

# iTaskX



iTaskX – MS Project compatible project management tool for Mac OS X



# MANUAL



## 1.0 | iTTaskX Brief Instruction

- 1.1 Tasks
  - 1.1.1 Define the project .....5
  - 1.1.2 Define general working times .....5
  - 1.1.3 List the tasks in the project .....6
  - 1.1.4 Organize tasks into phases .....8
  - 1.1.5 Shedule tasks .....9
  - 1.1.6 Add more task information..... 11
  - 1.1.7 Add columns of additional information..... 12
  - 1.1.8 Constrain tasks ..... 13
  - 1.1.9 Add documents to the project ..... 14
- 1.2 Resources
  - 1.2.1 Specify people and equipment for the project..... 15
  - 1.2.2 Define working times for resources ..... 18
  - 1.2.3 Assign people and equipment to tasks ..... 19
  - 1.2.4 Add more resource information..... 20
  - 1.2.5 Add columns of additional information..... 21
- 1.3 Track
  - 1.3.1 Save as baseline plan to compare with later versions .....22
  - 1.3.2 Prepare to track the progress of your project..... 23
  - 1.3.3 Make changes to the project..... 25
  - 1.3.4 Identify critical tasks ..... 25
- 1.4 Report
  - 1.4.1 Change the look or content of the Gantt Chart or Tracking Gantt .....27
  - 1.4.2 Change font style and fonts in views ..... 31
  - 1.4.3 Print current view ..... 32
  - 1.4.4 Compare progress against baseline work ..... 33
  - 1.4.5 See how resources time is allocated ..... 35
  - 1.4.6 See project costs ..... 36

## 2.0 | iTTaskX Help Topics

- 2.1 Startup & Customizing
  - 2.1.1 System Requirements ..... 38
  - 2.1.2 License Agreement..... 38
  - 2.1.3 Using the iTTaskX Guide ..... 40
  - 2.1.4 Using the iTTaskX Inspectors ..... 40
  - 2.1.5 Defaults and Templates..... 40
- 2.2 Create a Project
  - 2.2.1 About Scheduling ..... 42
  - 2.2.2 Specify a Project Start..... 42
  - 2.2.3 About Tasks ..... 42
  - 2.2.4 Entering Tasks ..... 43
  - 2.2.5 Working with Task Durations..... 44
  - 2.2.6 Create a Milestone..... 44
  - 2.2.7 Attach Supporting Information ..... 45
  - 2.2.8 About Task Constraints ..... 46
  - 2.2.9 Setting or Changing Task Constraints..... 46
  - 2.2.10 About Outlining Tasks..... 47
  - 2.2.11 Outlining Tasks ..... 48
  - 2.2.12 Linking Tasks ..... 49
  - 2.2.13 Lead and Lag Time ..... 50
  - 2.2.14 Rearrange Tasks..... 50



- 2.2.15 Delaying Tasks ..... 51
- 2.2.16 Setting Task Types ..... 52
- 2.2.17 Baseline ..... 53
- 2.3 Appearance
  - 2.3.1 Working with Tables ..... 54
  - 2.3.2 Working with Custom Views ..... 54
  - 2.3.3 Change the Font for a Single Row ..... 55
  - 2.3.4 Change the Text Formatting of a single Task Type ..... 55
  - 2.3.5 Change the Appearance and Add Text of a Single Gantt Bar ..... 56
  - 2.3.6 Change the Appearance and Add Text of a single Task Type ..... 57
  - 2.3.7 Change the Timescale ..... 58
  - 2.3.8 Change the Appearance of Non-working Time ..... 59
- 2.4 Working with Calendars
  - 2.4.1 About Calendars..... 60
  - 2.4.2 Change Task Scheduling Defaults..... 60
  - 2.4.3 Set Working Time for the Project Calendar..... 61
  - 2.4.4 Create a Calendar for a Task or Resource ..... 61
  - 2.4.5 Assign a Calendar to a Task ..... 62
  - 2.4.6 Assign a Calendar to a Resource..... 62
- 2.5 Resources & Assignments
  - 2.5.1 Add Resources to your Project..... 63
  - 2.5.2 Update Resource Names ..... 65
  - 2.5.3 About Effort driven Scheduling ..... 65
  - 2.5.4 Assigning Resources ..... 66
  - 2.5.5 Replace a Resource Assignment ..... 67
  - 2.5.6 Remove a Resource Assignment ..... 68
  - 2.5.7 View the Task List and Resource Assignments ..... 69
  - 2.5.8 Resolving Resource Overallocation ..... 69
- 2.6 Tracking Progress
  - 2.6.1 About Tracking ..... 71
  - 2.6.2 Update Actual Start and Finish Dates ..... 72
  - 2.6.3 Update Actual Work..... 73
  - 2.6.4 Update Actual Duration ..... 73
  - 2.6.5 Update Completed Tasks Quickly ..... 73
  - 2.6.6 Update Remaining Duration or Work..... 73
  - 2.6.7 Update Total Actual Work for Resource Assignments..... 74
  - 2.6.8 Check for Tasks that are Behind Schedule ..... 74
  - 2.6.9 Determine if the Project End Date has Changed ..... 74
  - 2.6.10 Find Slack in your Schedule ..... 75
  - 2.6.11 Critical Tasks (Path)..... 75
- 2.7 Working with Costs
  - 2.7.1 Entering Pay Rates for Resources ..... 76
  - 2.7.2 Enter Costs for Material Resources ..... 76
  - 2.7.3 Set a Fixed Cost for a Task ..... 76
  - 2.7.4 Set Overtime Costs ..... 77
  - 2.7.5 View Costs ..... 77
  - 2.7.6 View Cost Variances ..... 78
- 2.8 Printing and Export
  - 2.8.1 Printing Views ..... 79
  - 2.8.2 Export and Exchange Projects ..... 79
- 2.9 Spotlight
  - 2.9.1 Advanced search options..... 81



**3.0 | iTTaskX Dialogs and Sheets Help**

- 3.1 iTTaskX
  - 3.1.1 Preferences ..... 82
  - 3.1.2 License Information..... 83
- 3.2 File
  - 3.2.1 Open ..... 84
  - 3.2.2 Save as ..... 84
  - 3.2.3 Save View as Image ..... 85
  - 3.2.4 Page Setup (Footer) ..... 86
- 3.3 Edit
  - 3.3.1 Task Information ..... 87
  - 3.3.2 Resource Information ..... 88
  - 3.3.3 Assignment Information ..... 89
  - 3.3.4 Project Information..... 90
  - 3.3.5 Project Options ..... 91
  - 3.3.6 Working Times ..... 93
  - 3.3.7 Text Field Mappings ..... 94
- 3.4 Insert
  - 3.4.1 Search in Address Book ..... 95
  - 3.4.2 Search in Directory Server..... 95
  - 3.4.3 Search in Exchange Public Folder..... 96
- 3.5 Tracking
  - 3.5.1 Update Task ..... 97
  - 3.5.2 Update Project..... 98
- 3.6 Format
  - 3.6.1 Text Styles ..... 99
  - 3.6.2 Bar Styles ..... 99
  - 3.6.3 Format Timescale ..... 100
  - 3.6.4 Format View ..... 101
  - 3.6.5 Format Bar ..... 102
  - 3.6.6 Format Drawing ..... 103
- 3.7 View
  - 3.7.1 New Custom View ..... 104
  - 3.7.2 Save Current View as ..... 104
  - 3.7.3 Manage Custom Views ..... 104
  - 3.7.4 Customize Columns ..... 105
  - 3.7.5 Graphics List (Inspector)..... 105
  - 3.7.6 Format Information (Inspector)..... 106
  - 3.7.7 Item Informationen (Inspector) ..... 109
  - 3.7.8 Customize Toolbar ..... 114
- 3.8 Help
  - 3.8.1 Send Feedback ..... 115

**4.0 | iTTaskX Hints..... 116**

**5.0 | iTTaskX Shortcuts..... 118**

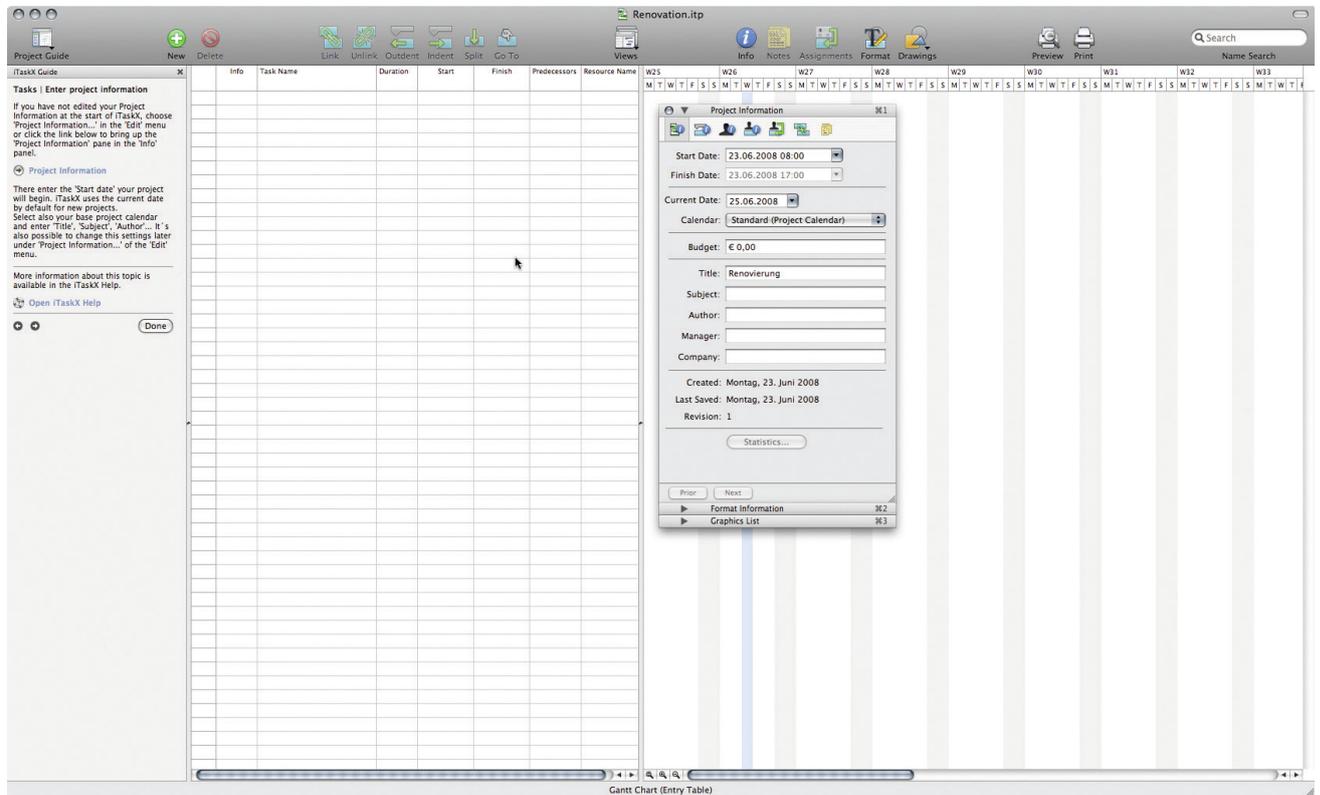


## 1.0 iTAskX Brief Instruction

### 1.1 Tasks

#### 1.1.1 Define the project

If you have not edited your Project Information at the start of iTAskX, choose 'Project Information...' in the 'Edit' menu.



There you can enter the 'Start date'. iTAskX uses the current date by default for new projects. Select also your base project calendar and enter 'Title', 'Subject', 'Author'... It's also possible to change this settings later under 'Project Information...' of the 'Edit' menu.

#### 1.1.2 Define general working times

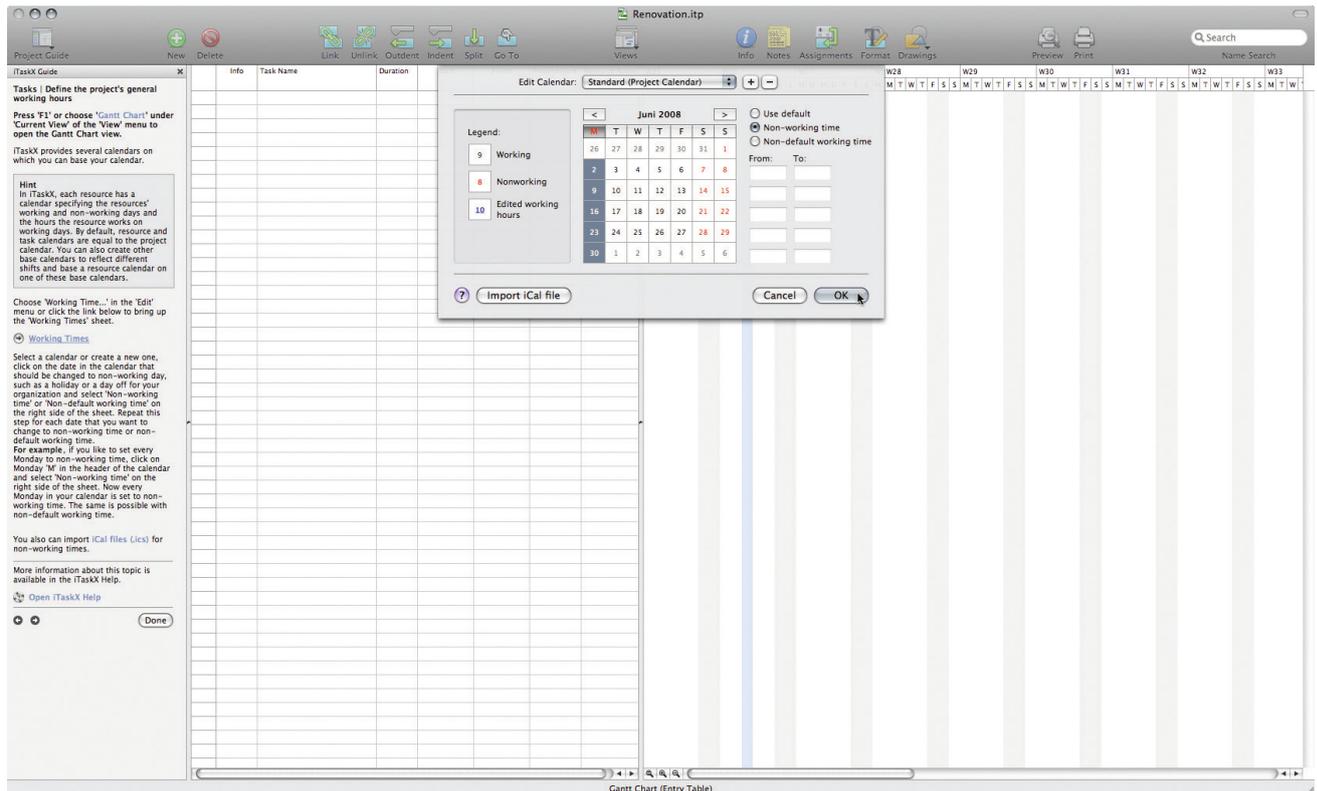
Press 'F1' or choose 'Gantt Chart' under 'Current View' of the 'View' menu to open the Gantt Chart view.

iTAskX provides several calendars on which you can base your calendar.

