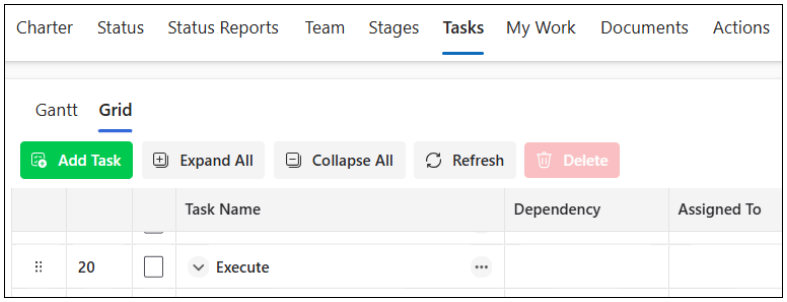
Tasks Grid



Project Management Context

Planning a project prior to completing the build out of tasks 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.

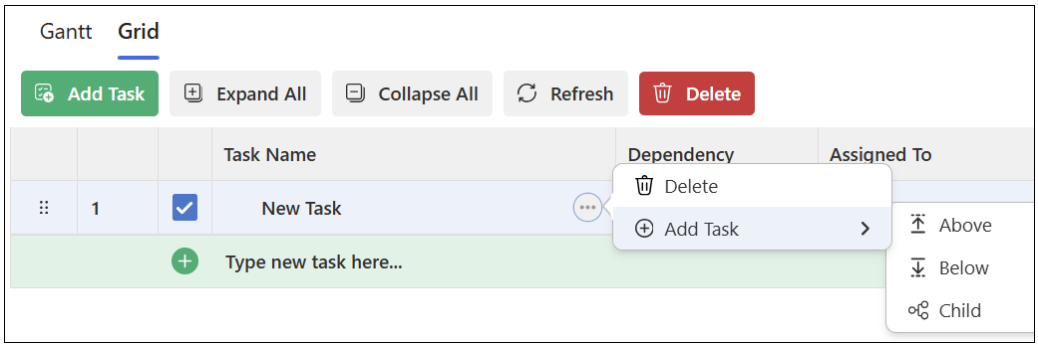
The final set of tasks should be a combination of high-level summary tasks (typically of the **Stage** task type) that are broken down into smaller child work items with their own start and finish dates, with team members assigned to the work. As the project execution progresses, you'll be able to track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

BrightWork 365 makes it easy to plan and execute your project tasks by splitting the management of tasks into two separate, but integrated and synchronized sections: Gantt and Grid. This article focuses on the Grid, which provides a quick and easy method for users to enter project tasks and manage their Work Breakdown Structure independently while synchronizing it with the Gantt.

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.
- Because summary tasks (parent with child tasks) are child rollup tasks, the following values cannot be manually edited: Duration, Start Date, Finish Date, Percent Complete.
- The BrightWork Team Member and higher security roles can Create, Read, Write, and Delete project tasks.

Add Task



Tip New tasks will inherit default field values from the task above them for certain fields, e.g., Duration, Current Start, Current Finish, Work, and Scheduling Type.

Note

- Task names support up to 255 characters.
- 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.

1. Click the **Tasks** tab in a project.
2. Click the **Grid** sub-tab.

You can add a new task in several ways:

- In the Grid toolbar click **Add Task.**
  Or,
- Click the context menu, click **Add Task** and choose one of the available options.
  Or,
- Press the keyboard **Enter** key while editing the last task row to create a new task row.
  Or,
- Use the Create Task Row feature at the bottom of the Grid. Type in individual 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.

Note

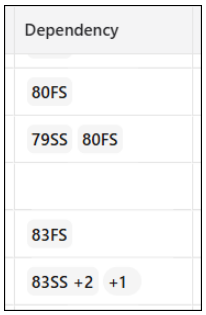
- If you pasted in content and then canceled the option to create the entry as separate tasks, the entry will remain in the Quick Add field. If you then hit the Enter key, the entry will be added as a single task
- With the Create Task Row function, Start Date and Duration inform the End Date.
  - If Duration is hidden, it is still getting applied to the End Date calculation.
  - Duration must be unhidden and updated directly to change the End Date.

Columns

Name

The given name of the task. Task names are limited to 100 characters.

Dependency



The Grid provides a simple, intuitive and quick interface for managing dependencies between tasks. They can be interacted with via inline keyboard inputs or menu-based changes. Dependency updates synchronize with the Gantt.

