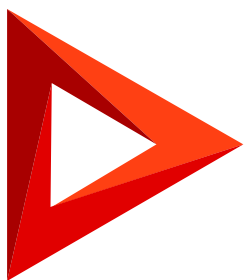


# Project tasks

Manage project tasks

Version 7.17



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# Table of Contents

|                             |          |
|-----------------------------|----------|
| <b>Manage project tasks</b> | <b>4</b> |
| Add a root project task     | 4        |
| Add task resources          | 5        |
| Change the task timeframe   | 5        |

# Manage project tasks

PRODUCTS: SALES CREATIO

For new Creatio instances this functionality is available for Creatio version 8.0.9 and earlier. Existing Creatio instances keep the Classic UI section after updating to Creatio version 8.0.10 and later.

The project structure consists of tasks that must be finished in time to consider the project completed.

Add root tasks and their subordinate tasks, manage task dates, assign task owners, and allocate resources required for task completion.

## Add a root project task

1. In the [ *Projects* ] section, open the needed project.
2. Click the [ *Structure* ] tab.
3. Click [ *Add root project task* ] in the action menu of the [ *Structure* ] detail and populate the task page that opens:

- a. Populate the general task information:

|        |   |
|--------|---|
| Name   | Project task name. The field is required.   |
| Status | Project completion status, for example, "Planned" or "In Progress." By default, the "Planned" value is set. The field is required.  |
| Owner  | Creatio user, responsible for carrying out the project task. Set to the name of the current user by default. The field is required. |

- b. Populate the fields on the [ *General information* ] tab:

|            |  |
|------------|--|
| Account    | The customer of the project task.                  |
| Contact    | The contact who is a customer of the project task. |
| Start date | Planned date and time for the project task.        |
| Due date   |  |
| Deadline   | Deadline for the project task.                     |

4. Navigate to the [ *Attachments and notes* ] tab to add files and links related to the task. For example, add documents or useful links related to the project on the [ *Attachments* ] detail.

5. Click [ *Save* ].

As a result, a new root task will be added to the project structure.

To **add a subordinate task**, select the task on the [ *Structure* ] detail and click [ *Add subordinate project task* ] in the detail action menu. Populate the page that opens in the same manner as the root project task page.

## Add task resources

1. In the [ *Projects* ] section, open the needed project.
2. Navigate to the [ *Structure* ] tab and click the needed record in the menu of the [ *Structure* ] detail.
3. On the page that opens, click on the [ *Resources* ] detail.  
A resource item page open will open.
4. Populate the page fields:

|                          |  |
|--------------------------|--|
| Task                     | The task the resource is added to. This is a non-editable field.   |
| Resource                 | Resource name. For example, an employee's name or role in the project: "Analyst," "Developer," or "Designer." The field is required.   |
| Expected working time, h | The man-hours needed for the employee to complete the project.   |
| Actual working time, h   | Employee's working time actually spent on the project task. This is a non-editable field. The [ <i>Calculate actual working time</i> ] action automatically calculates the value for this field. |

5. Click [ *Save* ].

As a result, a new item will be added to the resources required for task completion.

## Change the task timeframe

Offset the timeframe of a project task and its subordinate project tasks for the specified time period. To do this:

1. In the [ *Projects* ] section, open the needed project.
2. Navigate to the [ *Structure* ] tab and select the needed record in the menu of the [ *Structure* ] detail.
3. Select [ *Edit project task timeframe* ] in the detail action menu.
4. On the page that opens, select "Next" or "Back" and populate the [ *Quantity of days* ] field to specify the number of days to offset the timeframe.
5. Click [ *Save* ].

As a result, the dates of the task will change accordingly.