New User Experience: Project Phases, Milestones, Tasks, and To-Do Items

Tasks: A task is a unit of work in a project plan that is assigned to one or more resources for a specified period. A task can have milestones to measure progress.

Milestones: Milestones help you track and measure progress. For example, add a milestone named planning phase gate complete. The milestone is complete only when all the tasks in the planning phase are completed.

Phases: You can group related tasks and milestones under a common phase in the project lifecycle. For example, create a planning phase followed by a design phase. You can break the planning phase down into planning tasks such as define a resource plan, identify infrastructure requirements, and identify storage requirements. Phases show their aggregated actuals and ETC for their child tasks.

Tip

This online help page is primarily for people working on tasks inside a project. To update tasks spanning multiple projects, or for team members working on tasks and to-do items without a need to work inside a project, use the Multi-Project Tasks page or the My Tasks page. See New User Experience: Track Tasks and To-Do Items.

- Standard Features Across the Timeline, Grid, and Board Layouts
- Managing Tasks in the Timeline Layout
- Manage Tasks in the Board View
- Managing Tasks in the Grid View
- Working with Tasks
- ETC on Assignments with Actuals
- Delete Tasks and Phases
- Use the Task List Module

1. **Timeline layout** – View and manage tasks in a hierarchical timeline so that you can see and manage multiple sub-level task and their relationships.
2. **Board layout** – View project tasks as cards, which you can arrange with drag-and-drop precision on a board layout with columnar swim lanes.
3. **Grid layout** – Analyze project tasks quickly by using an excel-inspired grid layout

Standard Features Across the Timeline, Grid, and Board Layouts

There are a few key features that are available across all the layouts that help you view and edit tasks in the New User Experience.

- Use Filters to Identify Tasks
- Save Views to Personalize Your Experience
- Edit Tasks Using the Three Dot Actions Menu
- Edit Tasks Using the DETAILS Panel

Use Filters to Identify Tasks

You can use the Filtering capabilities to sort through tasks and identity relevant tasks quickly. To learn more about filters, see Getting Started with the New User Experience.

Save Views to Personalize Your Experience

Clarity PPM supports the modification and saving of views by multiple users. Each user can modify their own saved views or work in an unsaved view. The views in grids are responsive to a wide array of user actions inside grids. You can save your filters, your preferences in View Options, the configuration of the Details panel, and your configuration of board columns and cards. To learn more about views, see Getting Started with the New User Experience.

Follow these steps:

1. In the Clarity PPM New User Experience, open a project, and navigate to the **Tasks** module.
2. In Timeline, Board, or Grid layout, select a task. The **DETAILS** layout appears.
3. Click the **Details** tab.
4. Click **CONFIGURE**.
5. To search for a field (task attributes) enter all or part of its name in the search bar.
6. Matching fields appear.
7. Drag a field from the list of fields to the Details panel layout. Drop the field on the top of an existing field.
8. Your new field appears on the layout above the existing field.
9. To reorder the sequence of fields, you can drag-and-drop them into a new arrangement.
10. To remove a field, select it on the layout and then click X Remove.
11. Click EXIT.