

## Using the Scheduler (Gantt Chart)

### Overview

Using the Schedules module is for users who are either: Managing the project schedule, or are interested in reviewing the current schedule. The scheduler is a Gantt chart style graph, and has common Gantt chart features, like tasks, child tasks, and dependencies.

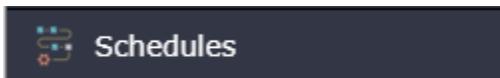
In order to access the Schedules, the admin must turn the feature on for the user. There are two configuration options available for the scheduler module, which the Account Owner Admin will find in user's profiles.

The configuration options are described as follows:

- |                                |                          |   |
|--------------------------------|--------------------------|---|
| <b>Scheduler Access</b>        | <input type="checkbox"/> | This allows you to view schedules that are in your current project.           |
| <b>Scheduler Create / Edit</b> | <input type="checkbox"/> | This allows you to create schedules and edit schedules that you have created. |

The configuration options can be turned on by the Account Owner Admin. Once turned on you will have access and the menu item labeled **Schedules** will appear in near the bottom of the Left Menu.

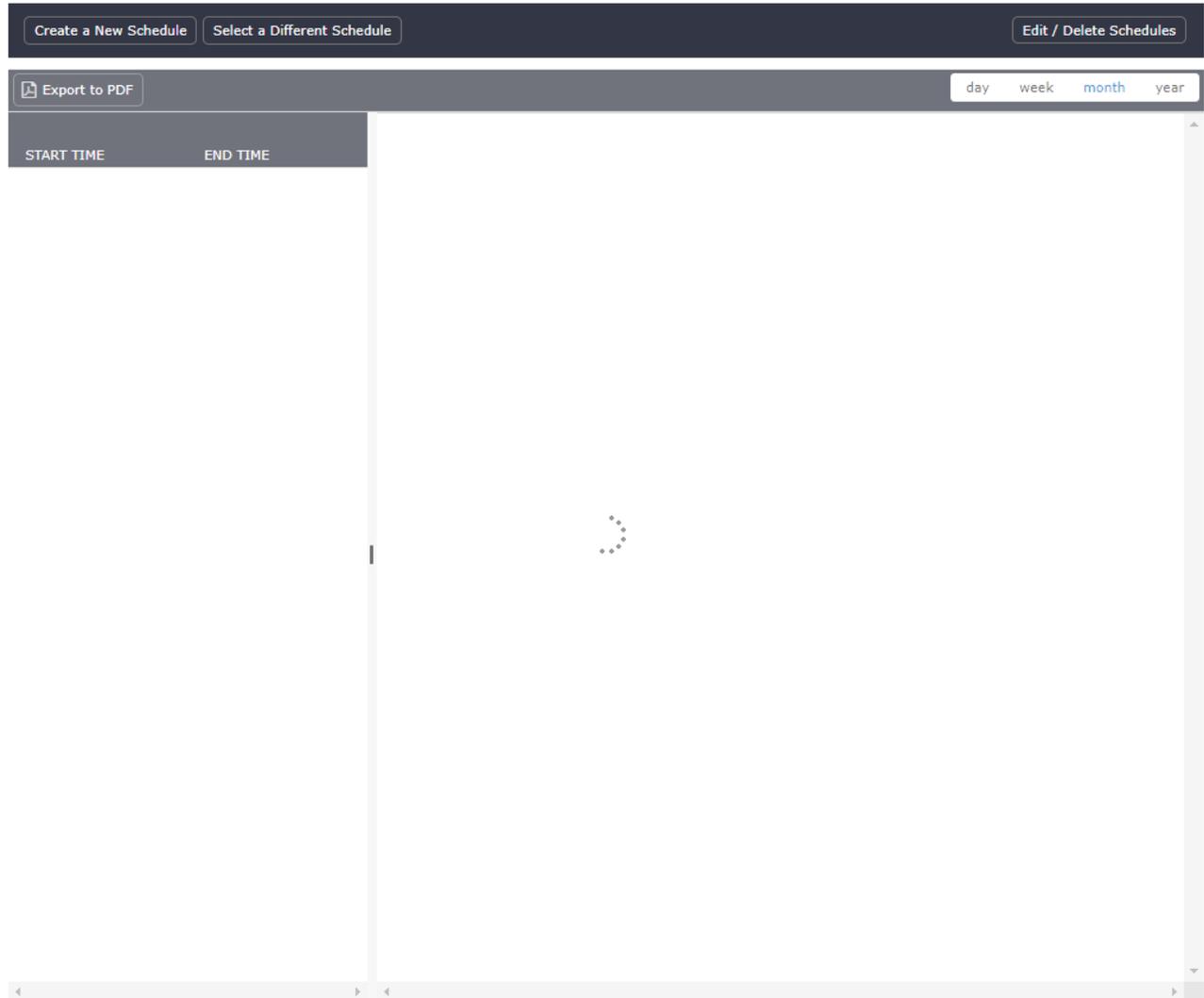
Once configured, this menu item will appear



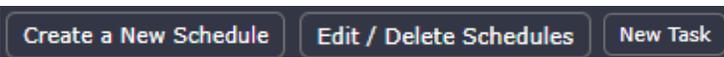
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### Using the Schedules Module

Once opened you will be displayed this screen.