#### Hint

In iTAskX, each resource has a calendar specifying the resources' working and non-working days and the hours the resource works on working days. By default, resource and task calendars are equal to the project calendar. You can also create other base calendars to reflect different shifts and base a resource calendar on one of these base calendars.

Choose 'Working Time...' in the 'Edit' menu or click the link below to bring up the 'Working Times' sheet.



Select a calendar or create a new one, click on the date in the calendar that should be changed to non-working day, such as a holiday or a day off for your organization and select 'Non-working time' or 'Non-default working time' on the right side of the sheet. Repeat this step for each date that you want to change to non-working time or non-default working time.

For example, if you like to set every Monday to non-working time, click on Monday, 'M' in the header of the calendar and select 'Non-working time' on the right side of the sheet. Now every Monday in your calendar is set to non-working time. The same is possible with non-default working time.

You also can import iCal files (.ics) for non-working times.

### 1.1.3 List the tasks in the project

Press 'F1' or choose 'Gantt Chart' under 'Current View' of the 'View' menu to open the Gantt Chart view.

Begin your project by listing the tasks that have to be done to complete it. List tasks in chronological order. Use descriptive names, preferably including a verb and a noun. For example, „Draft research proposal“ or „Submit research proposal to steering committee“.

First, list the large phases of the project, then add detail to each phase by listing the individual tasks in that phase. Later, you can indent these tasks under each phase to create an outline. If you do not know the details for a phase, you can use the phase as a place holder and complete the details later.

In the 'Duration' column, enter the time required to complete each task, as a number followed by 'm' for minutes, 'h' for hours, 'd' for days, 'w' for weeks or 'mo' for months. Do not enter start and finish dates yet. The iTaskX Guide will help you schedule tasks later.



The screenshot shows the iTaskX interface for a project named 'Renovation\_02.itp'. On the left, there is a 'Task Guide' pane with instructions on how to use the software. The main area displays a Gantt chart and a task list table. A 'Task Information' dialog box is open for the 'Architect' task, showing details such as duration, start/finish dates, and task type.

ID	Task Name	Duration	Start	Finish
1	Architect	2 h	06/23/2008	06/23/2008
2	Preliminary customize	1 d	06/23/2008	06/23/2008
3	Final Plan	0.5 d	06/23/2008	06/23/2008
4	Building permit	1 w	06/23/2008	06/27/2008
5	Offers of	1 w	06/23/2008	06/27/2008
6	Empty spaces	1 d	06/23/2008	06/23/2008
7	Walls	2 d	06/23/2008	06/24/2008
8	Construction loss	0.5 d	06/23/2008	06/23/2008
9	Plastering	1 d	06/23/2008	06/23/2008
10	Grinding	0.5 d	06/23/2008	06/23/2008
11	Delete	2 d	06/23/2008	06/24/2008
12	Toilet facilities	1 d	06/23/2008	06/23/2008
13	Renew lines	3 d	06/23/2008	06/25/2008
14	Lay pipes	5 d	06/23/2008	06/27/2008
15	Acceptance	0.5 d	06/23/2008	06/23/2008
16	Final	0.5 d	06/23/2008	06/23/2008
17	Interior designers	0.5 d	06/23/2008	06/23/2008
18	Colors and Furniture	1 d	06/23/2008	06/23/2008
19	Order new Furniture	1 d	06/23/2008	06/23/2008
20	Furniture delivery	1 d	06/23/2008	06/23/2008

**Note** You can change task scheduling defaults to indicate how much time you want to constitute a day, a week and a month when entering and reviewing durations in a task view. It can also help you synchronize task scheduling with what you've established in the working time calendars for resource availability. To change task scheduling defaults open ,Edit' > ,Project Options...' and choose the ,Calendar' tab.

The screenshot shows the 'Project Options' dialog box with the 'Calendar' tab selected. It displays scheduling defaults such as default start/end times, hours per day, hours per week, and days per month. There are 'Reset to Standard', 'Cancel', and 'OK' buttons.

Option	Value
Default start time	08:00
Default end time	17:00
Hours per day	8.00
Hours per week	40.00
Days per month	20



**Hint**

If you are not sure about the duration, you can enter a ,?' after the duration value to indicate an estimate.

**Milestones**

Mark tasks that represent major events in the project as milestones. To indicate a task as milestone double-click a task and select ,Mark task as milestone' under the ,Task information' pane in the ,Item Information' panel. It is also possible to add a milestone column to each view which contains tables. To add a column open ,Customize Columns...' of the ,View' menu and select the check box ,Milestone'.

**Hint**

Set the duration of a task to ,0' and iTaskX will create a milestone.

**Relevant Toolbar Item**



,New'  
To insert a new row.

**1.1.4 Organize tasks into phases**

Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the Gantt Chart view.

Organize your project by creating a hierarchy. Where tasks are similar or will be completed in the same timeframe, indent them under a summary.

**Hint**  
iTaskX automatically calculates summary task information, such as duration and cost, from subtasks.

To outline tasks into phases, enter the name of each phase followed by the tasks that make up the phase. For example, you might enter the phase Inventory and Research, followed by each task in that phase.

Next, select the tasks that make up the phase and indent them under the task that represents the phase. This will automatically change the task above into a summary. After you make Inventory and Research a summary task, the Duration field shows the total duration of the phase, based on the subtasks indented below it.

**Relevant Toolbar Items**

- Indent'**  
To indent selected task(s) to make them subtasks of the task above.
- Outdent'**  
To outdent selected task(s) to a higher level in the outline.

More information about this topic is available in the iTaskX Help.  
Open iTaskX Help



**Hint**

iTaskX automatically calculates summary task information, such as duration and cost, from subtasks.

To outline tasks into phases, enter the name of each phase followed by the tasks that make up the phase. **For example**, you might enter the phase Inventory and Research, followed by each task in that phase.

Next, select the tasks that make up the phase and indent them under the task that represents the phase.

This will automatically change the task above into a summary. After you make Inventory and Research a summary task, the Duration field shows the total duration of the phase, based on the subtasks indented below it.

**Relevant Toolbar Items**



**,Indent'**

To indent selected task(s) to make them subtasks of the task above.



**,Outdent'**

To outdent selected task(s) to a higher level in the outline.

**1.1.5 Schedule tasks**

Press **,F1'** or choose **,Gantt Chart'** under **,Current View'** of the **,View'** menu to open the Gantt Chart view.

Often a task's start or finish depends on the start or finish of another task. You can schedule these dependent tasks by linking them.

When you link tasks, iTaskX can reschedule the linked tasks for you as changes occur.

You can model a more complex relationship between linked tasks by adding lead or lag time to them.

The screenshot displays the iTaskX interface for a project named 'Renovation\_05.itp'. On the left, a task list table shows the following data:

ID	Task Name	Duration	Start	Finish	Predecessors	Resource Names
1	Renovation	32.25 d	06/23/2008	08/06/2008		
2	Renovation plan	6.75 d	06/23/2008	07/01/2008		
3	Architect	2 h	06/23/2008	06/23/2008		
4	Preliminary customize	1 d	06/23/2008	06/24/2008	3	
5	Final Plan	0.5 d	06/24/2008	06/24/2008	4	
6	Building permit	1 w	06/24/2008	07/01/2008	5	
7	Before the renovation	6 d	07/01/2008	07/09/2008		
8	Offers of	1 w	07/01/2008	07/08/2008	6	
9	Empty spaces	1 d	07/08/2008	07/09/2008	8	
10	Renovation	7 d	07/09/2008	07/16/2008		
11	Walls	2 d	07/09/2008	07/11/2008	9	
12	Construction loss	0.5 d	07/11/2008	07/11/2008	11	
13	Plastering	1 d	07/14/2008	07/15/2008	12	
14	Grinding	0.5 d	07/15/2008	07/15/2008	13	
15	Delete	2 d	07/15/2008	07/17/2008	14	
16	Toilet facilities	1 d	07/17/2008	07/18/2008	15	
17	Electrical	3 d	07/18/2008	07/21/2008		
18	Renew lines	3 d	07/18/2008	07/21/2008	16	
19	Sanitary installation	6 d	07/23/2008	07/31/2008		
20	Lay pipes	5 d	07/23/2008	07/30/2008	18	
21	Acceptance	0.5 d	07/30/2008	07/31/2008	20	
22	Final	0.5 d	07/31/2008	07/31/2008	21	
23	Establishment	3.5 d	07/31/2008	08/06/2008		
24	Interior designers	0.5 d	07/31/2008	08/01/2008	22	
25	Colors and Furniture	1 d	08/01/2008	08/01/2008	24	
26	Order new Furniture	1 d	08/04/2008	08/05/2008	25	
27	Furniture delivery	1 d	08/05/2008	08/06/2008	26	
28						

The Gantt chart on the right visualizes these tasks as a staircase pattern, showing dependencies and durations across weeks W25 to W33. A 'Links' dialog box is open, showing the following links:

Successor Links:			
ID	Task Name	Type	Lag
9	Empty spaces	FS	: 0 d

Predecessor Links:			
ID	Task Name	Type	Lag
6	Building permit	FS	: 0 d



**Hint**

Linking tasks is better than setting start and finish dates manually, because if a task changes or slips, linked tasks are rescheduled automatically.

**Set task relationships**

To create a link between two tasks, click on the desired taskbar and drag the mouse up or down until the cursor change into a chain, then release the mouse button on the other taskbar. Depend of the mouse position inside the taskbar you can create different dependencies like finish-to-start, start-to-start, finish-to-finish or start to finish.

You can also select the two corresponding tasks in the table of the view and link them by clicking on the ,Link‘ button in the toolbar.

Double-clicking the link will open the ,Links‘ pane in the ,Item Information‘ panel where you can edit the properties of that particular link, including lead or lag time. Lead or Lag time is a delay between tasks that have a dependency.

**For example**, if you need a two-day delay between the finish of one task and the start of another, you can establish a finish-to-start dependency and specify two days of lag time. In this case enter lag time ,2d‘ as a positive value.

**Relevant Toolbar Items**



**,Link‘**

To link two tasks.



**,Unlink‘**

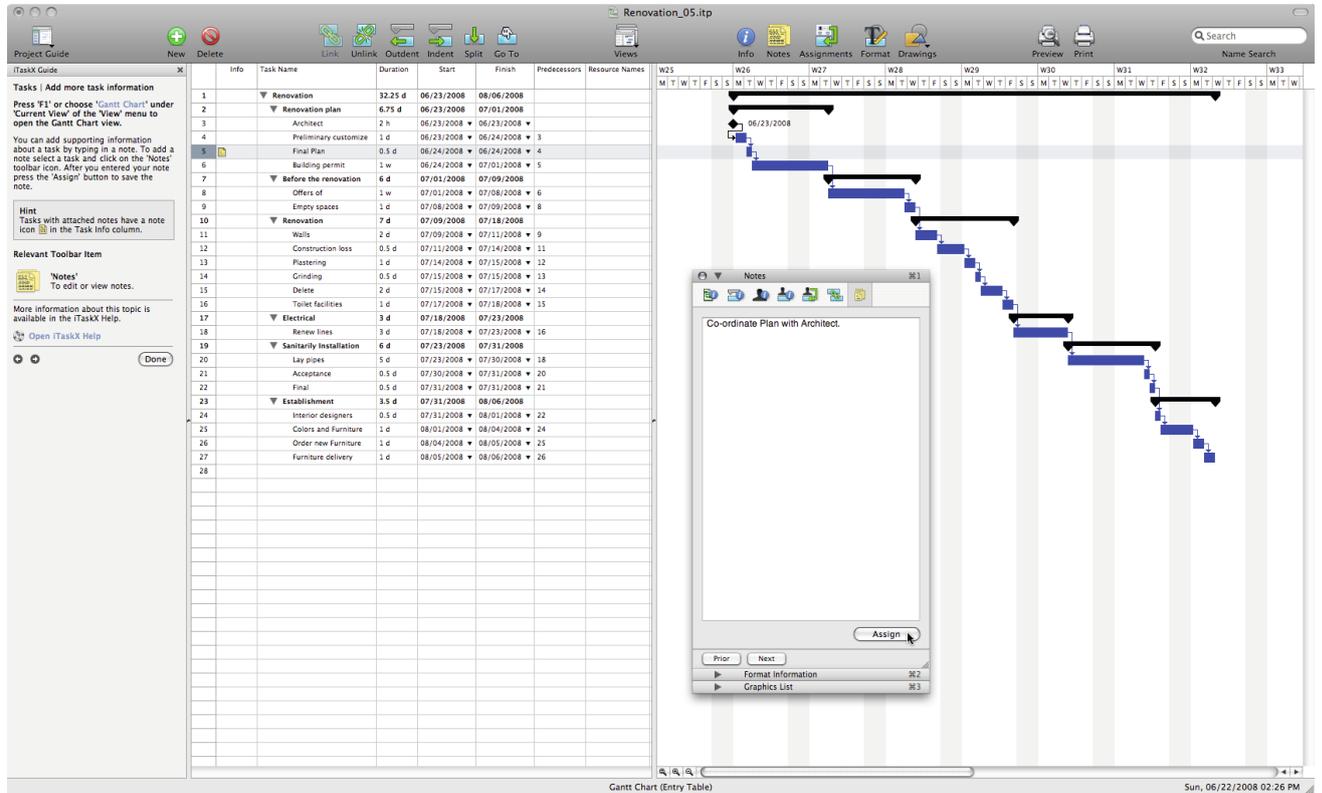
To break the link for the selected tasks.



### 1.1.6 Add more task information

Press **,F1'** or choose **,Gantt Chart'** under **,Current View'** of the **,View'** menu to open the Gantt Chart view.

You can add supporting information about a task by typing in a note. To add a note select a task and click on the **,Notes'** toolbar icon. After you entered your note press the **,Assign'** button to save the note.



#### Hint

Tasks with attached notes have a note icon  in the Task Info column.

