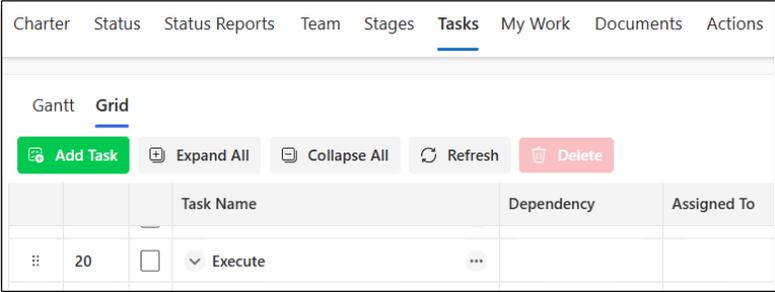


# Tasks Grid

**Note** This article is for Projects created in **BrightWork 365 version 2026-1 and later**. How do you determine the BrightWork 365 version the project was created in? If a project's tabs section contains a **Tasks tab** rather than a **Gantt tab**, the project was created in version 2026-1 or later.



Charter Status Status Reports Team Stages **Tasks** My Work



Charter Status Status Reports Team Stages <b>Tasks</b> My Work Documents Actions				
Gantt		<b>Grid</b>		
		Task Name	Dependency	Assigned To
⋮	20	<input type="checkbox"/> Execute	...	

## 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.

## 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 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 **Tasks** tab in a project.
2. Click the **Grid** sub-tab.
3. You can add a new task in several ways:
  1. In the Grid toolbar click **Add Task**.
  - Or,
  2. Click the context menu, click **Add Task** and choose one of the available options.
  - Or,
  3. Press the keyboard **Enter** key while editing the last task row to create a new task row.
  - Or,
  4. Use the Quick Add feature at the bottom of the Grid.

## Columns

### Name

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

## Dependency

Dependency
80FS
79SS 80FS
83FS
83SS +2 +1

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.

Double-click the Dependency field and click 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.

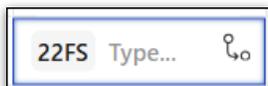
Note that dependency functionality is not applicable to summary tasks.

### 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



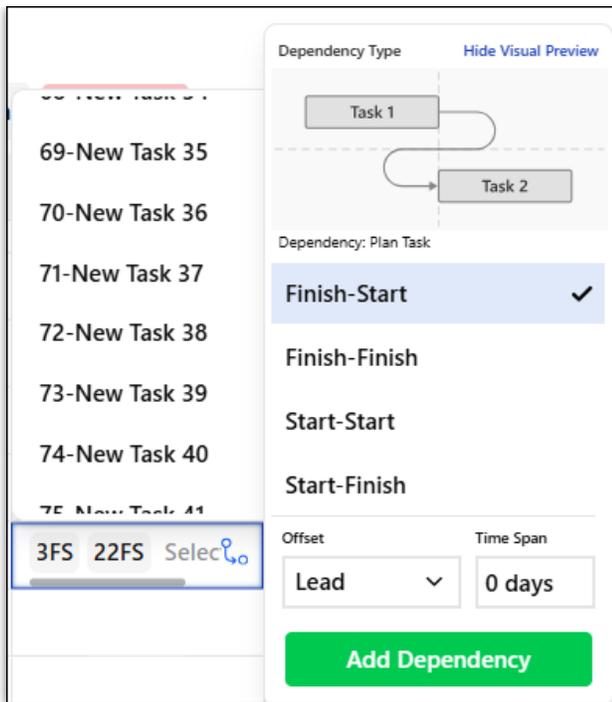
Adding a dependency to the grid can be quickly and easily managed via keyboard inputs. Simply type the task row reference and determine your Start-Finish combination to ensure the dependency begins at exactly the right time. Should you wish to include a lead or lag using this method, it can be added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

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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 as 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:

$$\text{Work} = \text{Duration} * \text{Units}$$

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

Assigned To	Duration
Alex Hankin 	1 day
Search 	
<input type="checkbox"/> Alan Geraghty	
<input type="checkbox"/> Alan Morgan	
<input checked="" type="checkbox"/> Alex Hankin	100
<input type="checkbox"/> Anne Wallace	

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.

## Work

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

## Resources

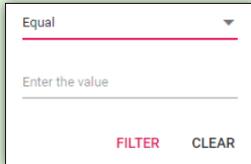
Choose one or more resources to be assigned to the task.

### 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.



A screenshot of a filter dropdown menu. The dropdown is open, showing the word "Equal" at the top. Below it is a text input field with the placeholder text "Enter the value". At the bottom of the dropdown are two buttons: "FILTER" in red and "CLEAR" in grey.