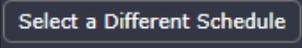


**NOTE:** If you have the Scheduler Create / Edit option enabled, you will see the buttons:



Otherwise, you will only be able to view schedules that are in your current project.

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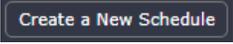
Regardless of the step or profile configurations, the first step will always be to select the schedule you want to work within by selecting 

If **Scheduler Create / Edit** is not enabled, you can skip to Section 3, Viewing Schedules

### 1. Creating a New Schedule

1.1 Creating a new Schedule can be done by:

1.1.1 Opening the **Schedules Module** in the left menu.

1.1.2 Using the  button in the Gantt Chart header

1.1.3 A prompt will appear to enter a Name for the Schedule. Enter the name and click **Create**

1.1.4 The Schedule is now created and can be selected by clicking 

### 2. Creating Tasks

2.1 Creating Parent Tasks is done once the desired project has been selected

2.1.1 Select the  button.

2.1.2 You will be presented the form to enter a new Task.

2.1.3 Enter the information including the required fields:

Start Time	Enter the start time of the task.  NOTE: If this is a parent task, make sure the start time reflects the earliest start date of any child tasks.
End Time	Enter the end time of the task.  NOTE: If this is a parent task make sure the end time reflects the latest end date of any child tasks.
Subject	Give the task a Subject.

2.1.4 The rest of the fields are Optional. Fill out as necessary.

2.2 Child Tasks can be created in relation to the associated Parent task.

2.2.1 Child tasks can be created:

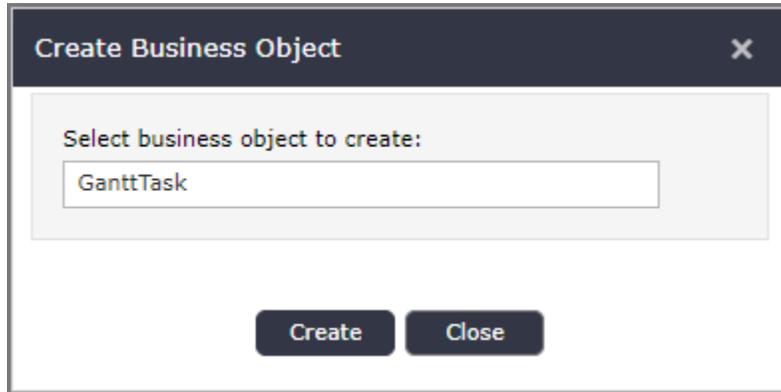
2.2.1.1 When the parent task is being initialized.

2.2.1.2 After the parent task is already created.

2.2.2 In the form of the Parent Task, near the bottom, click the 

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2.2.3 You will be presented a pop up with a single option to select



2.2.4 Click create on this pop up window with the default (and only) value selected.

2.2.5 You will be presented the same form as the parent task, but this task will be created as a child task of the parent task.

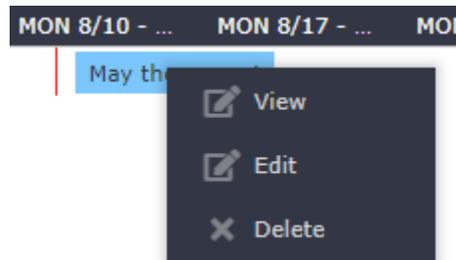
NOTE: You may create another child task *within* the child task. This task hierarchy can continue to as many levels as needed.

2.3 To Create Child Tasks from Parent tasks that have already been created,

2.3.1 Find the Parent Task that you would like to create child tasks for.

2.3.2 Right Click the Task and you will be presented with a menu

2.3.2.1 In this menu, Select **Edit**



2.3.2.2 You will be presented the Parent Tasks form, where, as described above, you can create child tasks of the Parent Task.

2.4 You can view child tasks in the Left Section of the Gantt, or by right clicking the Parent task, and clicking either View or Edit. The child tasks will be listed at the bottom of the form of the parent task.

### 3. Viewing Schedules

3.1 To view schedules open the Schedules Module in the Left Menu

3.1.1 Click the **Select a Different Schedule** to select the schedule that you are interested in.

3.1.2 You will be able to view the Parent Tasks and Child Tasks, as well as adjust the time scale

that you are interested in using the  buttons in the top right corner of the Gantt.