#### Relevant Toolbar Item



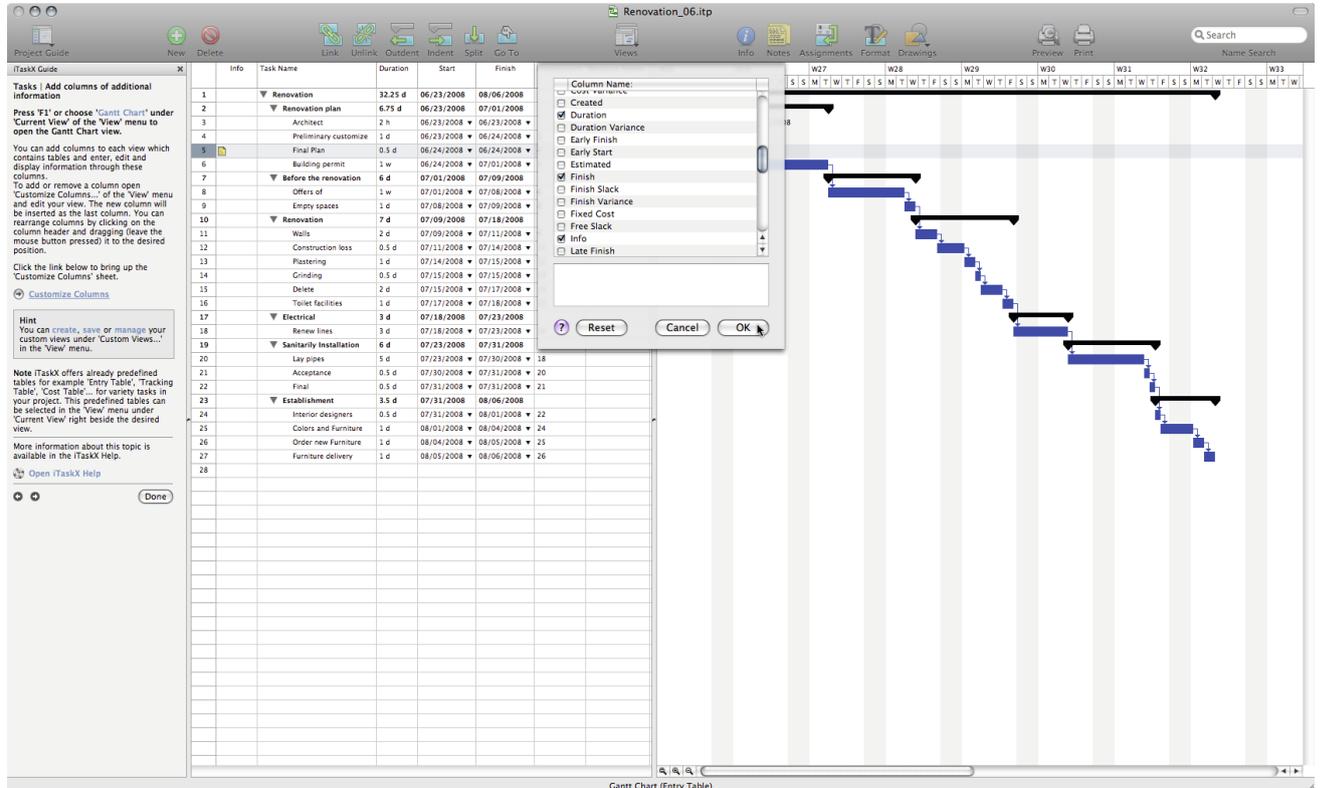
**,Notes'**  
To edit or view notes.



### 1.1.7 Add columns of additional information

Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the Gantt Chart view.

You can add columns to each view which contains tables and enter, edit and display information through these columns.



To add or remove a column open ,Customize Columns...' of the ,View' menu and edit your view. The new column will be inserted as the last column. You can rearrange columns by clicking on the column header and dragging (leave the mouse button pressed) it to the desired position.

**Hint**  
You can create, save or manage your custom views under ,Custom Views...' in the ,View' menu.

**Note** iTaskX offers already predefined tables for example ,Entry Table', ,Tracking Table', ,Cost Table'... for variety tasks in your project. This predefined tables can be selected in the ,View' menu under ,Current View' right beside the desired view.

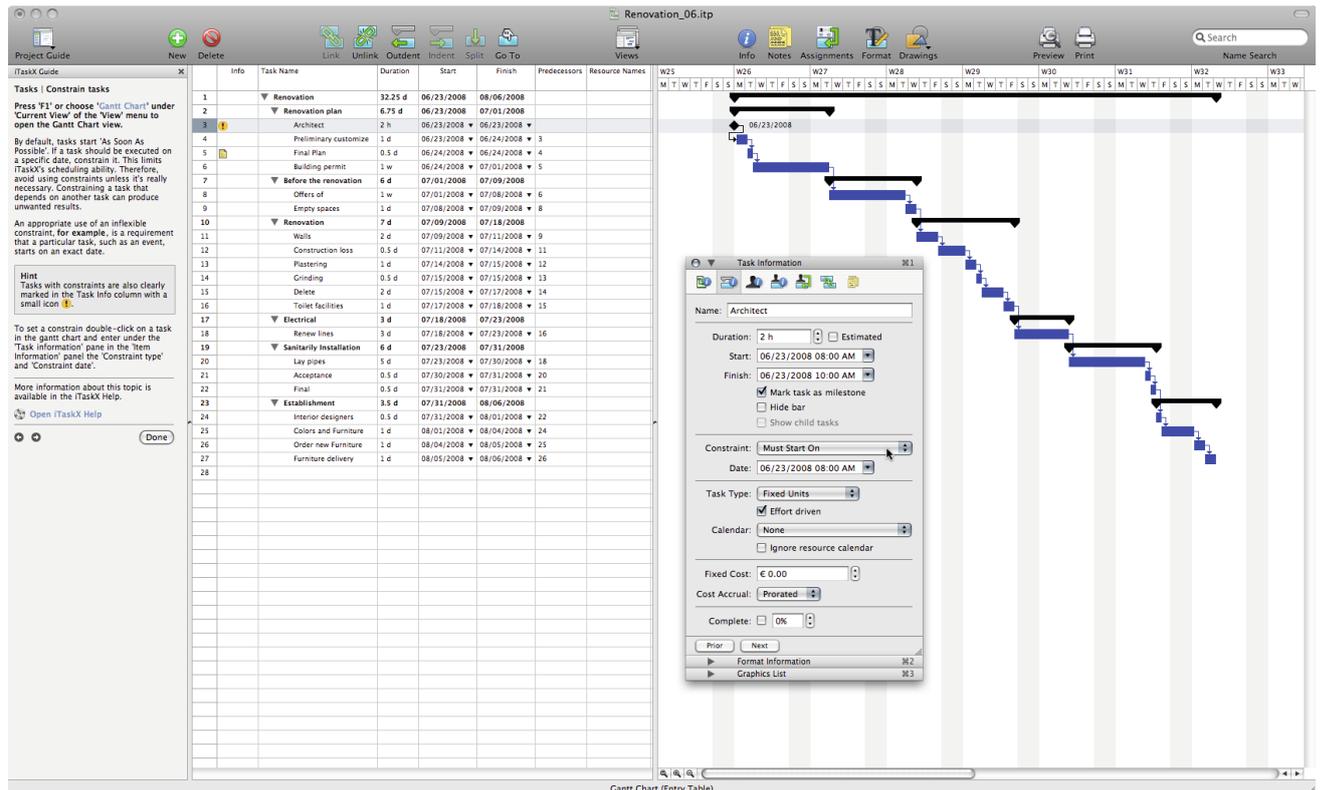


### 1.1.8 Constrain tasks

Press **F1** or choose **Gantt Chart** under **Current View** of the **View** menu to open the Gantt Chart view.

By default, tasks start **As Soon As Possible**. If a task should be executed on a specific date, constrain it. This limits iTaskX's scheduling ability. Therefore, avoid using constraints unless it's really necessary. Constraining a task that depends on another task can produce unwanted results.

An appropriate use of an inflexible constraint, **for example**, is a requirement that a particular task, such as an event, starts on an exact date.



#### Hint

Tasks with constraints are also clearly marked in the Task Info column with a small icon .

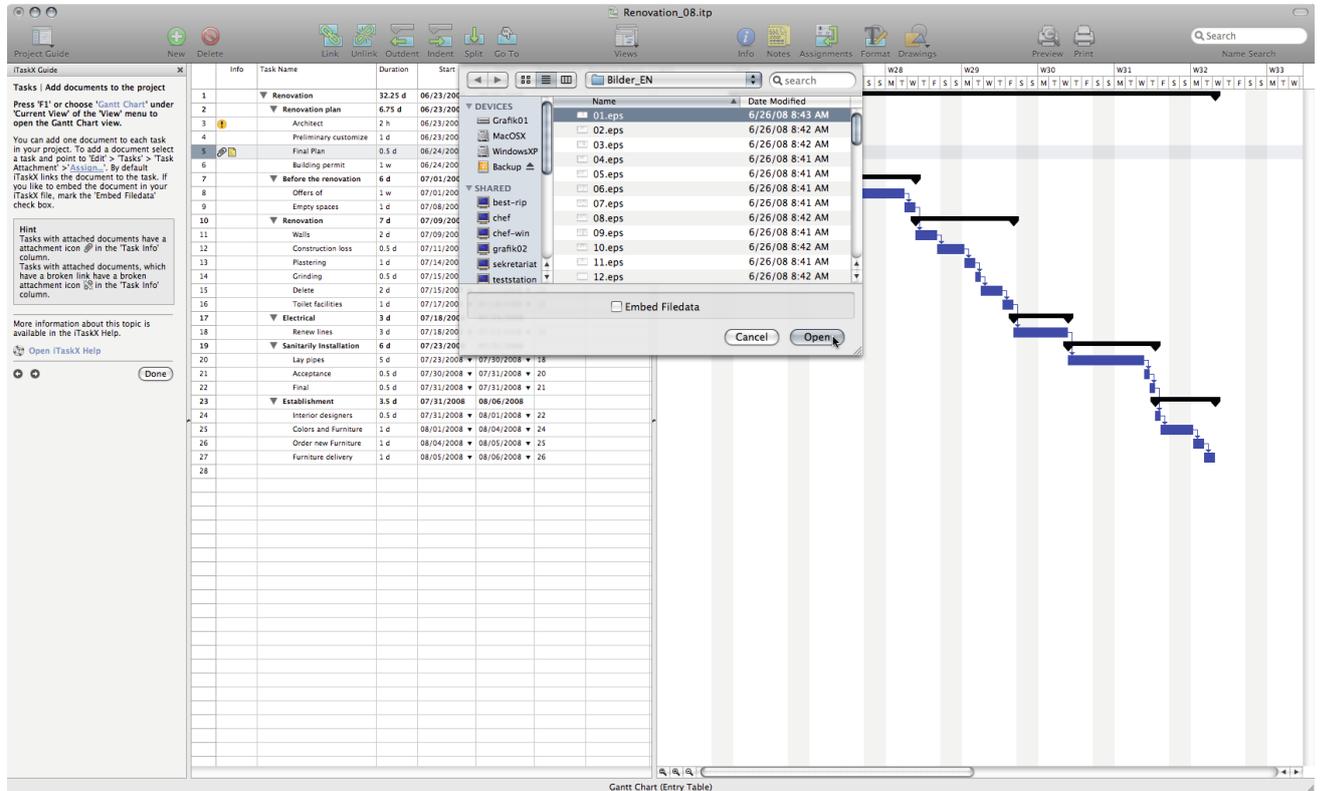
To set a constrain double-click on a task in the gantt chart and enter under the **Task information** pane in the **Item Information** panel the **Constraint type** and **Constraint date**.



### 1.1.9 Add documents to the project

Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the Gantt Chart view.

You can add one document to each task in your project. To add a document select a task and point to ,Edit' > ,Tasks' > ,Task Attachment' > ,Assign...'. By default iTaskX links the document to the task. If you like to embed the document in your iTaskX file, mark the ,Embed Filedata' check box.



#### Hint

Tasks with attached documents have an attachment icon  in the ,Task Info' column. Tasks with attached documents, which have a broken link have a broken attachment icon  in the ,Task Info' column.

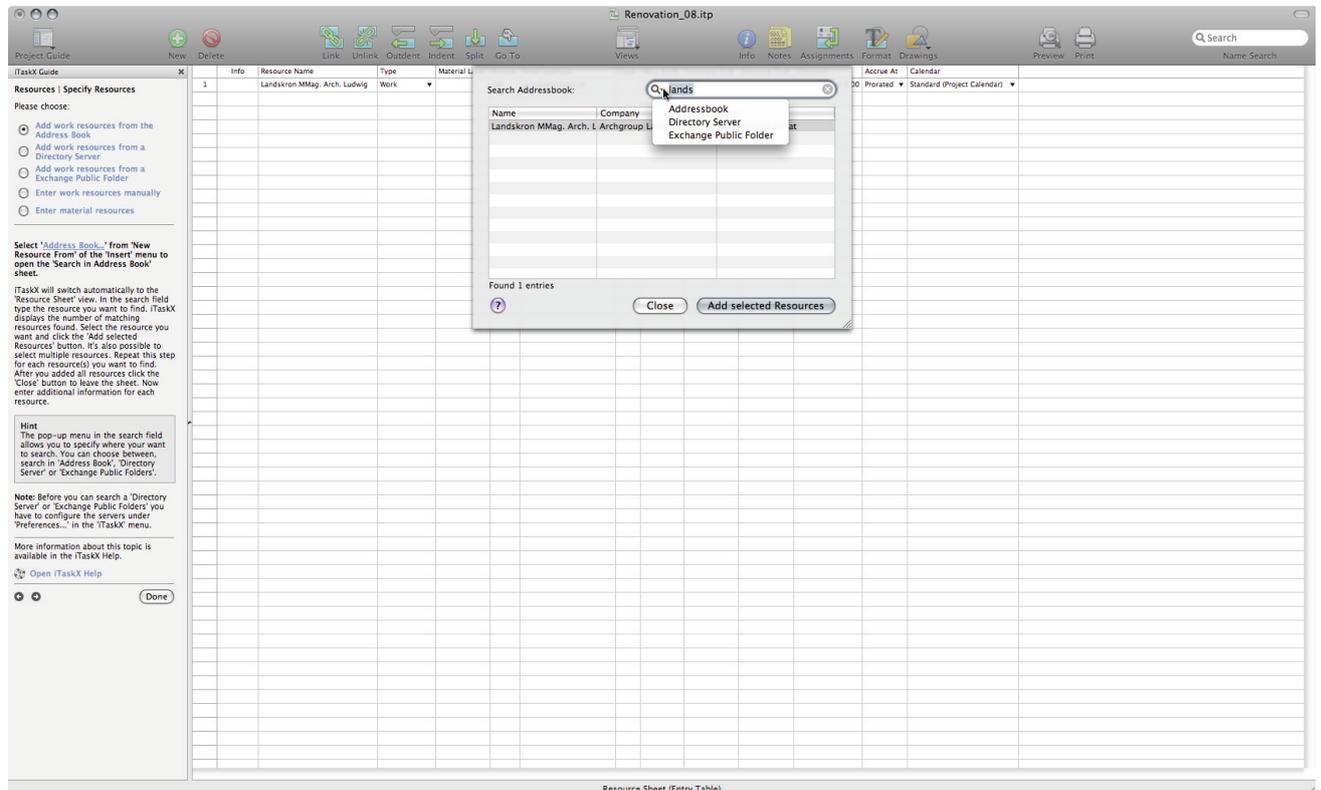


## 1.2 Resources

### 1.2.1 Specify people and equipment for the project

#### Add work resources from the Address Book

Select ,Address Book...' from ,New Resource From' of the ,Insert' menu to open the ,Search in Address Book' sheet.



iTaskX will switch automatically to the ,Resource Sheet' view. In the search field type the resource you want to find. iTTaskX displays the number of matching resources found. Select the resource you want and click the ,Add selected Resources' button. It's also possible to select multiple resources. Repeat this step for each resource(s) you want to find. After you added all resources click the ,Close' button to leave the sheet. Now enter additional information for each resource.

