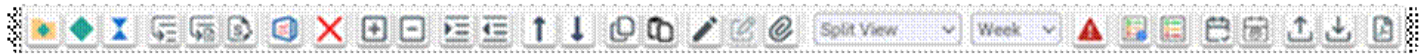


Project Plan Views

The Gantt Chart serves as a visual framework for the Project Plan, offering a range of interactive views—including Split View (Tree Grid & Timeline), Tree Grid View, Timeline View, and Resource View. These adaptable perspectives provide project teams with the flexibility to manage tasks, track dependencies, and allocate resources with precision and efficiency.

The Project Plan supports bulk actions across consecutive rows, enabling users to delete, copy, paste, reorder, indent, and outdent multiple tasks simultaneously. These capabilities significantly boost productivity by allowing rapid adjustments to task hierarchies without requiring individual updates.

In addition, the Project Plan features a robust toolbar equipped with essential actions for seamless task management. Users can easily add new tasks, modify schedules, adjust dependencies, and allocate resources directly from the toolbar. Together, these tools foster efficient project execution while preserving a well-organized and conflict-free project timeline.

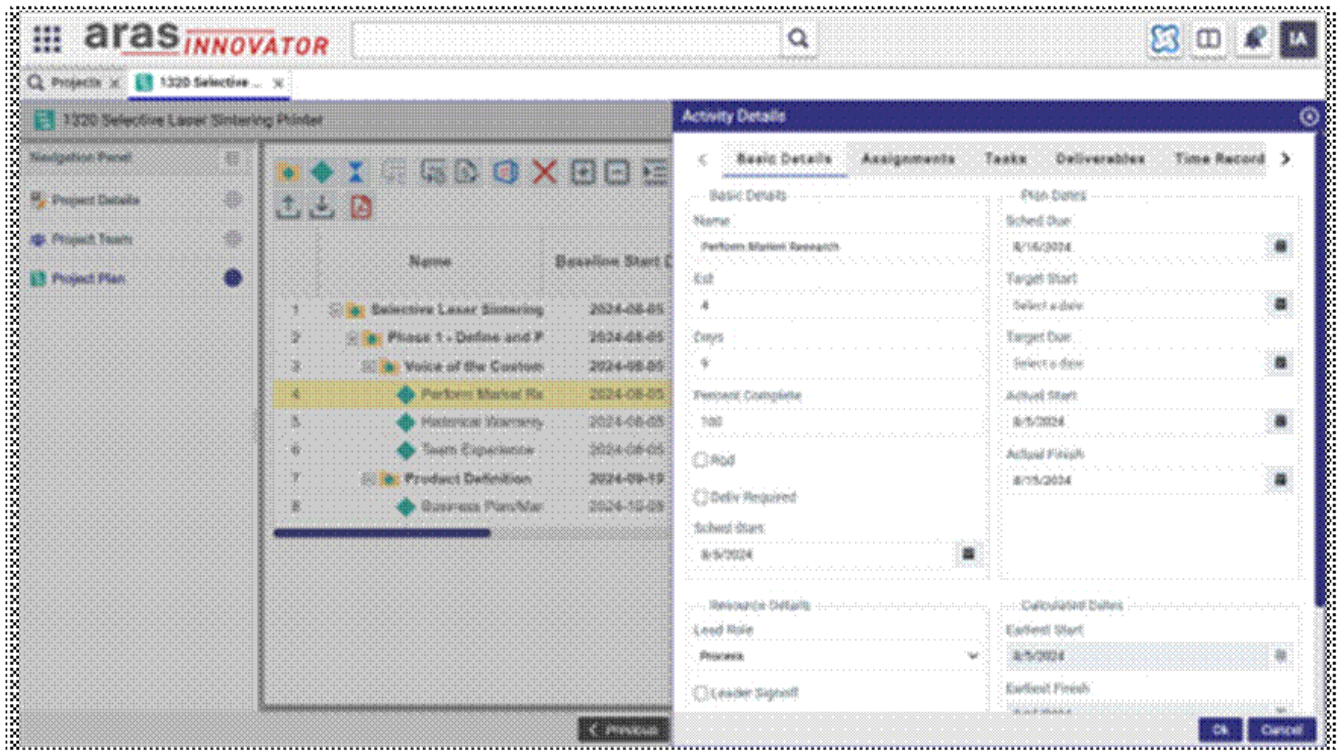


Various Actions on Toolbar of Project Plan

- **Add WBS Element:** This action enables users to insert a new Work Breakdown Structure (WBS) element into the project hierarchy. By selecting Add WBS Element, the new element is positioned immediately after the currently selected task or item. A WBS element typically serves as a parent task, under which additional components—such as other WBS elements, activities, and milestones—can be structured.
- **Add Activity:** Use this action to add a new activity to the project structure. The new task is inserted immediately after the currently selected task or element, streamlining task creation within the project's workflow.
- **Add Milestone:** Select this action to insert a milestone immediately after the chosen task or element. Milestones represent key events or deliverables within the project timeline, and by definition, each milestone spans a single day—making them ideal for tracking major progress points and deadlines.
- **Insert Activity:** This action enables users to reuse a predefined project structure by selecting an activity from the search flyout and inserting it into the current project. To maintain structural integrity, activities must be placed within a designated WBS element.