> **Tip** Hover over Dependency elements to display an extended tooltip.

Double-click the Dependency field to type or double-click the field to choose the dependency icon to expose a drop-down list of tasks. Click the desired dependency task and set the dependency **Type** and any necessary **Offset** days.

Note that dependency functionality is not applicable to summary tasks.

Dependency Type

- **Finish-Start (FS):** The predecessor task must be completed before the successor task can start.
- **Start-Start (SS):** The successor task cannot begin until the predecessor task begins.
- **Finish-Finish (FF):** The successor task cannot be completed until the predecessor task is completed.
- **Start-Finish (SF):** The successor task cannot be completed until the predecessor task begins.

If not specified, the dependency type will default to **Finish-Start (FS)**.

Text Based Inputs

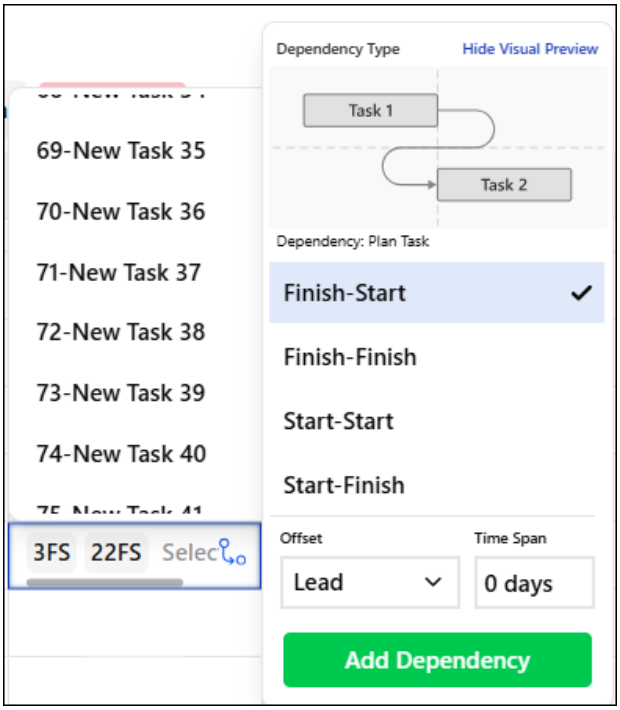


Adding a dependency to the grid can be quickly and easily managed via keyboard inputs. Simply type the task row reference and determine your Start-Finish combination to ensure the dependency begins at exactly the right time. Should you wish to include a lead or lag using this method, it can be added at the end of the task, for example:

1FS + 1 will begin 1 day after the last task finish time.

1FS - 2 will begin 2 days before the last task finish time.

Dependency Menu Interface



Alternatively, you can use the Dependency menu interface to select the task based on row or task name. You will then be able to review the task with a visual preview and determine the start –finish selection and lead or lag via the offset sub menu.

This method will then input the dependency in the Grid in the same manner at Text Based inputs for consistency.

Offsets – Lead and Lag

Lead allows the next task to start x days before the last task finishes

Lag ensures the next task must wait for the last task to finish.

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.
- The Lead and Lag references are noted differently in the Grid vs the Gantt, however, the scheduling result is the same. We will address this display difference in a future release.

Caution If a task with dependencies (predecessor or successor tasks) later becomes a

summary task, the dependencies will be removed.

Scheduling Type

What are task scheduling types?

In project management, Task Types determine how the system calculates the relationship between three key variables: Work, Duration, and Units. The three task scheduling types in BrightWork 365 are: Fixed Duration, Fixed Work, and Fixed Unit.

The core formula governing these is:

*Work = Duration * Units*

When you set a task to a specific type, you are "pinning" one of those variables, so it remains constant even if the other two change.

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.
- The Scheduling Type logic will not update unless all three of Duration, Work and Resource are present in the task.

Relationship Between the Variables

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.

Caution If a Grid task is initially given a Work value of 0% and is later changed to a higher value, the associated changes to the Work and Duration values will not be reflected in the Gantt, and the task will be represented as a milestone in the Gantt.

Assigned To

After double-clicking into the Assigned To column, select and assign one or more users to a task with specified individual Resource Unit work allocations, so you can efficiently and accurately distribute work and ensure clear ownership. Set precise commitment percentages across multiple resources. The ‘Assigned To’ percentage allocation ensures every user’s commitment is properly documented, preventing schedule conflicts and avoiding single

points of failure.