#### Hint

The pop-up menu in the search field allows you to specify where you want to search. You can choose between, search in ,Address Book', ,Directory Server' or ,Exchange Public Folders'.

**Note:** Before you can search a ,Directory Server' or ,Exchange Public Folders' you have to configure the servers under ,Preferences...' in the ,iTTaskX' menu.

#### Add work resources from a Directory Server

Select ,Directory Server...' from ,New Resource From' of the ,Insert' menu to open the ,Search in Directory Server' sheet.

iTaskX will switch automatically to the ,Resource Sheet' view. In the search field type the resource you want to find. iTTaskX displays the number of matching resources found. Select the resource you want and click the ,Add selected Resources' button. It's also possible to select multiple resources. Repeat this step for each resource(s) you want to find. After you added all resources click the ,Close' button to leave the sheet. Now enter additional information for each resource.



**Hint**

The pop-up menu in the search field allows you to specify where you want to search. You can choose between, search in ,Address Book', ,Directory Server' or ,Exchange Public Folders'.

**Note:** Before you can search a ,Directory Server' or ,Exchange Public Folders' you have to configure the servers under ,Preferences...' in the ,iTAskX' menu.

**Add work resources from a Exchange Public Folder**

Select ,Exchange Public Folder...' from ,New Resource From' of the ,Insert' menu to open the ,Search in Exchange Public Folder' sheet.

iTaskX will switch automatically to the ,Resource Sheet' view. In the search field type the resource you want to find. iTAskX displays the number of matching resources found. Select the resource you want and click the ,Add selected Resources' button. It's also possible to select multiple resources. Repeat this step for each resource(s) you want to find. After you added all resources click the ,Close' button to leave the sheet. Now enter additional information for each resource.

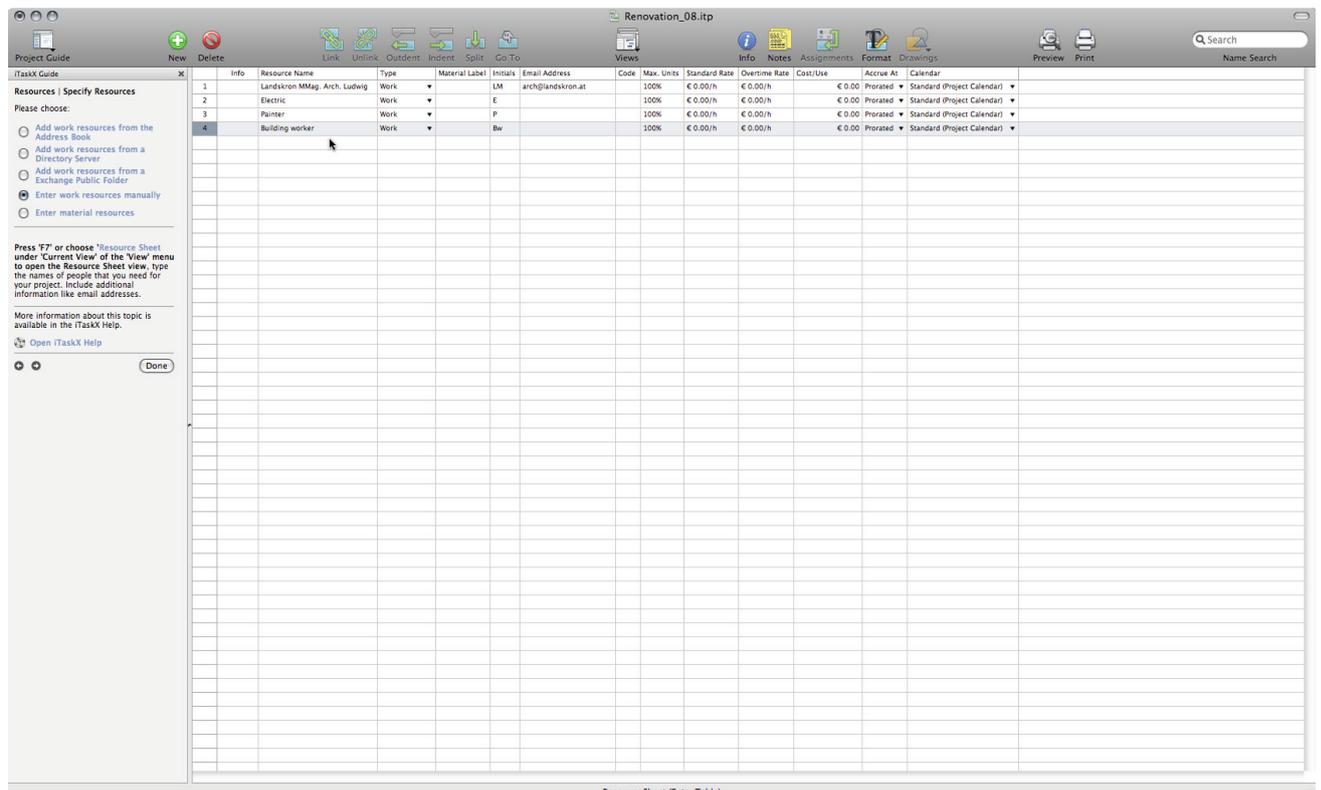
**Hint**

The pop-up menu in the search field allows you to specify where you want to search. You can choose between, search in ,Address Book', ,Directory Server' or ,Exchange Public Folders'.

**Note:** Before you can search a ,Directory Server' or ,Exchange Public Folders' you have to configure the servers under ,Preferences...' in the ,iTAskX' menu.

**Enter work resources manually**

Press ,F7' or choose ,Resource Sheet under ,Current View' of the ,View' menu to open the Resource Sheet view, type the names of people that you need for your project. Include additional information like email addresses.





## Enter material resources

Press ,F7' or choose ,Resource Sheet' under ,Current View' of the ,View' menu to open the Resource Sheet view.

### Entering Material Resources

Material resources are supplies, stock, or other consumable items used to complete tasks in a project. Examples of material resources could be e.g. concrete, steel, pipe, wood and glass. When you set up a material resource, you define the material label, or unit of measurement, for the material, such as cubic yards, tons, or boxes. When you assign a material resource to a task, you specify the material consumption for the assignment, for example, 10 tons of steel for a specific assignment.

#### To enter a material resource:

1. In the ,Resource Name' field of the view, type the name of the material resource.
2. In the ,Type' field, select ,Material'.
3. In the ,Material Label' field, enter a label that indicates the units used to measure this material (for example, yards, ton, or boxes).

The screenshot shows the iTaskX software interface with the 'Resource Sheet (Entry Table)' view. The table contains the following data:

	Info	Resource Name	Type	Material Label	Initials	Email Address	Code	Max. Units	Standard Rate	Overtime Rate	Cost/Use	Accrue At	Calendar
1		Landskron MMag. Arch. Ludwig	Work		LM	arch@landskron.at		100%	€ 100.00/h	€ 0.00/h	€ 0.00	Prorated	Standard (Project Calendar)
2		Electric	Work		E			100%	€ 50.00/h	€ 0.00/h	€ 0.00	Prorated	Standard (Project Calendar)
3		Painter	Work		P			100%	€ 50.00/h	€ 0.00/h	€ 0.00	Prorated	Standard (Project Calendar)
4		Building worker	Work		Bw			100%	€ 45.00/h	€ 0.00/h	€ 0.00	Prorated	Standard (Project Calendar)
5		Steel	Material	Meter	S				€ 45.00		€ 0.00	Prorated	
6		Wood	Material	Meter	W				€ 20.00		€ 0.00	Prorated	

A dropdown menu is open for the 'Type' field of the 'Wood' resource, showing 'Material' (selected) and 'Work' options.

The left sidebar contains the following text:

**Resources | Specify Resources**

Please choose:

- Add work resources from the Address Book
- Add work resources from a Directory Server
- Add work resources from an Exchange Public Folder
- Enter work resources manually
- Enter material resources

Press 'F7' or choose 'Resource Sheet' under 'Current View' of the 'View' menu to open the Resource Sheet view.

**Entering Material Resources**

Material resources are supplies, stock, or other consumable items used to complete tasks in a project. Examples of material resources could be e.g. concrete, steel, pipe, wood and glass. When you set up a material resource, you define the material label, or unit of measurement, for the material, such as cubic yards, tons, or boxes. When you assign a material resource to a task, you specify the material consumption for the assignment, for example, 10 tons of steel for a specific assignment.

**To enter a material resource:**

1. In the 'Resource Name' field of the view, type the name of the material resource.
2. In the 'Type' field, select 'Material'.
3. In the 'Material Label' field, enter a label that indicates the units used to measure this material (for example, yards, ton, or boxes).

More information about this topic is available in the iTaskX Help.

[Open iTaskX Help](#)



### 1.2.2 Define working times for resources

Press ,F7' or choose ,Resource Sheet' under ,Current View' of the ,View' menu to open the Resource Sheet view.

If resource working common hours differ from the project calendar, first define an additional calendar.

Choose ,Working Time...' in the ,Edit' menu or click the link below to bring up the ,Working Times' sheet.

The screenshot shows the iTaskX software interface. The main window displays the 'Resource Sheet (Entry Table)' with columns for Resource Name and Type. A dialog box titled 'Edit Calendar: Standard (Project Calendar)' is open, showing a calendar for June 2008. The dialog includes a legend with three options: 'Working' (9), 'Nonworking' (8), and 'Edited working hours' (10). The calendar grid shows the days of the month, with some days highlighted in red. The dialog also has radio buttons for 'Use default', 'Non-working time', and 'Non-default working time', and fields for 'From:' and 'To:'. Buttons for 'Import iCal file', 'Cancel', and 'OK' are visible at the bottom of the dialog.

#### Hint

In iTaskX, each resource has a calendar specifying the resources working and non-working days and the hours the resource works on working days. By default, resource and task calendars are equal to the project calendar.

Select a calendar or create a new one, click on the date in the calendar that should be changed to non-working day, such as a holiday or a day off for your organization and select ,Non-working time' or ,Non-default working time' on the right side of the sheet. Repeat this step for each date that you want to change to non-working time or non-default working time.

**For example**, if you like to set every Monday to non-working time, click on Monday ,M' in the header of the calendar and select ,Non-working time' on the right side of the sheet. Now every Monday in your calendar is set to non-working time. The same is possible with non-default working time.

You also can import iCal files (.ics) for non-working times.

To set a resource calendar, click in the ,Calendar' column of the view and select your calendar.



### 1.2.3 Assign people and equipment to tasks

Press **F1** or choose **Gantt Chart** under **Current View** of the **View** menu to open the Gantt Chart view.

For assigning resources, select the desired task and press the **Assignments** button in the toolbar to open the **Resource Assignments** pane in the **Info** panel. All added resources are listed. To assign a resource, activate the assign symbol left beside the desired resource name and then click on the **Assign** button. It's also possible to mark more resources and assign them at once to a task.

The screenshot displays the iTaskX software interface. On the left, a task list table is visible with columns for Task Name, Duration, Start, Finish, Predecessors, and Resource Names. The main area shows a Gantt chart with tasks represented by bars and arrows indicating dependencies. A 'Resource Assignments' pane is open, showing a list of resources with checkboxes and an 'Assign' button. The 'Info' panel on the left contains instructions for assigning resources.

Task Name	Duration	Start	Finish	Predecessors	Resource Names
Renovation	32.25 d	06/23/2008	08/06/2008		
Renovation plan	6.75 d	06/23/2008	07/01/2008		
Architect	2 h	06/23/2008	06/23/2008		Architect
Preliminary customize	1 d	06/23/2008	06/24/2008	3	
Final Plan	0.5 d	06/24/2008	06/24/2008	4	Architect
Building permit	1 w	06/24/2008	07/01/2008	5	
Before the renovation	6 d	07/01/2008	07/09/2008		
Offers of	1 w	07/01/2008	07/08/2008	6	Building worker
Empty spaces	1 d	07/08/2008	07/09/2008	8	Building worker
Renovation	7.4 d	07/09/2008	07/18/2008		
Walls	2 d	07/09/2008	07/11/2008	9	Building worker
Construction loss	0.5 d	07/11/2008	07/14/2008	11	Building worker
Plastering	1 d	07/14/2008	07/15/2008	12	Building worker
Grinding	0.5 d	07/15/2008	07/15/2008	13	Building worker
Delete	2 d	07/15/2008	07/17/2008	14	Building worker
Toilet facilities	1 d	07/17/2008	07/18/2008	15	Building worker
Electrical	3 d	07/18/2008	07/21/2008		
Renew lines	3 d	07/18/2008	07/21/2008	16	Electric
Sanitarily installation	6 d	07/23/2008	07/31/2008		
Lay pipes	5 d	07/23/2008	07/30/2008	18	Building worker
Acceptance	0.5 d	07/30/2008	07/31/2008	20	Architect
Final	0.5 d	07/31/2008	07/31/2008	21	Architect
Establishment	3.5 d	07/31/2008	08/06/2008		
Interior designers	0.5 d	07/31/2008	08/01/2008	22	Architect
Colors and Furniture	1 d	08/01/2008	08/04/2008	24	Architect
Order new Furniture	1 d	08/04/2008	08/05/2008	25	
Furniture delivery	1 d	08/05/2008	08/06/2008	26	

In that pane it's also possible to create a new **work** resources. To create a new resource, double-click in a empty row in the **Resource Name** column and enter the resource name. If you want to add additional information to the resource(s) go to the **Resource Sheet** view and make your completions there.

**Notes** If you like to remove a assignment from a task, deactivate the assign symbol left beside the desired resource name and then click on the **Assign** button. To remove a resource from your project, select the desired resource and click on the **Minus** button.

#### Tipp

To assign resource(s) to more tasks, hold down the **COMMAND** key, select your tasks and click on the **Assignments** button in the toolbar.

#### Relevant Toolbar Item



#### **Assignments**

To add, replace or remove resource assignments for the selected task.



### 1.2.4 Add more resource information

Press ,F7' or choose ,Resource Sheet' under ,Current View' of the ,View' menu to open the Resource Sheet view.

The screenshot shows the iTaskX software interface. The main window displays a 'Resource Sheet (Entry Table)' with the following data:

	Info	Resource Name	Type	Material Label	Initials	Email Address	Code	Max. Units	Standard Rate	Overtime Rate	Cost/Use	Accrue At	Calendar
1		Architect	Work		A	arch@landskron.at		100%	€ 100.00/h	€ 0.00/h	€ 0.00	Prorated	Standard (Project Calendar)
2		Electric	Work		E			100%	€ 50.00/h	€ 0.00/h	€ 0.00	Prorated	Standard (Project Calendar)
3		Painter	Work		P			100%	€ 50.00/h	€ 0.00/h	€ 0.00	Prorated	Standard (Project Calendar)
4		Building worker	Work		Bw			100%	€ 45.00/h	€ 0.00/h	€ 0.00	Prorated	Standard (Project Calendar)
5		Steel	Material	Meter	S				€ 45.00		€ 0.00	Prorated	
6		Wood	Material	Meter	W				€ 20.00		€ 0.00	Prorated	

A 'Notes' dialog box is open over the table, containing the text 'Company Max Muster.' and an 'Assign' button. The dialog box also has 'Prior' and 'Next' buttons and a list of items: 'Format Information' (M2) and 'Graphics List' (M3).