- **Insert Subproject:** This action enables users to insert a subproject into the main project—mirroring the functionality found in Microsoft Project (MPP). Once added, the subproject is linked to the master project, allowing for centralized coordination and visibility. Users can select a subproject from the search flyout and seamlessly integrate it into the primary structure, supporting efficient management of multiple interconnected projects within a unified workspace.
- **Manage Subproject:** After inserting a subproject into the main project, this action will be enabled. It allows users to:
 - Open the subproject in a new tab, allowing users to work on it independently while maintaining its connection to the main project.
 - Change the lifecycle state of the subproject to reflect its progression through various project phases, ensuring accurate tracking and phase alignment within the overall project structure.
 - D-Link the subproject from the master project if needed.



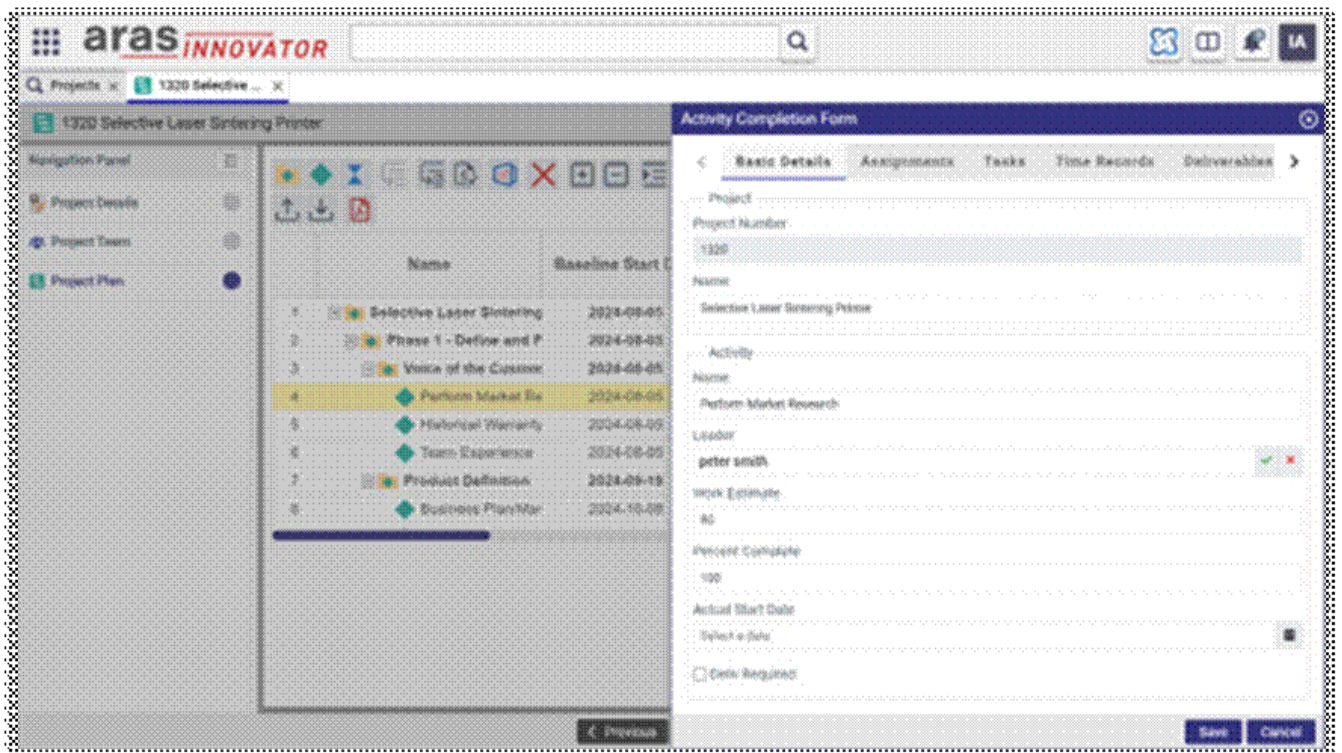
- **Update Project:** The system automatically updates the percentage completion of each WBS element based on the progress of its child activities, ensuring a more precise reflection of the overall project status. Additionally, it applies color coding to visually represent task progress, enhancing clarity and making it easier to assess project health at a glance.
 - **Delete:** Select this action to delete a task or element from the project structure.
 - **Expand All:** Use this action to expand the entire project hierarchy, revealing all levels—including tasks, templates, and subprojects—for a complete and unobstructed view of the project's structure.
 - **Collapse All:** Select this action hides all sub-level tasks, activities, and subprojects, showing only the top-level project phases for a simplified view.
 - **Indent:** This action moves the selected task or element under another, creating a parent-child relationship within the project hierarchy.
 - **Outdent:** The outdent action promotes an indented task or element to a higher level in the hierarchy.
 - **Up:** Select up action moves the selected activity, milestone, or element above the preceding item in the list.
 - **Down:** Select Down action moves the selected item below the next task, activity, or milestone in sequence.
 - **Copy:** Use this action to copy the selected activity or WBS element from the project. Users can select multiple items using multiselect for efficient bulk operations.
 - **Paste:** Select Paste action to Inserts the copied content from the clipboard either into or after the selected task or element.
- **Timeline View Options:** Allows users to customize the Gantt Chart view by switching between day, week, month, quarter, or year scales—enhancing schedule visibility.