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. There is support for up to 2 decimal places. 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.

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 (and therefore cannot be manually edited). Task dates can be changed by dragging the left, center, or right part of the date bar and dragging. Current Start dates will automatically pick the next valid date. Weekend dates are disabled.

- When a task has a Finish-Start (FS) or Start-Start (SS) dependency, the Current Start date cannot be manually modified.
- When a task has Finish-Finish (FF) or Start-Finish (SF) dependency, the Current Finish date cannot be manually modified.
- Three-digit numbers default to 1970.

Task Type

Use this field to set a task's type to Task, Stage or Deliverable, so you can structure the work hierarchy conveniently.

Work

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

% Complete

Add an estimated 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).

> **Tip** The automatically calculated summary task Percent Complete values are based on the total completed duration of all child tasks as a percentage of the total duration of all

child tasks.

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.

Target Start

The target date entered manually, or automatically entered when the project was last baselined. See section Baseline the Schedule below.

Target Finish

The target date entered manually, or automatically entered when the project was last baselined. See section Baseline the Schedule below.

Description

Quickly update or add detail to a task description using an intuitive, keyboard-friendly pop-out editor that supports multi-line plain text with basic formatting and a 2000 character limit.

Toolbar Actions



Add Task

See **Add Task** section above.

Expand All

Displays the full hierarchy of parent tasks and their respective subtasks.

Collapse All

Hides all subtasks, displaying only the top-level (root) tasks in the structure.

Refresh

Refreshes the Grid contents.

Delete

Delete selected individual tasks.

Indent

The Indent option will only appear if a task exists above the selected task and the task above is at the same indent level.

