021					May 30, 2021					Jun				
24	25	26	27	28	29	30	31	1	2	3	4	5	6	
a...					100%									
a...					100%									
ss Case Task-1					100%									

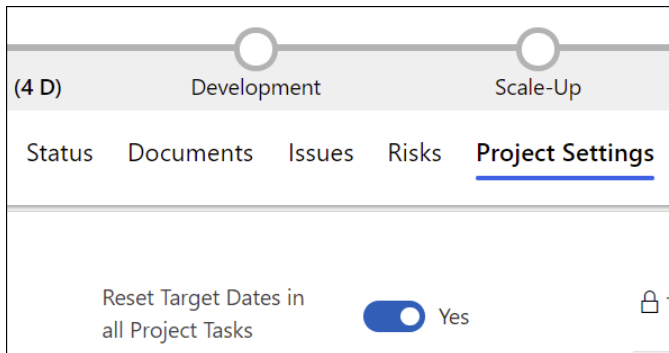
The following zoom options are available in the Gantt toolbar:

- 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.

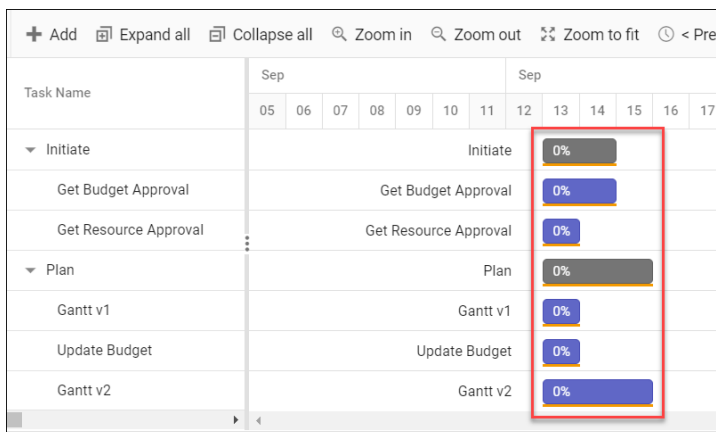
Tip When viewing a project with task dates that well pre-date 'Today', zooming in or out can take the tasks out of focus. To regain focus on these older dates, click **Zoom to fit**.

Reset Target Dates in all Project Tasks (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.



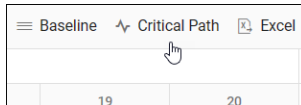
Display the Critical Path of Your Project

The critical path of a project is the series of linked tasks that have a direct impact on a

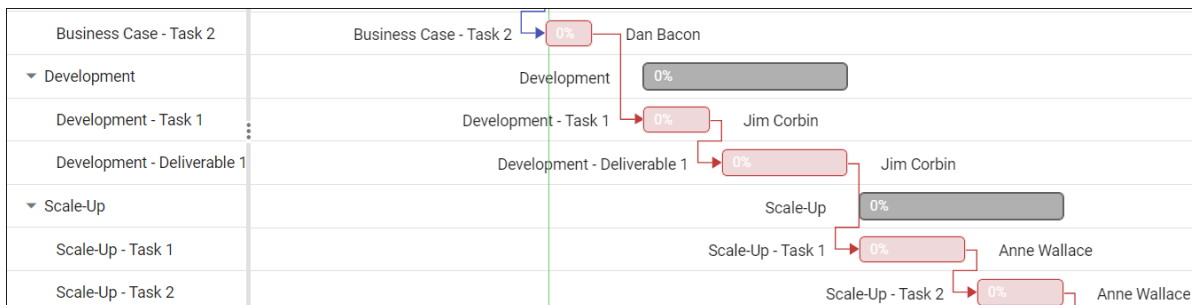
project's finish date. When the final task in this chain is complete, the entire project is complete. When any task on the critical path is late, the entire project will complete past the planned finish date.

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 a good idea 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.

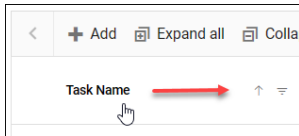
<div> Charter Status Team Gantt My Work Documents Project Settings Approvals Related </div>							
<div> <div> + Add Expand all Collapse all Zoom in Zoom out Zoom to fit < Prev Time Next Time > Refresh Baseline Critical Path </div> </div>							
Task Name	Current Start	Current Finish	Duration	Percent Co...	Assigned To		
Initiate	11/14/2022	11/17/2022	4 days	12			2023
Identify Stakeholders	11/14/2022	11/14/2022	1 day	50	Jim Corbin	Corbin	022 Jan 202
Draft Charter	11/15/2022	11/17/2022	3 days	0	Jim Corbin	Corbin	

- **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.

Task Name	Current Start	Current Finish	Duration	Percent Complete	Assigned To
Initiate	10/17/2022	11/16/2022	23 days	33	

- **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 <u>By</u> Dialog
Ctrl + F2	Edit Record <u>By</u> Dialog
Delete	Delete Row
Ctrl + Shift + F	Focus Search <u>Text</u> Box
Shift + F5	Focus Task

Troubleshooting

Unable to Set a Task Duration Less Than 1

Workaround 1: In the Task dialog:

1. In the Task dialog enter the decimal with a leading 0 i.e., 0.25 (no need for the 'days' text).
2. Click **Save** without tabbing through the dates as this resets the value to 1 day.

Workaround 2: In the Grid:

1. Use the Grid to edit the Duration value on existing Tasks.

Creation of a 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.

New Task Added Between Existing Tasks Instead Gets Added to Bottom of Gantt

This issue can be caused by a user adding a task to the Gantt without refreshing the screen after another user added a task to the same Gantt. To resolve this issue:

1. Drag and drop the newly created task from the bottom of the Gantt to the top of the Gantt.
2. Drag and drop each of the other two tasks to the top of the Gantt Chart.
3. Drag and drop the tasks to the desired positions.

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.

Milestone Gets Added to Incorrect Position

After adding a milestone between two tasks, it may instead be added to the bottom of the Gantt and move again after a Gantt refresh.

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.

Row Highlighting

If a row is highlighted and then another task is collapsed, the row is no longer highlighted. This behavior is inherent to the Gantt Chart.

Vertical Scrolling

When scrolling vertically through the Gantt, a dependency line between tasks occasionally temporarily disappears. This behavior is inherent to the Gantt Chart.

Deleted Tasks Reappear After a Gantt Refresh

There may at times be a delay for the database to be updated after tasks are deleted in the Gantt UI. The deleted tasks will no longer appear in the Gantt upon a subsequent Gantt refresh after the database has been updated a short time later.

Searching for Dates Does Not Yield Any Results

It is not possible to search for date strings.