You can add supporting information about a resource by adding a note. To add a note select a resource and click on the ,Notes' toolbar icon.

#### Relevant Toolbar Item



**,Notes'**  
To edit or view notes.



### 1.2.5 Add columns of additional information

Press ,F7' or choose ,Resource Sheet' under ,Current View' of the ,View' menu to open the Resource Sheet view.

You can add columns to each view which contains tables and enter, edit and display information through these columns.

To add or remove a column open ,Customize Columns...' of the ,View' menu and edit your view. The new column will be inserted as the last column. You can rearrange columns by clicking on the column header and dragging it to the desired position.

The screenshot shows the iTaskX application window titled 'Renovation\_10.itp'. The main window displays a 'Resource Sheet (Entry Table)' with columns for 'Info', 'Resource Name', 'Type', 'Material Label', 'Initials', 'Email', 'Cost/Use', 'Accrue At', and 'Calendar'. A 'Customize Columns' dialog box is open in the center, listing various columns with checkboxes to select or deselect them. The dialog box has 'Reset', 'Cancel', and 'OK' buttons at the bottom. On the left side of the window, there is a 'Project Guide' sidebar with a 'Resources' section containing instructions on how to add columns and customize views. The instructions include: 'Press F7 or choose Resource Sheet under Current View of the View menu to open the Resource Sheet view.', 'You can add columns to each view which contains tables and enter, edit and display information through these columns.', 'To add or remove a column open Customize Columns... of the View menu and edit your view. The new column will be inserted as the last column. You can rearrange columns by clicking on the column header and dragging it to the desired position.', and 'Click the link below to bring up the Customize Columns sheet.' There is also a 'Hint' section: 'You can create, save or manage your custom views under Custom Views... in the View menu.' and a 'Note' section: 'iTaskX offers already predefined tables for example Entry Table, Tracking Table, Cost Table... for variety tasks in your project. This predefined tables can be selected in the View menu under Current View right beside the desired view.' At the bottom of the sidebar, there is a link to 'Open iTaskX Help' and a 'Done' button.

#### Hint

You can create, save or manage your custom views under ,Custom Views...' in the ,View' menu.

**Note** iTaskX offers already predefined tables for example ,Entry Table', ,Tracking Table', ,Cost Table'... for variety tasks in your project. This predefined tables can be selected in the ,View' menu under ,Current View' right beside the desired view.



## 1.3 Track

### 1.3.1 Save as baseline plan to compare with later versions

Press ,F2' or choose ,Tracking Gantt' under ,Current View' of the ,View' menu to open the Tracking Gantt view.

The screenshot displays the iTaskX software interface in the 'Tracking Gantt' view. On the left, a task list is visible with columns for task name, actual start, actual finish, percentage complete, and duration. The tasks are organized into a hierarchy, with 'Renovation' as the main category. The Gantt chart on the right shows a timeline from 06/23/2008 to W33, with bars representing task durations and progress. A 'Tracking' menu is open, showing options like 'Update Task...', 'Update Project...', 'Save Baseline', and 'Clear Baseline'. The 'Save Baseline' option is highlighted.

After completing your project plan, it's recommended to save a baseline. Once your project is underway, the baseline allows you to compare the updated schedule and actual progress against your original plan.

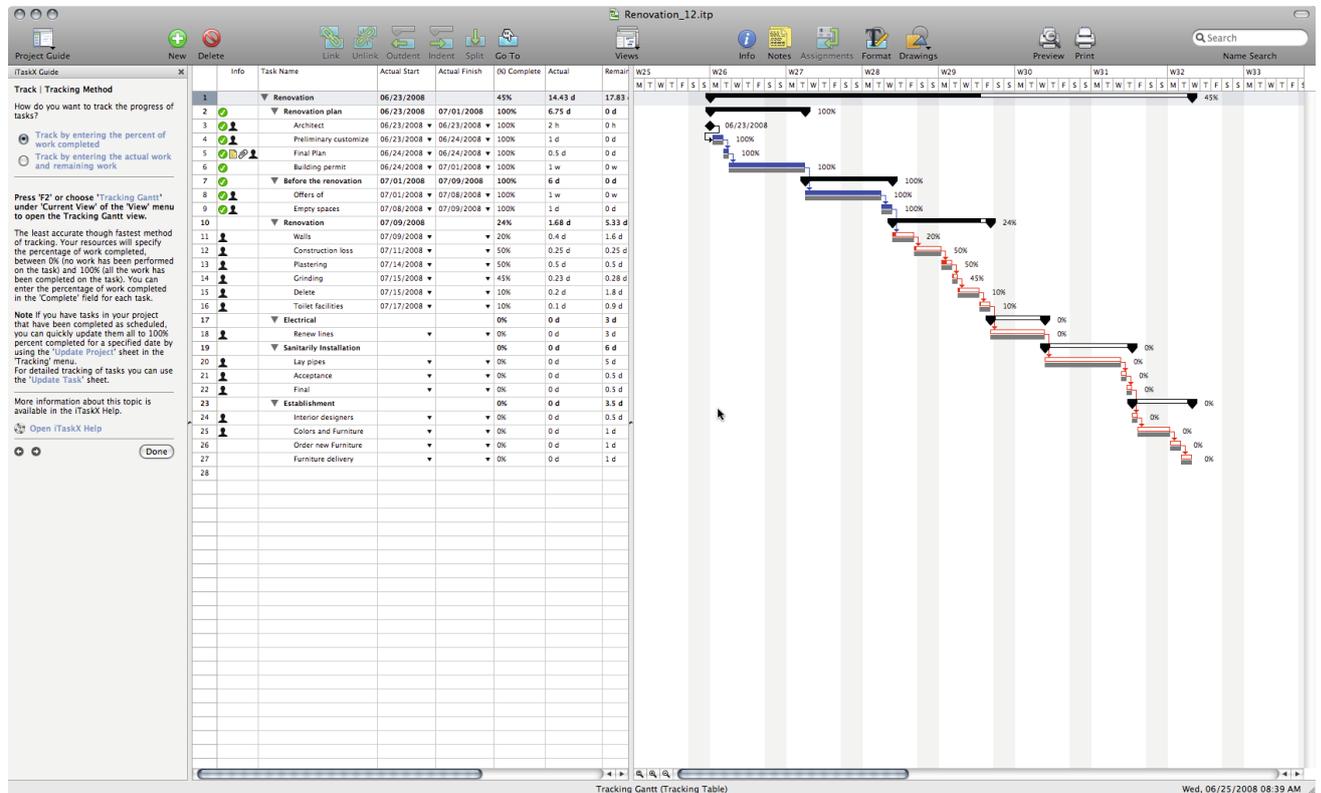
To save a baseline select ,Save Baseline' from the ,Tracking' menu.



### 1.3.2 Prepare to track the progress of your project

How do you want to track the progress of tasks?  
Track by entering the percent of work completed

Press ,F2' or choose ,Tracking Gantt' under ,Current View' of the ,View' menu to open the Tracking Gantt view.



The least accurate though fastest method of tracking. Your resources will specify the percentage of work completed, between 0% (no work has been performed on the task) and 100% (all the work has been completed on the task). You can enter the percentage of work completed in the ,Complete' field for each task.

**Note** If you have tasks in your project that have been completed as scheduled, you can quickly update them all to 100% percent completed for a specified date by using the ,Update Project' sheet in the ,Tracking' menu. For detailed tracking of tasks you can use the ,Update Task' sheet.



## How do you want to track the progress of tasks? Track by entering the actual work and remaining work

Press ,F2' or choose ,Tracking Gantt' under ,Current View' of the ,View' menu to open the Tracking Gantt view.

The screenshot shows the iTaskX interface with a task list on the left and a Tracking Gantt chart on the right. A dialog box titled 'Update task progress of: (1) Renovation' is open, showing the following details:

- Duration: 32.25 d
- % Complete: 45%
- Actual Dur.: 14.43 d
- Remaining Dur.: 17.83 d
- Actual Start: 06/23/2008 08:00 AM
- Current Start: 06/23/2008 08:00 AM
- Finish: 08/06/2008 10:00 AM

The task list on the left includes tasks such as 'Renovation plan', 'Architect', 'Preliminary customize', 'Final Plan', 'Building permit', 'Before the renovation', 'Offers of', 'Empty spaces', 'Renovation', 'Walls', 'Construction loss', 'Plastering', 'Grinding', 'Delete', 'Toilet facilities', 'Electrical', 'Renew lines', 'Sanitarily installation', 'Lay pipes', 'Acceptance', 'Final', 'Establishment', 'Interior designers', 'Colors and Furniture', 'Order new Furniture', and 'Furniture delivery'.

A better accurate method of tracking. Your resources will specify how much work has been on each task and how much work is left to do. To enter actual work and remaining work, point to ,View' > ,Tables' > ,Work Table' and then type the values in the ,Actual Work' and ,Remaining Work' field for each task.



### 1.3.3 Make changes to the project

Press ,F6' or choose ,Task Usage' under ,Current View' of the ,View' menu to open the Task Usage view.

ID	Info	Name	Work	Overtime Work	Duration	Assignment Units	Start	Finish	Overall/located
1		Renovation	202 h	0 h	32.25 d		06/23/2008	08/06/2008	
2		Renovation plan	14 h	0 h	6.75 d		06/23/2008	07/01/2008	
3		Architect	2 h	0 h	2 h	100%	06/23/2008	06/23/2008	
4		Preliminary customize	8 h	0 h	1 d		06/23/2008	06/24/2008	
5		Architect	8 h	0 h		100%	06/23/2008	06/24/2008	
6		Final Plan	4 h	0 h	0.5 d		06/24/2008	06/24/2008	
7		Architect	4 h	0 h		100%	06/24/2008	06/24/2008	
8		Building permit	0 h	0 h	1 w		06/24/2008	07/01/2008	
9		Before the renovation	48 h	0 h	6 d		07/01/2008	07/09/2008	
10		Offers of	40 h	0 h	1 w		07/01/2008	07/08/2008	
11		Building worker	40 h	0 h		100%	07/01/2008	07/08/2008	
12		Empty spaces	8 h	0 h	1 d		07/08/2008	07/09/2008	
13		Building worker	8 h	0 h		100%	07/08/2008	07/09/2008	
14		Renovation	56 h	0 h	7 d		07/09/2008	07/18/2008	
15		Walls	16 h	0 h	2 d		07/09/2008	07/11/2008	
16		Building worker	16 h	0 h		100%	07/09/2008	07/11/2008	
17		Construction loss	4 h	0 h	0.5 d		07/11/2008	07/14/2008	
18		Building worker	4 h	0 h		100%	07/11/2008	07/14/2008	
19		Plastering	8 h	0 h	1 d		07/14/2008	07/15/2008	
20		Building worker	8 h	0 h		100%	07/14/2008	07/15/2008	
21		Grinding	4 h	0 h	0.5 d		07/15/2008	07/15/2008	
22		Building worker	4 h	0 h		100%	07/15/2008	07/15/2008	
23		Delete	16 h	0 h	2 d		07/15/2008	07/17/2008	
24		Building worker	16 h	0 h		100%	07/15/2008	07/17/2008	
25		Toilet facilities	8 h	0 h	1 d		07/17/2008	07/18/2008	
26		Building worker	8 h	0 h		100%	07/17/2008	07/18/2008	
27		Electrical	24 h	0 h	3 d		07/18/2008	07/23/2008	
28		Renew lines	24 h	0 h	3 d		07/18/2008	07/23/2008	
29		Electric	24 h	0 h		100%	07/18/2008	07/23/2008	
30		Sanitarily Installation	48 h	0 h	6 d		07/23/2008	07/31/2008	
31		Lay pipes	40 h	0 h	5 d		07/23/2008	07/30/2008	
32		Building worker	40 h	0 h		100%	07/23/2008	07/30/2008	
33		Acceptance	4 h	0 h	0.5 d		07/30/2008	07/31/2008	
34		Architect	4 h	0 h		100%	07/30/2008	07/31/2008	
35		Final	4 h	0 h	0.5 d		07/31/2008	07/31/2008	
36		Architect	4 h	0 h		100%	07/31/2008	07/31/2008	
37		Establishment	12 h	0 h	3.5 d		07/31/2008	08/06/2008	
38		Interior designers	4 h	0 h	0.5 d		07/31/2008	08/01/2008	
39		Architect	4 h	0 h		100%	07/31/2008	08/01/2008	
40		Colors and furniture	8 h	0 h	1 d		08/01/2008	08/04/2008	
41		Architect	8 h	0 h		100%	08/01/2008	08/04/2008	
42		Order new Furniture	0 h	0 h	1 d		08/04/2008	08/05/2008	
43		Furniture delivery	0 h	0 h	1 d		08/05/2008	08/06/2008	

That view shows tasks and the resource assignments for each task. You can edit the following:

**Work** describes the person-hours or effort needed to complete a task or assignment. The total work for a task is the sum of the work for all of its assignments.

**Duration** describes the total time required to perform a task. It is calculated by looking at the working time spanned by all the resource assignments on the task.

**Assignment Units** represent the percentage of the resource time assigned to perform a task. To assign multiple resources such as e.g. ,2 carpenters', you can set the assignment units to ,200%'.

### 1.3.4 Identify critical tasks

Press ,F2' or choose ,Tracking Gantt' under ,Current View' of the ,View' menu to open the Tracking Gantt view.

By default, iTaskX defines a task as critical if it has zero days of slack. However, you can change this definition and make a task critical if it has, for example, one or two days of slack. Making a task with slack critical can be helpful if you want to be alerted to tasks that are becoming critical when you still have some buffer.

Slack is determined by the early finish and late finish dates of the tasks in your schedule. An early finish date is the earliest date that the task could finish, based on its start date and scheduled duration. A late finish date is the latest date that the task can finish without delaying the project finish. The difference between early finish and late finish dates determines the amount of slack. For critical path tasks (tasks that have no slack), the early finish and late finish dates are identical.



To set the slack which defines a task as critical open the ,Calculation‘ tab of the ,Project Options‘ sheet in the ,Edit‘ menu or click the link below to bring up the ,Project Options‘ sheet.

