

Get Everything You Need to Know About Your Projects with

Outline, Gantt, and Task Detail Views

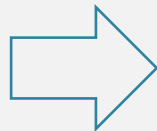
HOW DO OUTLINE, GANTT, AND TASK DETAIL VIEWS WORK?

- Outline View lists your projects phases, tasks, and resources along with start/end dates and other important information.
- Gantt View depicts your project as a visual chart, with phases and tasks represented as bars, and relationships shown with connecting lines.
- Task View is a form for editing task details.

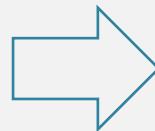
WHAT CAN OUTLINE, GANTT, AND TASK DETAIL VIEWS DO FOR ME?

- Clearly outline your project
- Streamline changes to your plan without needing to make many changes across multiple forms
- Highlight task dependencies, bookings, and critical paths for your project

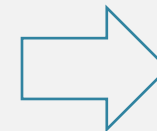
**Open Your
Project in
Outline or
Gantt View**



**Make
Changes in
Outline or
Gantt Chart**



**Open Task
View for
More
Details**



**Save
Changes**

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Creating and Editing a Phase, Task, or Milestone in Outline View

There are several ways to create and edit phases, tasks, and milestones within Outline and Gantt Views, including editing in the Task View form, in-line editing, or using drag-and-drop functionality. The Outline, Gantt, and Task Detail views can be found at Projects > Projects and clicking on a project name. If you have QuickViews for Projects enabled, you can point to a project name and select Outline or Gantt under Quick navigation > Project.

To enable these features, please contact OpenAir Support and request the **Enable Inline editing, Drag-n-Drop, enhanced Gantt layout in project outline view** switch. If using the Outline, Gantt, and Task Detail Views, the **Gantt chart reordering sorts task IDs** switch must be disabled.

To create a new phase, task, or milestone, click the ... icon to open a menu. Select **Duplicate**, or **Create a task**, **Create a Phase**, or **Create a Milestone** above or below an existing phase, task, or milestone. This inserts a new phase, task, or milestone where indicated.

Predecessors edited inline use the following syntax:

[Predecessor's ID][Predecessor Type][lag #]

For example, 5ss-1 indicates that the predecessor is ID 5, has a Start-to-Start type, and a lag of -1 days.

You can indicate multiple predecessors by separating them with a semi-colon (;), for example: 5ss-1;6fs5.