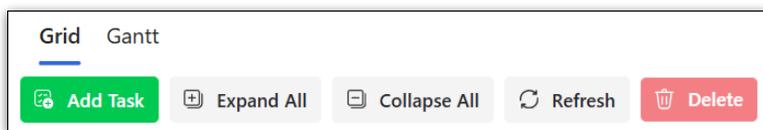
## % Complete

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.

## 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 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.

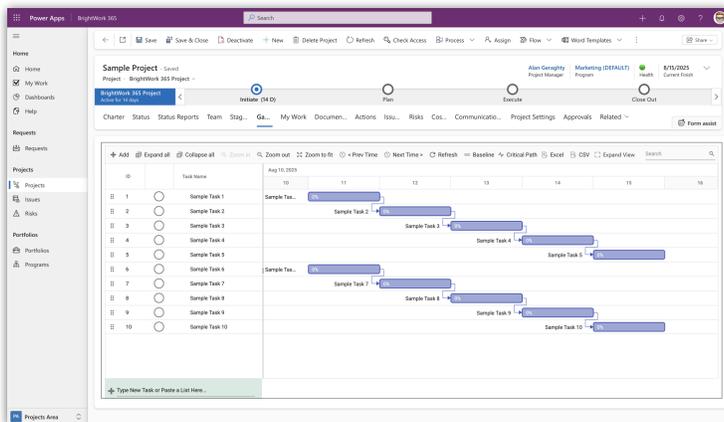
## Outdent

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

## Expand View

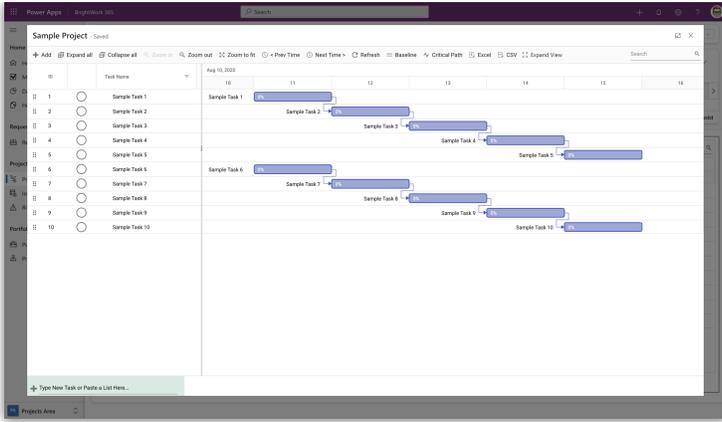
### Standard View Mode

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



### Expanded View Mode

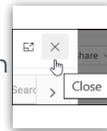
A larger pop-out view.



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

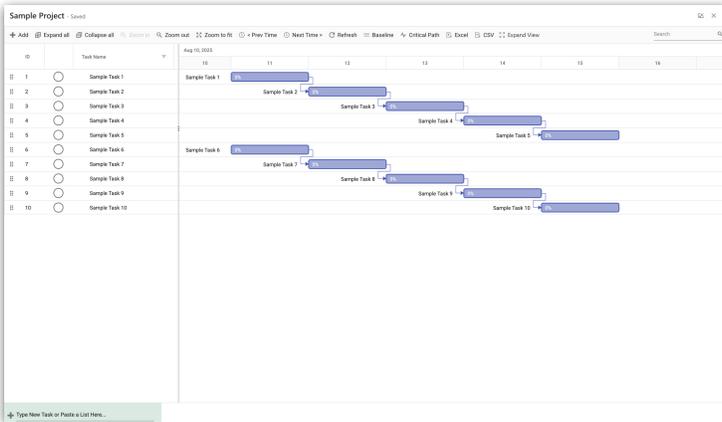


- To exit Expanded view mode, click the Close icon

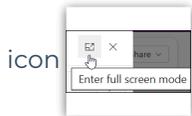


## Full Screen View Mode

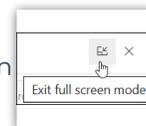
An even larger view that covers the boundaries of the solution.



- 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.

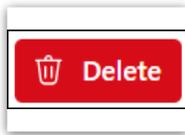
## Multi-Select

To delete multiple rows simultaneously:

1. Select the rows to be deleted by clicking the selection box.

			Task Name
::	1	<input checked="" type="checkbox"/>	▼ New Tas
::	2	<input checked="" type="checkbox"/>	New

2. Click the **Delete** action.



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

## Grid Filter By Searching



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

## Drag and Drop

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 is currently not supported.

## Keyboard Navigation

### Interaction Keys

- F2**
- Enter**

### Description

- Edits the selected cell.
- Saves the current cell. Toggles checkboxes.

## Interaction Keys

## Description

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.
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.

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# 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 the [Gantt](#).
- 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.

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