The screenshot displays the 'Project Options' dialog box in the 'Calculation' tab. The 'Default fixed costs accrual' is set to 'Prorated'. The 'Tasks are critical if slack <=:' is set to '2' days. The 'Default standard rate' and 'Default overtime rate' are both set to '€ 0.00/h'. The 'Currency symbol' is set to '€'. The dialog box has 'Reset to Standard', 'Cancel', and 'OK' buttons. In the background, a Gantt chart is visible with tasks such as 'Renovation', 'Architect', 'Preliminary customize', 'Final Plan', 'Building permit', 'Before the renovation', 'Offers of', 'Empty spaces', 'Renovation', 'Walls', 'Construction loss', 'Plastering', 'Grinding', 'Delete', 'Toilet facilities', 'Electrical', 'Renov lines', 'Sanitarily installation', 'Lay pipes', 'Acceptance', 'Final', 'Establishment', 'Interior designers', 'Colors and furniture', 'Order new Furniture', and 'Furniture delivery'. The Gantt chart shows task durations and progress bars.

In the ,Tracking Gantt‘ view, critical tasks appear in red. To change the appearance of tasks, choose ,Bar Styles...‘ in the ,Format‘ menu or click the link below to bring up the ,Bar Styles‘ sheet.

The screenshot displays the 'Format bar style' dialog box in the 'Format' menu. The 'Format bar style for:' is set to 'Critical Task'. The dialog box shows options for 'Shape' (Solid, Framed, Solid), 'Type' (Solid, Framed, Solid), 'Color' (Red), 'Shadow' (checked), and 'Text' (Font: A, Right: (B) Complete, Top: A, Inside: A, Bottom: A, Left: A). The dialog box has 'Reset to Standard', 'Cancel', and 'OK' buttons. In the background, a Gantt chart is visible with tasks such as 'Renovation', 'Renovation plan', 'Architect', 'Preliminary customize', 'Final Plan', 'Before', 'Renov', 'Wall', 'Con', 'Plis', 'Cra', 'Dai', 'Dor', 'Tol', 'Electri', 'Ren', 'Sanita', 'Lay', 'Acco', 'Fini', 'Establ', 'Insta', 'Cork', 'Order new Furniture', and 'Furniture delivery'. The Gantt chart shows task durations and progress bars.



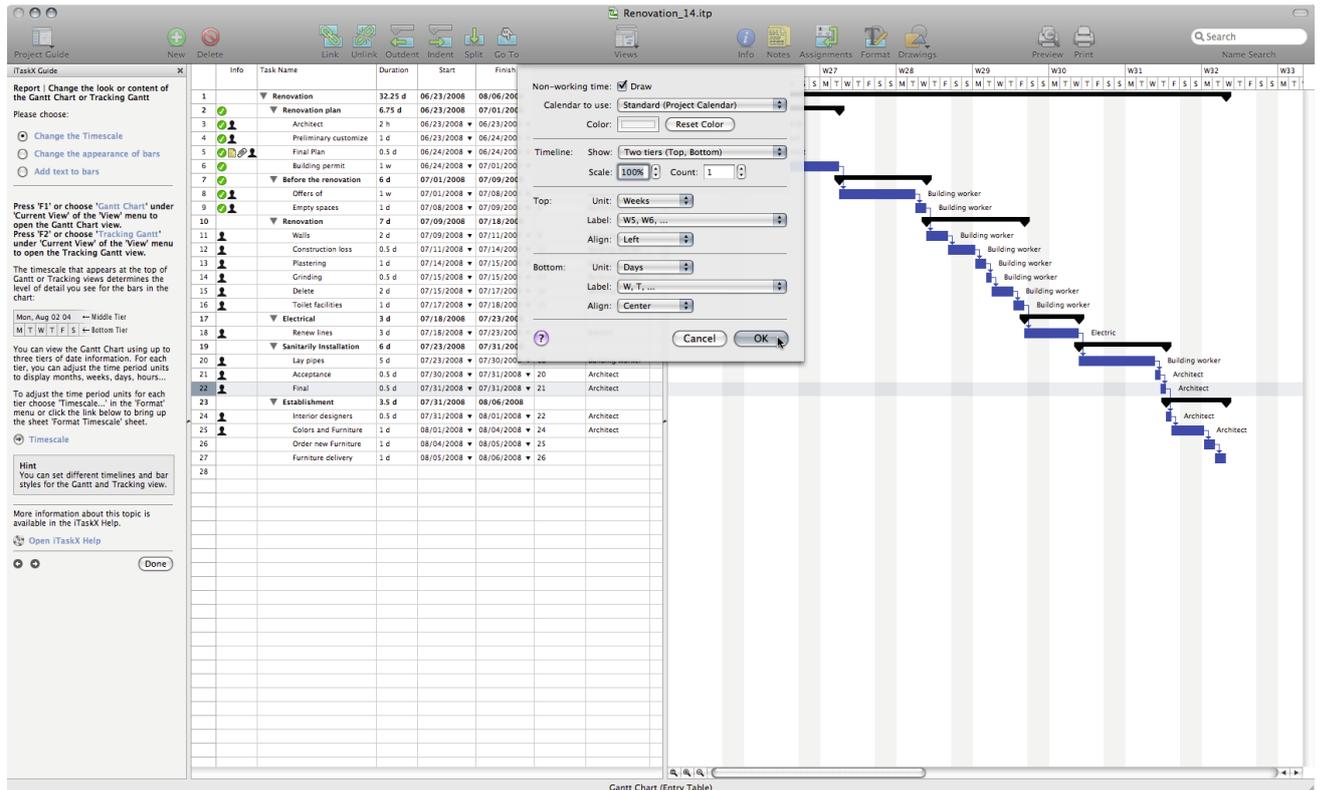
## 1.4 Report

### 1.4.1 Change the look or content of the Gantt Chart or Tracking Gantt

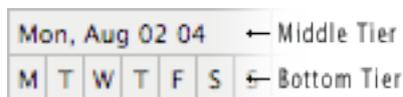
#### Change the Timescale

Press **F1** or choose **Gantt Chart** under **Current View** of the **View** menu to open the Gantt Chart view.

Press **F2** or choose **Tracking Gantt** under **Current View** of the **View** menu to open the Tracking Gantt view.



The timescale that appears at the top of Gantt or Tracking views determines the level of detail you see for the bars in the chart:





You can view the Gantt Chart using up to three tiers of date information. For each tier, you can adjust the time period units to display months, weeks, days, hours... To adjust the time period units for each tier choose ,Timescale...' in the ,Format' menu or click the link below to bring up the sheet ,Format Timescale' sheet.

The screenshot shows the iTasKX interface with a Gantt Chart (Entry Table) and a 'Format bar style for: NormalTask' dialog box. The Gantt Chart displays tasks such as 'Renovation', 'Architect', 'Building worker', and 'Electric' with various bar styles. The dialog box allows customization of bar shape, type, color, shadow, and text.

Task Name	Duration	Start
Renovation	32.25 d	06/23/2008
Renovation plan	6.75 d	06/23/2008
Architect	2 h	06/23/2008
Preliminary customize	1 d	06/23/2008
Final Plan	0.5 d	06/24/2008
Build		
Before		
After		
Renov		
Wall		
Plat		
Grid		
Deck		
Roof		
Electr		
Bar		
Sanitat		
Lay		
Acco		
Fin		
Inst		
Coat		
Order Furniture	1 d	08/04/2008
Furniture delivery	1 d	08/05/2008

### Hint

You can set different timelines and bar styles for the Gantt and Tracking view.

## Change the appearance of bars

Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the Gantt Chart view.

Press ,F2' or choose ,Tracking Gantt' under ,Current View' of the ,View' menu to open the Tracking Gantt view.

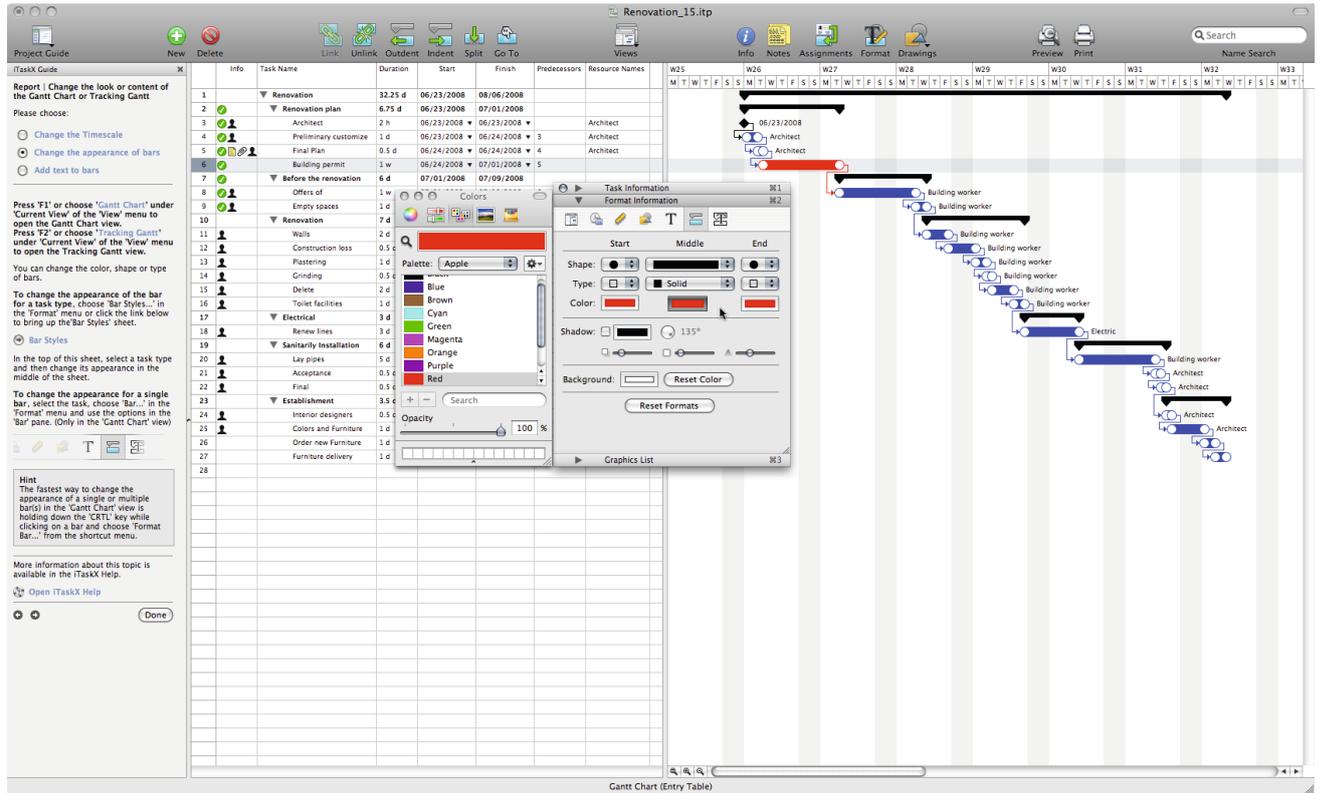
You can change the color, shape or type of bars.

To change the appearance of the bar for a task type, choose ,Bar Styles...' in the ,Format' menu.

In the top of this sheet, select a task type and then change its appearance in the middle of the sheet.



To change the appearance for a single bar, select the task, choose ,Bar...' in the ,Format' menu and use the options in the ,Bar' pane. (Only in the ,Gantt Chart' view)



**Hint**

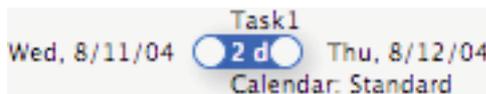
The fastest way to change the appearance of a single or multiple bar(s) in the ,Gantt Chart' view is holding down the ,CTRL' key while clicking on a bar and choose ,Format Bar...' from the shortcut menu.

**Add text to bars**

Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the Gantt Chart view.

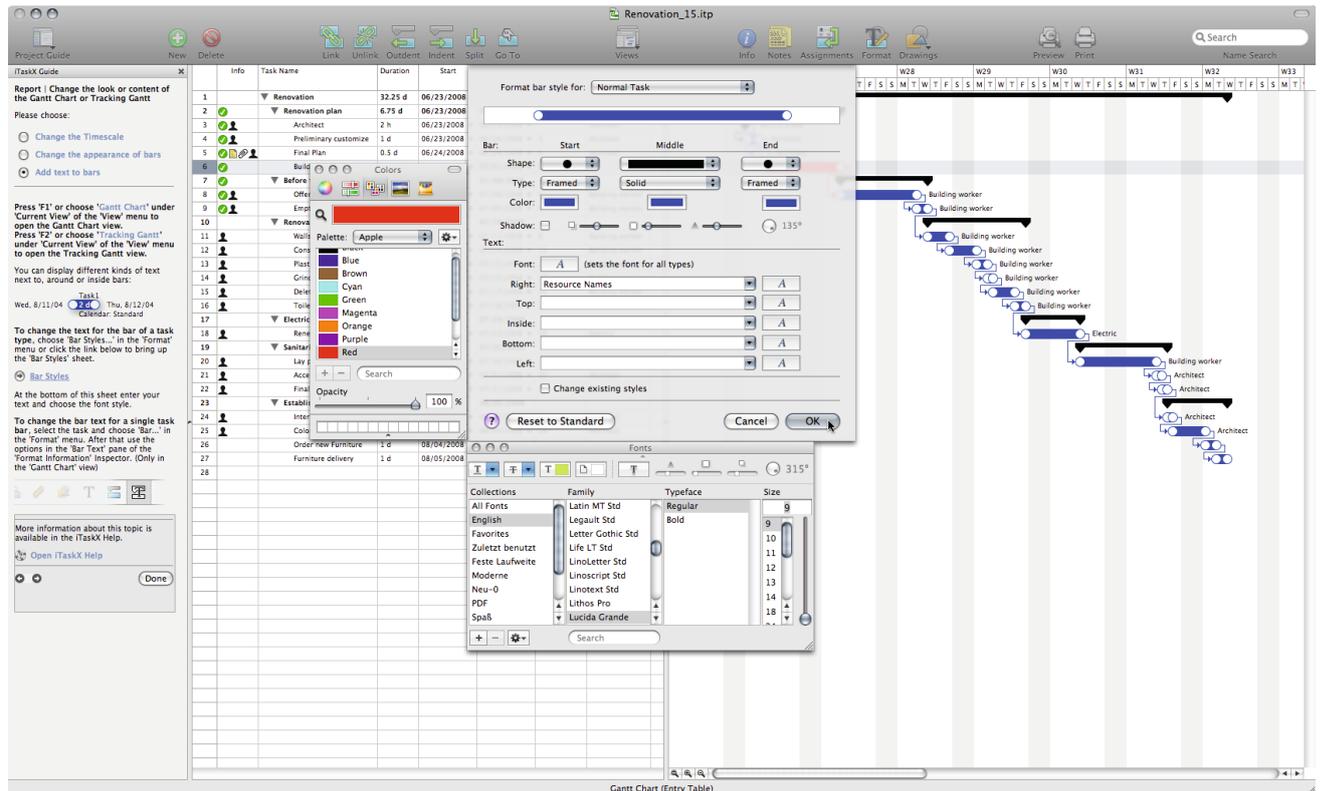
Press ,F2' or choose ,Tracking Gantt' under ,Current View' of the ,View' menu to open the Tracking Gantt view.