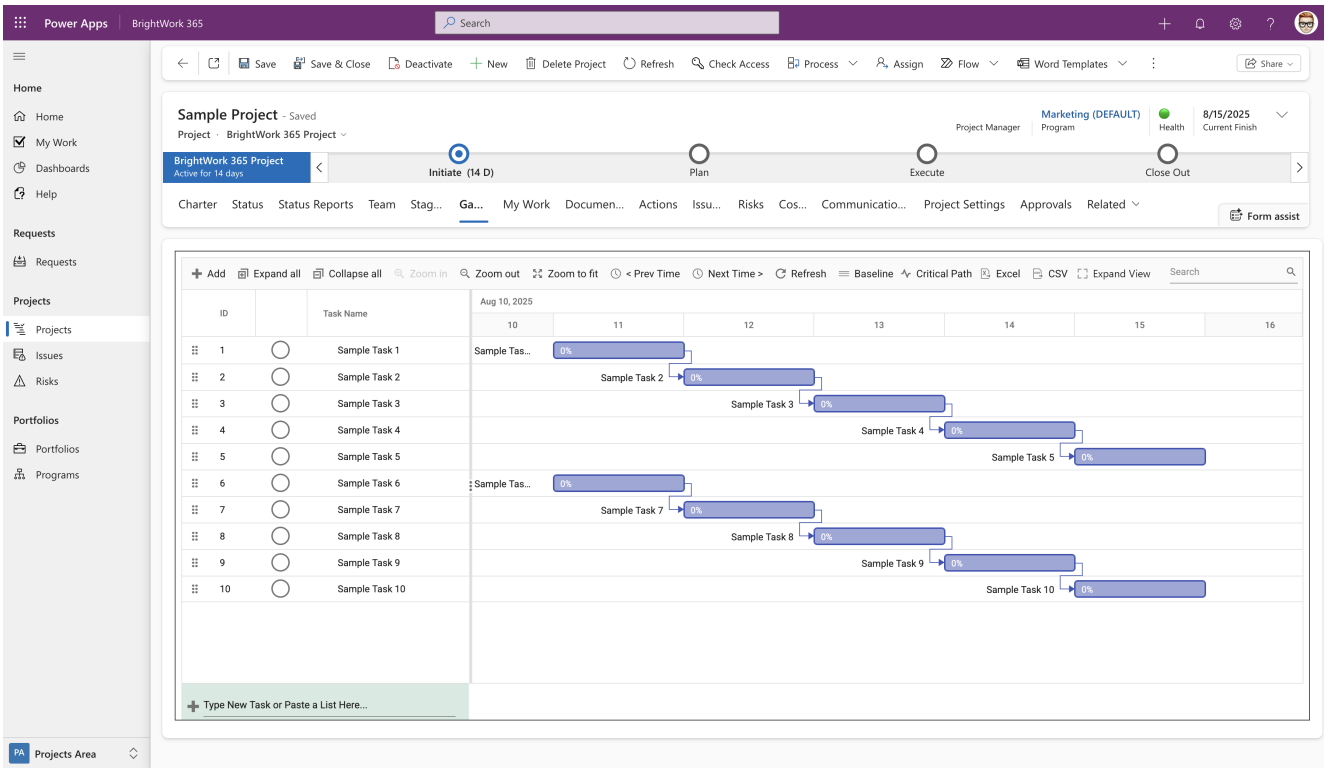
Outdent

The Outdent option will only appear if the selected task is already indented.

Expand View

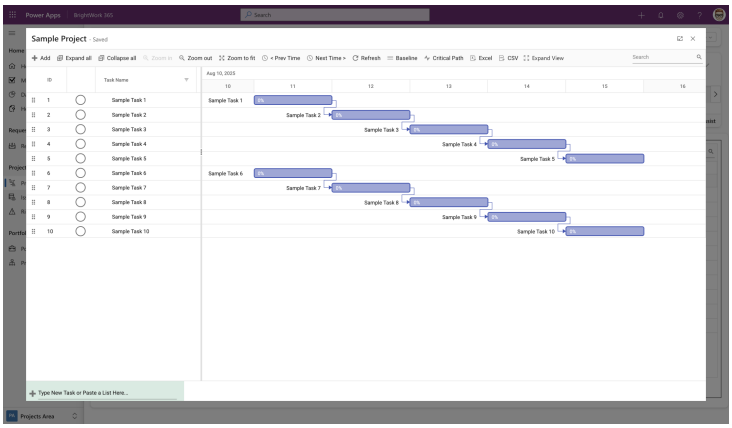
Standard View Mode

Set within a tab that is displayed among the rest of the solution elements.

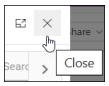


Expanded View Mode

A larger pop-out view.

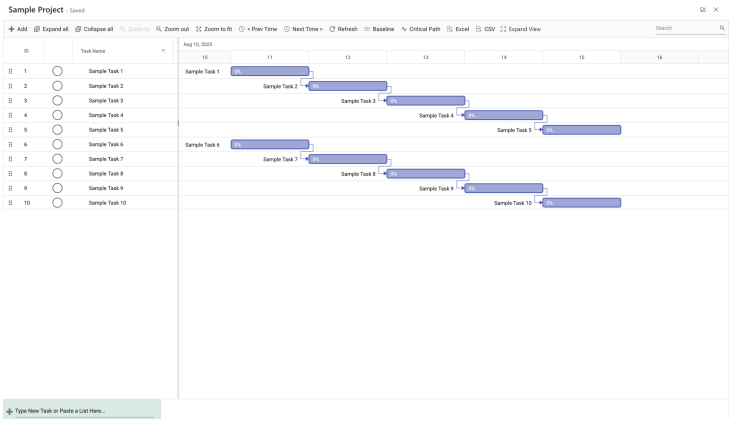


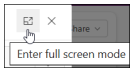
- To enter Expanded view mode, click the Expand View icon 

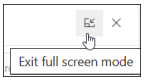
- To exit Expanded view mode, click the Close icon 

Full Screen View Mode

An even larger view 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 the 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.

Context Menu Actions



Delete

Delete the selected task.

Add Task

See **Add Task** section above.

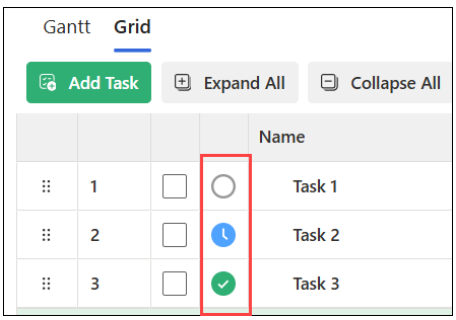
Indent

The Indent option will only appear if a task exists above the selected task and the task above is at the same indent level.

Outdent

The Outdent option will only appear if the selected task is already indented.

Mark Complete



This functionality provides single click interaction to cycle through an editable task's status in

a loop of the following order: Not Started 0% → In Progress 50% → Complete 100% → Not Started 0%.

If there are multiple assignees, a confirmation dialogue will display prior to marking the task complete.

Includes automatic In Progress and Completed icons for Summary Tasks.