- **Activity Details:** Select activity details action opens a detailed flyout for the selected task, activity, or milestone, displaying key information such as assignments, deliverables, time records, and comments.
- **Basic Details:** Displays the activity's leader, lead role percentage, scheduling, and duration. These values are editable, making it easy to monitor and adjust project timelines.
- **Assignment:** Allows users to efficiently manage team roles by adding or deleting assignments for the selected activity.
- **Task:** Enables users to add or remove tasks within an activity, supporting flexible and up-to-date task management.



- **Deliverables:** Shows documents attached to the activity. Users can insert or delete files, helping maintain organized and accessible deliverables.
- **Time Record:** Select the Time Record tab to let users add or remove time entries in the time record table—crucial for tracking effort spent on specific tasks.
- **Comment:** Select the Comment tab to attach files and enter comments related to the activity. This feature supports clear documentation and collaboration.
- **Activity Completion Form:** Select the activity completion action to present a read-only summary of key details for the selected element, activity, or milestone. Users can still update the status of assignments and tasks directly from the form, making activity closure streamlined and efficient.



In the Assignments tab, users can mark assignments and tasks as complete and verify their completion status. This functionality supports accurate progress tracking and reinforces accountability across the project team.

- **Add Existing Deliverables:** Select the add deliverables action to Attach a document to an activity by selecting it from the search flyout. Deliverables serve as essential documentation for each activity, supporting project goals and fulfilling stakeholder expectations.
- **Show Critical Path:** Highlights the project's critical path across all views in red. The critical path reflects the sequence of tasks that directly affect the shortest project duration. It is automatically updated when task dates are modified, ensuring visibility into the most current project schedule.



- **Update Baseline:** Use Update Baseline to overwrite baseline start and end dates with the current planned dates for each task, keeping the baseline aligned with the latest approved schedule. Refer to Section [Project Baseline](#) for detailed instructions.
- **Show Deviation:** This action visually identifies differences between baseline and planned task dates using intuitive color coding, helping users quickly spot delays or advancements. See [Project Baseline](#) for more details.
- **Project Calendar:** The Project Calendar defines the overall project's working days, non-working days, and holidays, guiding consistent scheduling throughout all phases. Refer to [Project Calendar](#) for customization details.
- **Teams Calendar:** The **Teams Calendar** presents team members' individual schedules in one view to help manage workloads, avoid conflicts, and track team-wide progress. For information on configuring and managing the Teams Calendar, please refer to [Team Calendar](#).
- **Export PDF:** Select this action to generate a PDF file containing all visible data displayed in the structured layout of the project plan.

