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
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 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.

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.

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

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.

Click on one 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.

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You can indicate multiple predecessors by separating them with a semi-colon (;), for example: 5ss-1;6fs5.
Creating and Editing a Phase or Task in Outline or Gantt View

- 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.

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

Dates edited in-line change from calculated dates to fixed dates. Fixed dates are indicated by a green diamond.
Outline, Gantt, and Task Detail Views Quick Reference

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

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

Click the **Zoom in** or **Zoom out** icons 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 a column header's edge and drag it left or right to resize it.

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

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

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

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

Click **Unlock view** to enable editing in Outline and Gantt Views.

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

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

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.
### Outline and Gantt View Icons

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

### Resource Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Person]</td>
<td>Active Resource - An active resource who can be assigned to tasks, record time, etc.</td>
</tr>
<tr>
<td>![Person]</td>
<td>Inactive Resource - When a resource is inactive, they cannot log in to the OpenAir account, enter time, expenses, etc.</td>
</tr>
<tr>
<td>![Person]</td>
<td>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.</td>
</tr>
<tr>
<td>![Person]</td>
<td>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.</td>
</tr>
<tr>
<td>![Person]</td>
<td>Active Assignment Group - Use assignment groups 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.</td>
</tr>
<tr>
<td>![Person]</td>
<td>Inactive Assignment Group - An assignment group whose members cannot log into OpenAir, enter time, expenses, etc.</td>
</tr>
</tbody>
</table>

### 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