- Mark Complete moves to In Progress when Percentage Complete updated to be <100 and >0.
- Percent Complete updated when Mark Complete actioned.
- Does not present a confirmation dialog when multiple users are assigned.

Drag and Drop Individual Rows

To drag and drop items, hover the mouse over the drag icon in the left-most column, click and drag the item vertically, and drop it in the desired location.

If when moving an item to a new location the item row's horizontal line is a single line, the item will be dropped as a task in the same hierarchy level as the task directly above it. Two lines on either side of the row means the item will be dropped as a child-task of the selected item.

Multi-Select

Drag & Drop, Indent/Outdent, Delete multiple rows

- Select/Deselect task rows via checkboxes. You can also deselect rows by pressing the Esc key.
- Shift + Click to range select.
- Ctrl + Click to toggle individual rows.

Drag & Drop multiple rows

- Once the drag interaction is active, a red indicator displaying the number of task being dragged will appear in the top-left hand corner of the task.
- Dragging a collapsed parent moves the entire task branch. The user can press Esc to Cancel an active drag or users can drag off the Grid.
- The relative parent/child structure of selected tasks are preserved.
- Child tasks cannot become orphaned.
- Summary task roll-ups (e.g. % Complete) are recalculated after the move is successfully completed.

Indent/Outdent

- Groups of tasks can be indented or outdented together via context menu, toolbar, and keyboard, provided they were at the same level of hierarchy and/or share a parent child relationship (same task branch).
- Any descendants of selected tasks move with their parent task automatically.

- Indent/Outdent is disabled when:
  - The Grid has a column filter applied.
  - The Grid has a global (search field) filter applied.
  - The Grid is in a non-hierarchical sort mode.
  - The selected tasks are not on the same level as each other.

Delete multiple rows

1. Select the rows to be deleted.
2. Click the **Delete** action.

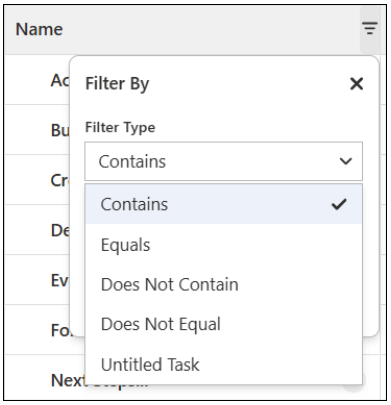


3. Click **Confirm** to complete the action.

Context Menu operations (Delete, Add Task, Select Assignees, Indent, Mark Complete, Mark In Progress, Mark Not Started)

- Different menu options display based on context of selected tasks.
- After selecting the tasks, you need to left-click the ellipses on one of the tasks (do not right-click).
- Summary Tasks cannot be marked Complete or Not Started directly. Those options will not appear in the context menu for a Summary Task.
- Select Assignees
  - Assigning users via multi-select affects only the explicitly selected tasks and does not cascade to child or parent tasks unless selected.

Column Filtering



Column Filtering is applied to the following fields on the Grid:

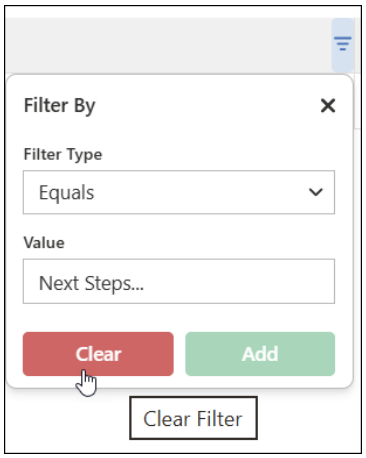
• Task Name • Current Start & Finish • Duration • Work • Mark Complete • Task Type	• Assigned To • Scheduling Type • % Complete • Target Start & Finish • Dependency • Description

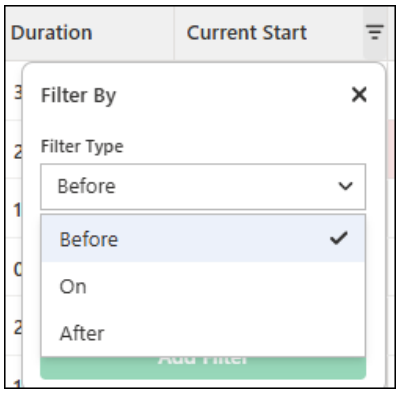
When you hover over columns, those that can be filtered will be noted with a filter icon in the upper-right corner of the column. Click the filter icon and choose from one of the available Filter Types.