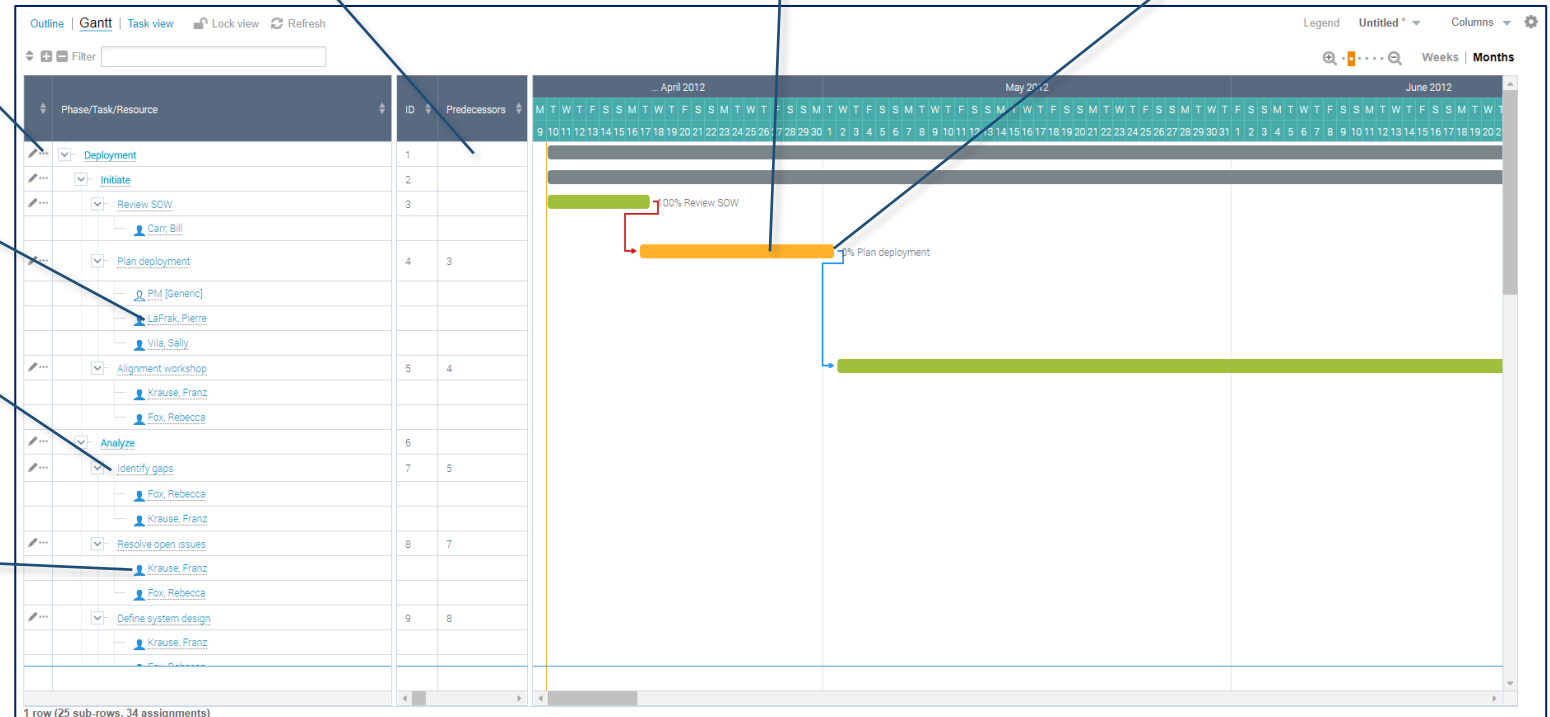
Click on one task and drag to another task to create a finish-to-start dependency between the two tasks. The system recalculates start/end dates, duration, and resource utilization percentage.

Click on one end of a task and drag it left or right to extend or shorten the duration and change the start or end dates. This creates a fixed start or end date, indicated by a green diamond in Outline View.

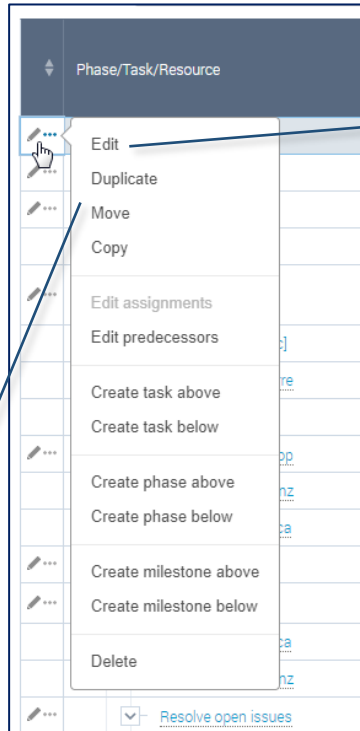
Edit Task Names, Predecessors, Start and End Dates, and Notes in-line by clicking on them.


Drag a task up or down to reorder or change phases.

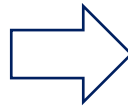
Resource icons give information on resource type, and provide a User-level view of each task. To enable this feature, please contact OpenAir support and request the **Enable User level Outline view** switch.



Creating and Editing a Phase or Task in Outline or Gantt View



Click **Edit** in the context menu or the Edit icon  to open the Task form.



Cancel Delete **Save**

ID* Task name*

Priority Part of phase Project task type

Planned hours Percent complete

Start date (MM/DD/YY) End date (MM/DD/YY)

Starting date is optional and will override computed dates. End date is optional. The percent of employees time will be automatically adjusted to ensure that the task finishes on this date.