You can display different kinds of text next to, around or inside bars:



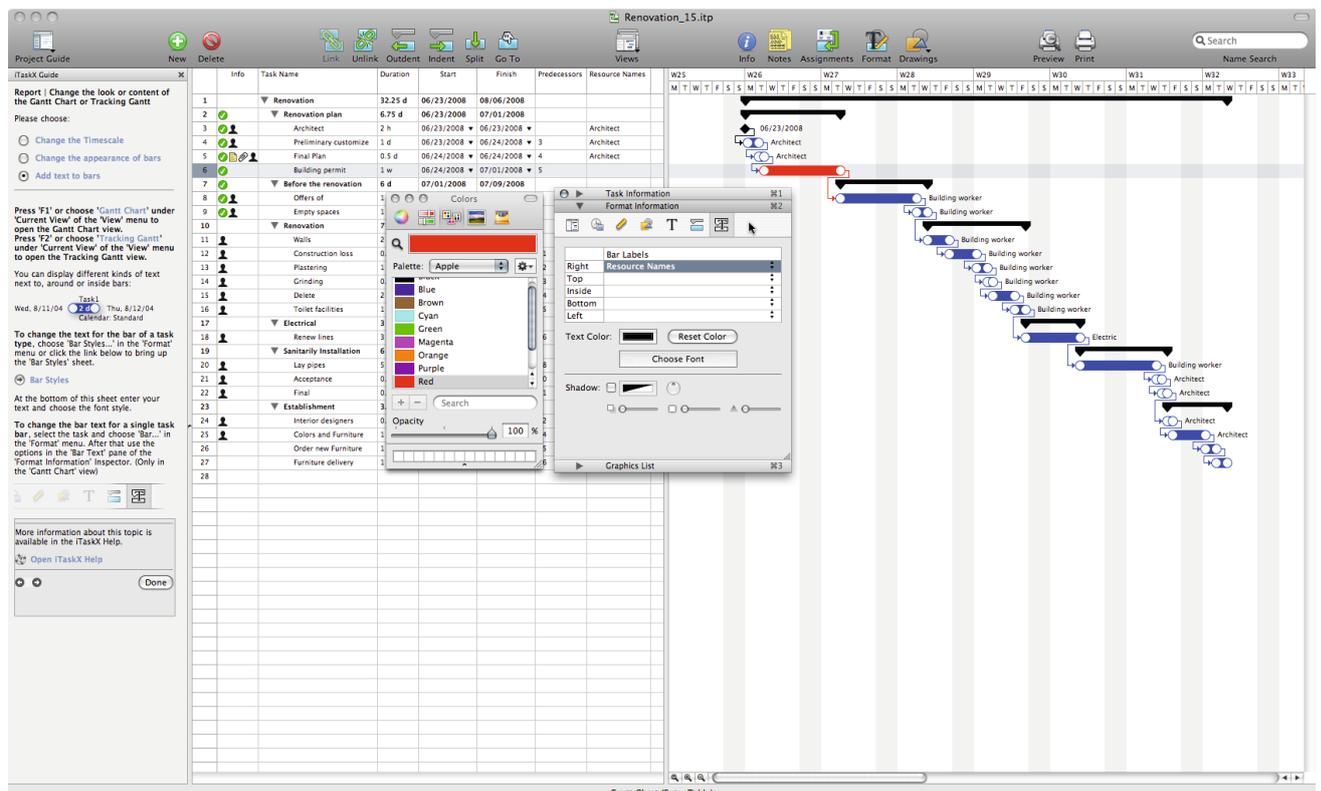


To change the text for the bar of a task type, choose ,Bar Styles...' in the ,Format' menu.



At the bottom of this sheet enter your text and choose the font style.

To change the bar text for a single task bar, select the task and choose ,Bar...' in the ,Format' menu. After that use the options in the ,Bar Text' pane of the ,Format Information' Inspector. (Only in the ,Gantt Chart' view)



## 1.4.2 Change font style and fonts in views

You can set different text styles for the following views.

Gantt Chart  
Tracking Gantt  
Task Sheet  
Task Usage  
Resource Sheet  
Resource Usage

To change text styles of a category, choose 'Text Styles...' in the 'Format' menu.

The screenshot displays the iTaskX software interface. On the left, there is a 'Project Guide' pane with a 'Report | Change font styles and fonts in views' section. The main area shows a Gantt chart with tasks like 'Renovation plan', 'Architect', 'Building permit', etc. A 'Format Text Styles' dialog box is open, showing the 'Font' tab with a list of font families and a preview of the selected font. The 'Typography' tab is also visible, showing options for font size, color, and other typographic settings. The background shows a Gantt chart with various tasks and resources.

You can select fonts, font colors and even adjust the spacing and alignment of some fonts by selecting typography effects such as ligatures, letter case and number style variations, or extra position controls.

1. Select an item in the top of the sheet you want to change.
2. Press the 'Choose Font' button to bring up the 'Font panel' window.
3. Select a font style in the 'Family' column and then select the typeface in the 'Typeface' column. If you do not see all the font families you know are installed on your computer, select 'All Fonts' in the Collections column or type the name of the font you are looking for in the Search field at the bottom of the 'Font panel'. A preview of the selected font appears in the preview pane above the columns. If you do not see a preview pane, choose 'Show Preview' from the Action pop-up menu in the lower-left corner of the 'Font panel'.
4. Adjust the font size using the size slider or pop-up menu.
5. Change the font color by clicking the 'Text Color' button at the top of the 'Font panel'. Select a color in the 'Colors' window.
6. Adjust the typography settings of the selected font by choosing Typography from the Action pop-up menu. In the Typography window, click the disclosure triangles to see and select the different typography effects that are available for the selected font. Different fonts have different typography effects available.



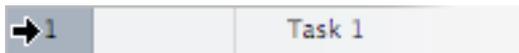
**Hint**

If you need to switch fonts often, you can leave the ,Font panel' open. If it takes up too much space on your screen, you can shrink it by dragging its resize control (the bottom-right corner of the panel), so that only the font families and typefaces in your selected font collection are available in pop-up menus.

**Note**

All changes in that sheet will only effect the current view. If you want to change the font styles for a other view, choose the view you want to change and open the ,Text Styles' sheet again.

To change the font for a single row, leave the sheet and select a row(s) like in the following picture.



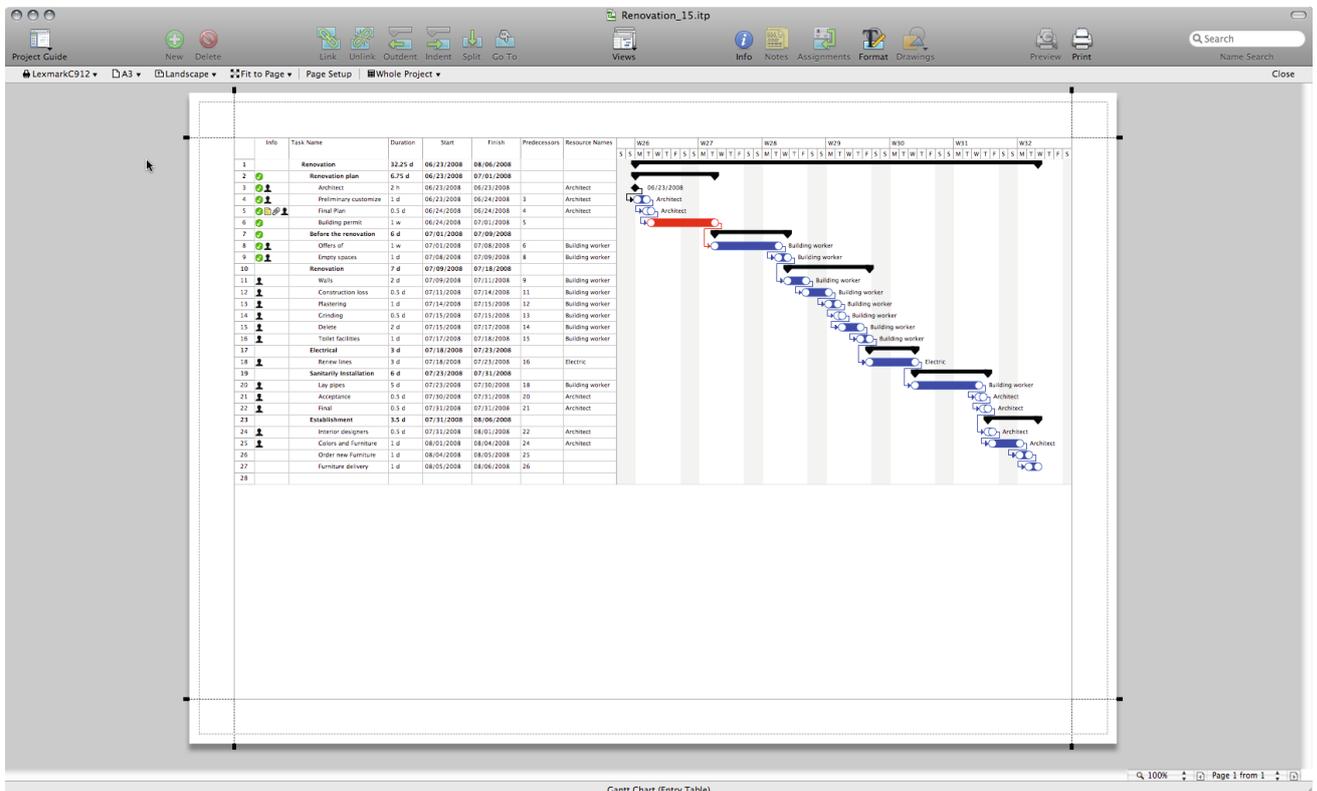
Now open the ,Font panel' (,Show Fonts' from ,Font' of the ,Format' menu or press ,COMMAND'-'T') and start with step 3 above.

**Note** It's only possible the change the font or font styles for the hole row!

**1.4.3 Print current view**

To print a view choose ,Print Preview' in the ,File' menu. If necessary, change options for the type you chose in the pop-up menus under the toolbar. (For example, ,Printer', ,Paper Size', ,Scaling', ,Print Range'...) It's also possible to use the sliders around the preview to set up the page margins. iTaskX will display any changes on the fly and you can see always what your print-out will look like when it's printed.

To add a footer to the current view, choose ,File' > ,Page Setup...' and select the ,Footer' tab. When you're ready to print choose ,Print...' in the ,File' menu, choose the printer you want to use from the ,Printer' pop-up menu and click on the ,Print' button.





**Notes:** The footer will only appear in the ,Print Preview' and on the print-out. It's also possible to set up different print settings for each view.

**Hint**

,Save View as Image...' in the ,File' menu is only available in the ,Print Preview'.

**Relevant Toolbar Items**



**,Preview'**

Displays a print preview of the current view.



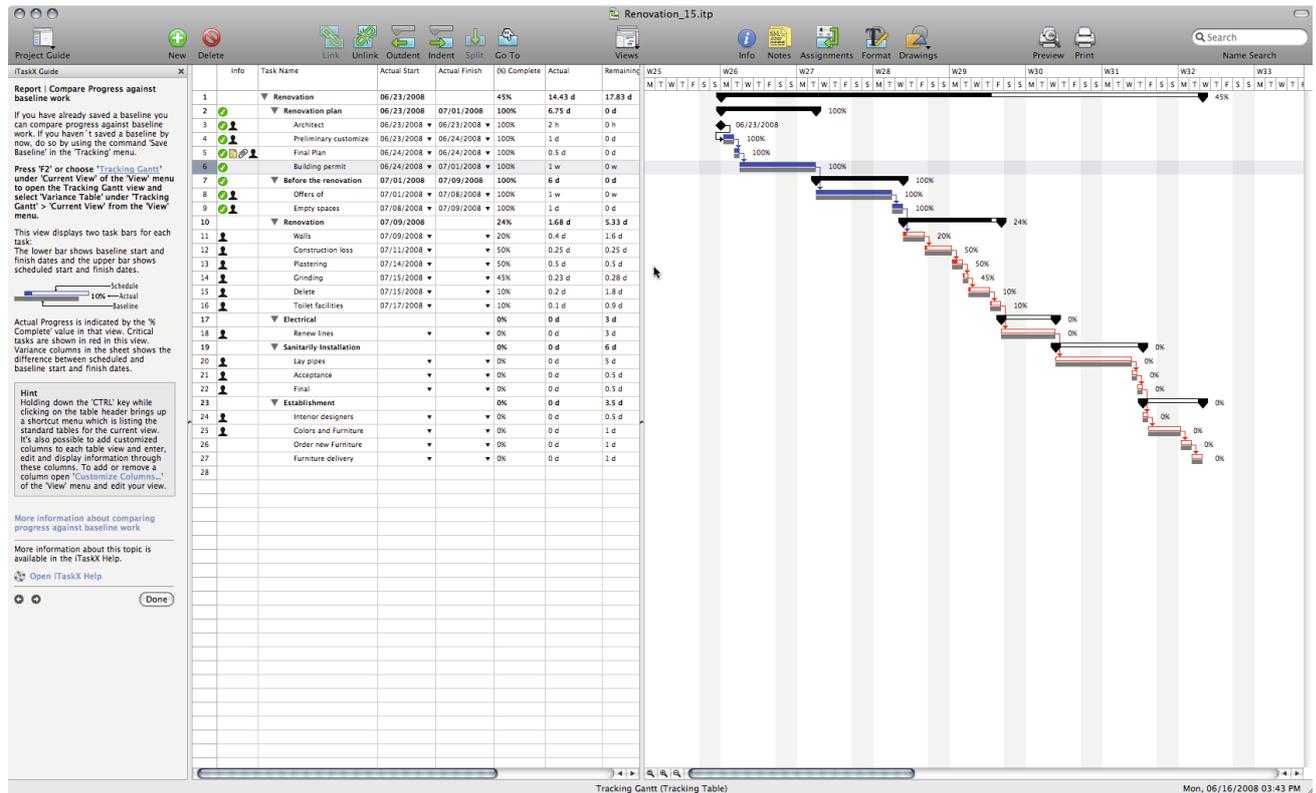
**,Print'**

Prints the current view.

**1.4.4 Compare progress against baseline work**

If you have already saved a baseline you can compare progress against baseline work. If you haven't saved a baseline by now, do so by using the command ,Save Baseline' in the ,Tracking' menu.

Press ,F2' or choose ,Tracking Gantt' under ,Current View' of the ,View' menu to open the Tracking Gantt view and select ,Variance Table' under ,Tracking Gantt' > ,Current View' from the ,View' menu.





This view displays two task bars for each task:

The lower bar shows baseline start and finish dates and the upper bar shows scheduled start and finish dates.



Actual Progress is indicated by the ,% Complete‘ value in that view. Critical tasks are shown in red in this view.

Variance columns in the sheet shows the difference between scheduled and baseline start and finish dates.