Filters remain applied on standard grid view, are not applied to expanded or full screen views but filters persist when you navigate back to the standard grid view.

The final Add button is hidden until you click the value field again.

After column filters have been set, they can be cleared individually by clicking **Clear** in the column's filter dialog.

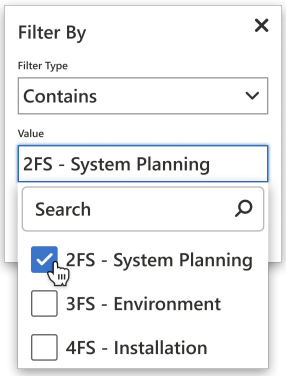




All active column filters can be cleared simultaneously by clicking **Clear All Filters** on the toolbar (only visible when column filters have been set).



Dependency filtering



Equals: Show tasks only if their dependencies contain only exact matches to the selected value(s) and no additional values.

Does Not Equal: Excludes all variations of the selected value. For example, Does Not Equal 2FS → Excludes all 2FS variations.

Searching with Filter By



Grid Filter By searching allows users to search the Grid Task Names and return items that meet the search criteria.

When the user has a 'Filter By' term entered:

- Toolbar items will be disabled: Add Task, Delete, Indent, Outdent
- Quick task add row will be removed
- Drag and drop will be disabled
- Context menu will be disabled

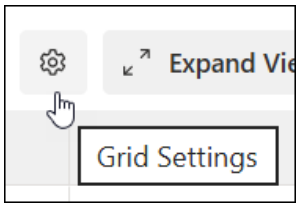
The Filter By instance can be cleared by clicking **Clear All Filters** on the toolbar (only visible when a filter has been set).



Conditional Formatting

Conditional formatting visual cues are applied to any tasks that have a late start or late finish so you can quickly determine their schedule status. Late Current Start dates appear in red text. Late Current Finish dates appear with red text and red fill. This setting remains always on.

Grid Settings



BrightWork PMO Manager security role holders and the Actual Project Manager of the project are able to configure the visibility and order of Project Task columns. These settings can be saved, reset, or cancelled, so they can they can control and preserve the preferred column layout across the project for all users.

When you open the settings dialog and choose to edit column visibility, you can show or hide optional columns while mandatory columns remain permanently visible, so you can tailor the grid to your workflow while ensuring essential fields always appear.

When you reorder columns within the settings dialog, you can freely drag and drop columns except for mandatory columns such as Task Name, so you can customize the grid layout while ensuring required columns always remain fixed in designated positions.

Custom Columns

Custom Project Task columns are also in scope for using Grid Settings to configure visibility. Supported custom column types: String, Date, Number, Choice, Calculated (displays in read-only mode). After the initial creation of custom columns, or after changes to calculated fields, a refresh is needed.

Keyboard Navigation

Interaction Keys	Description
F2	Edits the selected cell.
Enter	Saves the current cell. Toggles checkboxes.
Tab	Saves the current cell and moves selection one cell to the right. When in a Dependency cell, cycles through the Dependency drop-down list. When in an Assigned To cell, cycles through the Assignee drop-down list.

Interaction Keys	Description
Shift + Tab	Saves the current cell and moves the selection one cell to the left.
Esc	Deselects the currently selected element.
Spacebar	Toggles checkboxes.
Ctrl + Home	Navigates to the first cell in the Grid.
Ctrl + End	Navigates to the last cell in the Grid.
Home	Moves focus to the first cell on the selected row.
End	Moves focus to the last cell on the selected row.
Up Arrow	Moves selection up.
Down Arrow	Moves selection down.
Right Arrow	Moves selection right.
Left Arrow	Moves selection left.

Troubleshooting

Multiple Dependencies & Unexpected Offsets

Scenario

- Multiple tasks are linked with dependency relationships and 0 days offset.
- Add another dependency with 0 offset to a task that finishes later than the first dependency task.
- One or more of these tasks is edited in theGantt.
- The first dependency task automatically gets an offset added to match the new Start date.
- If you adjust the duration of either dependency task, that new offset remains.

Workaround

- As soon as a second dependency (or more) are added, the first dependency Offset should be changed back to 0. Changing task duration on any predecessor task should not introduce a new Offset.

Spacebar Used on Cell (in read-mode) Causes Grid to Scroll Down

This is associated with default browser behavior.