▼ Assignments

Assigned to	Assignment profile	Percent of employee's time	Employees planned hours	Divide hours	Primary loaded cost
Ellis, Ed		<input type="text" value="100"/>	<input type="text" value="20"/>	<input type="checkbox"/>	<input type="text"/>
Gates, Jack		<input type="text" value="100"/>	<input type="text" value="20"/>	<input type="checkbox"/>	<input type="text"/>
Garcia, Juan		<input type="text" value="100"/>	<input type="text" value="20"/>	<input type="checkbox"/>	<input type="text"/>
Select...		<input type="text" value="100"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
Select...		<input type="text" value="100"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

- Select **Duplicate** to duplicate a task within the currently selected project.
- Select **Move** to delete the task from this project and move it to another project.
- Select **Copy** to make a copy of this task and move the copy to another project.

Phase/Task/Resource	Start	Finish
Deployment	04/11/12	05/22/14
Initiate	04/11/12	07/19/12
Review SOW	04/11/12	04/19/12
Carr, Bill		

Dates edited in-line change from calculated dates to fixed dates. Fixed dates are indicated by a green diamond.

Outline and Gantt View (detail)

Outline and Gantt Views provide many different ways to customize the view and filter the data used in the display.

Click the **Expand All** or **Collapse All** icon to show or hide Phases, Tasks, and Resources in Outline view.

Click **Lock view** to disable editing in Outline and Gantt Views.

Click the **Refresh** icon to refresh data in Gantt and Outline Views.

Click a column header's edge and drag it left or right to resize it.

Click the **Zoom in** or **Zoom out** icons to change the zoom level in Gantt View.

Click **Weeks** or **Months** to change the date display scale in Gantt View.

Point to **Legend** to see what each color, line, and icon in Gantt View stand for.

Click the **Cog** icon to open a menu which allows you to customize the list view, download list data, or use Task View with Outline View or additionally with Gantt View.

Click the **Clear Sort** icon to remove Primary, Secondary, and Tertiary sort criteria, and sort all columns by the default criteria.

Use the **Filter** to search for and display phases, tasks, milestones, and resources with particular text strings in them.









For example, if you type "Gate" into the filter field and hit Enter, Outline and Gantt views will display projects with names such as "Gate installation" or resources like "Gates, Jack."







Click a column heading to make it the Primary sort criteria. Click a new column heading and it becomes the new primary sort criteria, and the previous primary becomes the secondary. Click a third time to set a new primary, secondary, and tertiary sort field.















The sort icons indicate whether a column heading is the primary, secondary, or tertiary sort criteria.

- Primary – white arrow
- Secondary – yellow arrow
- Tertiary – green arrow

Outline and Gantt View Icons

Outline and Gantt View Tools	
Icon	Description
	Clear Sort - Click to remove Primary, Secondary, and Tertiary sort criteria, and sort all columns by the default criteria.
	Expand All - Click to show all Phases, Tasks, and Resources in Outline View
	Collapse All - Click to hide all Tasks and Resources in Outline View.
	Lock View - Click to disable editing in Outline and Gantt Views
	Refresh - Click to refresh data in Gantt and Outline Views
	Zoom In - click to zoom in the Gantt View display
	Zoom Out - Click to zoom out the Gantt View display
	Cog - Click to open a menu with Outline and Gantt View customization options

Resource Icons	
Icon	Description
	Active Resource - An active resource who can be assigned to tasks, record time, etc.
	Inactive Resource - When a resource is inactive, they cannot log in to the OpenAir account, enter time, expenses, etc.
	Active Generic Resource - Use when you know the type of resource needed but not the specific individual. Generic resources cannot record time or expenses and can only be used for forecasting.
	Inactive Generic Resource - Use when you know the type of resource needed but not the specific individual. Cannot log in to OpenAir, enter time, expenses, etc. They can be replaced with a real resource later.
	Active Assignment Group - Use assignment groups for tasks to assign to a large number of employees. The hours set can be split evenly among the group of kept the same across each employee in the group.
	Inactive Assignment Group - An assignment group whose members cannot log into OpenAir, enter time, expenses, etc.

Gantt View Line Types, Colors, and Icons	
	Phase not started
	Phase in progress
	Phase completed
	Task not started
	Task in progress
	Task on critical path, not started
	Task on critical path in progress
	Task completed
	Milestone / unassigned task
	Milestone on critical path
	Milestone completed
	Dependency
	Dependency with a conflict
	Dependency with lag