**Hint**

Holding down the ,CTRL‘ key while clicking on the table header brings up a shortcut menu which is listing the standard tables for the current view. It’s also possible to add customized columns to each table view and enter, edit and display information through these columns. To add or remove a column open ,Customize Columns...‘ of the ,View‘ menu and edit your view.

**Compare actual, scheduled and baseline work**

The baseline bars in this chart shows the planned start and finish dates for your tasks. The scheduled bars shows the dates tasks are currently scheduled to start and finish, based on the progress made on tasks and any changes you have made to the schedule.

As a project progresses, there is usually some difference between the task dates you originally planned and the actual dates. You can view this difference in the Variance columns of the sheet.



### 1.4.5 See how resources time is allocated

Press ,F8' or choose ,Resource Usage' under ,Current View' of the ,View' menu to open the Resource Usage view.

A resource is overallocated when it is assigned too much work to complete within the resource available time. You can resolve resource overallocations by adjusting either tasks or resources in your project.

	Info	Name	Work	Overtime Work	Assignment Units	Start	Finish	Overallocated
1		Architect	34 h			06/23/2008	08/04/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Architect	2 h	0 h	100%	06/23/2008	06/23/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Preliminary customize	8 h	0 h	100%	06/23/2008	06/24/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Final Plan	4 h	0 h	100%	06/24/2008	06/24/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Acceptance	4 h	0 h	100%	07/30/2008	07/31/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Final	4 h	0 h	100%	07/31/2008	07/31/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Interior designers	4 h	0 h	100%	07/31/2008	08/01/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Colors and Furniture	8 h	0 h	100%	08/01/2008	08/04/2008	<input type="checkbox"/>
2		Electric	24 h			07/18/2008	07/23/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Renew lines	24 h	0 h	100%	07/18/2008	07/23/2008	<input type="checkbox"/>
3	<input checked="" type="checkbox"/>	Painter	0 h					<input type="checkbox"/>
4	<input checked="" type="checkbox"/>	Building worker	144 h			07/01/2008	07/30/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Offers of	40 h	0 h	100%	07/08/2008	07/08/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Empty spaces	8 h	0 h	200%	07/08/2008	07/09/2008	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	Walls	16 h	0 h	100%	07/09/2008	07/11/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Construction loss	4 h	0 h	100%	07/11/2008	07/14/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Plastering	8 h	0 h	100%	07/14/2008	07/15/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Grinding	4 h	0 h	100%	07/15/2008	07/15/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Delite	16 h	0 h	100%	07/15/2008	07/17/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Toilet facilities	8 h	0 h	100%	07/17/2008	07/18/2008	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Lay pipes	40 h	0 h	100%	07/23/2008	07/30/2008	<input type="checkbox"/>
5		Steel	0 Met					<input type="checkbox"/>
6		Wood	0 Met					<input type="checkbox"/>

**Note** In resource sheets, overallocated resources are marked by a check box icon in the ,Overallocated' column.

- **A resource assigned to work full-time on more than one task at the same time.**  
**For example,** if you assign a resource to two tasks of eight hours each on the same day, then the resource is overallocated because only one eight-hour task can be accomplished on that day. To view a resource workload, press ,F8' or select ,Resource Usage' under ,Current View' of the ,View' menu. Look at the number of tasks assigned.
- **Increased duration of tasks.**  
If you increase a tasks duration, then the amount of work assigned to the resource also increases and may cause the resource to have too much work at one time. To view a resource workload, press ,F8' or select ,Resource Usage' under ,Current View' of the ,View' menu. Look at the number of hours of work assigned.
- **Decreased unit availability for resources.**  
**For example,** a resource availability is reduced from 100% units to 50% units because it is working part-time. Or, more specific non-working time is entered on the resource calendar, such as Monday through Friday, 8:00 A.M. to 12:00 A.M. To see if non-working time is entered on the resource calendar, select ,Working Times...' in the ,Edit' menu and choose the calendar which is used for the resource.
- **The project not accounting for the extra time a resource spends on a task.**  
You can account for overallocations, rather than resolve them, by adding overtime. Overtime is the amount of work on an assignment that is scheduled beyond the regular working hours of an assigned resource and charged at the overtime rate. Overtime work indicates the amount of the assignment's work that is specified as overtime work.



### 1.4.6 See project costs

Press ,F5' or choose ,Task Sheet , under ,Current View' of the ,View' menu to open the Task Sheet view and select ,Cost Table' under under ,Task Sheet' > ,Current View' from the ,View' menu.

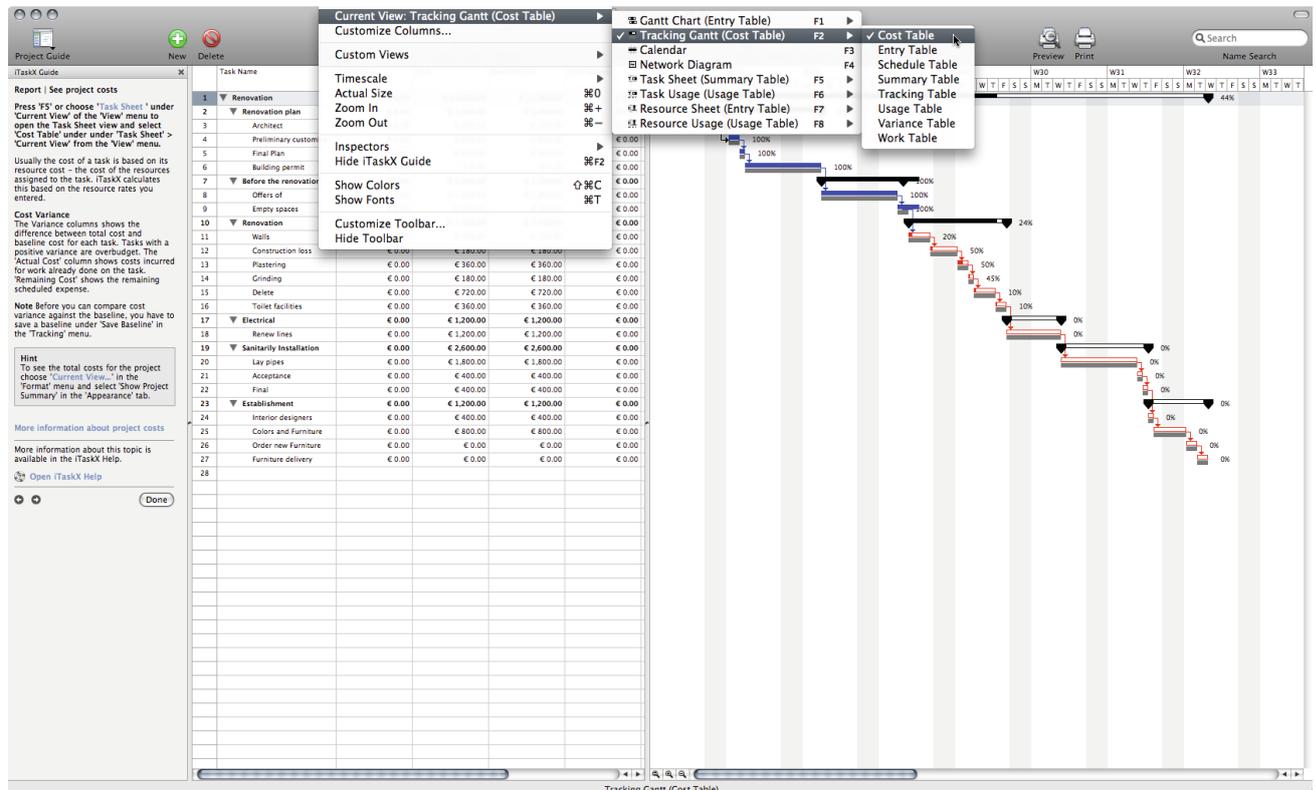
The screenshot displays the iTaskX software interface. The main window shows a 'Task Sheet (Summary Table)' with columns for Task Name, Duration, Start, Finish, % Complete, Cost, and Work. The table lists various tasks such as 'Renovation plan', 'Architect', 'Preliminary customize', 'Final Plan', 'Building permit', 'Before the renovation', 'Offers of', 'Empty spaces', 'Renovation', 'Walls', 'Construction loss', 'Plastering', 'Grinding', 'Delete', 'Toilet facilities', 'Electrical', 'Renew lines', 'Sanitary installation', 'Lay pipes', 'Acceptance', 'Final', 'Establishment', 'Interior designers', 'Colors and Furniture', 'Order new Furniture', and 'Furniture delivery'. A 'Project Information' dialog box is open on the right, showing details for 'Renovierung', including Start Date (06/23/2008 08:00 AM), Finish Date (08/06/2008 10:00 AM), Current Date (09/10/2008), Budget (€ 0.00), Title, Subject, Author, Manager, and Company. The dialog also shows creation and last saved dates, and a revision number of 26.

Task Name	Duration	Start	Finish	% Complete	Cost	Work
Renovation	32.25 d	06/23/2008	08/06/2008	44%	€ 11,080.00	202 h
Renovation plan	6.75 d	06/23/2008	07/01/2008	100%	€ 1,400.00	14 h
Architect	2 h	06/23/2008	06/23/2008	100%	€ 200.00	2 h
Preliminary customize	1 d	06/23/2008	06/24/2008	100%	€ 800.00	8 h
Final Plan	0.5 d	06/24/2008	06/24/2008	100%	€ 400.00	4 h
Building permit	1 w	06/24/2008	07/01/2008	100%	€ 0.00	0 h
Before the renovation	5.5 d	07/01/2008	07/09/2008	100%	€ 2,160.00	48 h
Offers of	1 w	07/01/2008	07/08/2008	100%	€ 1,800.00	40 h
Empty spaces	0.5 d	07/08/2008	07/09/2008	100%	€ 360.00	8 h
Renovation	7 d	07/09/2008	07/16/2008	24%	€ 2,520.00	56 h
Walls	2 d	07/09/2008	07/11/2008	20%	€ 720.00	16 h
Construction loss	0.5 d	07/11/2008	07/14/2008	50%	€ 180.00	4 h
Plastering	1 d	07/14/2008	07/15/2008	50%	€ 360.00	8 h
Grinding	0.5 d	07/15/2008	07/15/2008	45%	€ 180.00	4 h
Delete	2 d	07/15/2008	07/17/2008	10%	€ 720.00	16 h
Toilet facilities	1 d	07/17/2008	07/18/2008	10%	€ 360.00	8 h
Electrical	3 d	07/18/2008	07/23/2008	0%	€ 1,200.00	24 h
Renew lines	3 d	07/18/2008	07/23/2008	0%	€ 1,200.00	24 h
Sanitary installation	6 d	07/23/2008	07/31/2008	0%	€ 2,600.00	48 h
Lay pipes	5 d	07/23/2008	07/30/2008	0%	€ 1,800.00	40 h
Acceptance	0.5 d	07/30/2008	07/31/2008	0%	€ 400.00	4 h
Final	0.5 d	07/31/2008	07/31/2008	0%	€ 400.00	4 h
Establishment	3.5 d	07/31/2008	08/06/2008	0%	€ 1,200.00	12 h
Interior designers	0.5 d	07/31/2008	08/01/2008	0%	€ 400.00	4 h
Colors and Furniture	1 d	08/01/2008	08/04/2008	0%	€ 800.00	8 h
Order new Furniture	1 d	08/04/2008	08/05/2008	0%	€ 0.00	0 h
Furniture delivery	1 d	08/05/2008	08/06/2008	0%	€ 0.00	0 h

Usually the cost of a task is based on its resource cost – the cost of the resources assigned to the task. iTaskX calculates this based on the resource rates you entered.

## Cost Variance

The Variance columns shows the difference between total cost and baseline cost for each task. Tasks with a positive variance are overbudget. The ,Actual Cost' column shows costs incurred for work already done on the task. ,Remaining Cost' shows the remaining scheduled expense.



**Note** Before you can compare cost variance against the baseline, you have to save a baseline under ,Save Baseline' in the ,Tracking' menu.

### Hint

To see the total costs for the project choose ,Current View...' in the ,Format' menu and select ,Show Project Summary' in the ,Appearance' tab.

## Analyze project costs

If your project is going over budget, you can adjust costs in different ways:

- Change resource assignments to reduce costs. **For example**, you might replace an expensive resource by a cheaper one.
- Adjust the resource pay rates or the task costs. **For example**, you may be able to negotiate a lower rate for a resource. Or, if you have fixed costs assigned to tasks, you may be able to reduce them.
- Reduce project scope. You may decide to deliver less to reduce costs. In this case, you may need to delete tasks or shorten their durations to reflect the smaller deliverables. Doing so will also reduce costs.



## 2.0 iTaskX Help Topics

### 2.1 Startup & Customizing

#### 2.1.1 System Requirements

- Macintosh computer with an Intel processor
- Min. 2 GB of physical RAM  
(4 GB or more of physical RAM recommended)
- Mac OS X 10.5.8 or later  
(Mac OS X 10.7.0 or later recommended)  
Leopard, Snow Leopard, Lion and Mountain Lion compatible!
- Display with at least 1024-by-768-pixel resolution
- About 100 MB of disk space required to install iTaskX

#### 2.1.2 License Agreement (Download version from [www.itaskx.com](http://www.itaskx.com))

END USER LICENSE AGREEMENT  
Concluded between

Techno-Grafik Christian Lackner eU  
A-4221 Steyregg|Linz, Weissenwolffstraße 14  
FN 310084g Court of A-4020 Linz  
ATU 24385902

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And  
The User

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### 2.1.3 Using the iTaskX Guide

iTaskX provides a guide with easy-to-follow instructions to help you to enter tasks, define and assign resources, track progress and report on the status of your project.

- In the iTaskX toolbar click on the ,Project Guide' toolbar icon and choose under ,Tasks', ,Resources', ,Track' or ,Report' the desired topic. After that use the instructions in the side pane as needed.

#### Relevant Toolbar Item



#### ,Project Guide'

Let you select entries from the iTaskX Guide.

### 2.1.4 Using the iTaskX Inspectors

To display an inspector in iTaskX that is not currently on the screen, select its command from the ,View' > ,Inspectors' menu. To expand or collapse an inspector, click its title bar. To close an inspector, click the close button in its title bar. In the ,View' > ,Inspectors' menu there are some extra handy commands and keyboard shortcuts for managing inspectors.

Inspectors can be dragged around by their title bars like normal windows, but they will snap into place when you drag them above or below other inspectors.

When you have inspectors attached to each other vertically, you can use the top inspector's title bar to drag all of them around together. The top inspector's close button will also close any attached inspectors. Dragging any inspector other than the top one will detach it from the inspectors above it.

Inspectors with a row of icons across the top (like the ,Item Information' inspector) have several sections; click an icon to switch to that section.

You can also click on the ,Info', ,Notes', ,Assignments' or ,Format' toolbar icon to jump directly in the desired section of a inspector.

#### Relevant Toolbar Item



#### ,Info'

Show/Hide the item information inspector.



#### ,Notes'

Displays notes for the selected item.



#### ,Assign Resources'

Displays resource-assignments for the selected task.



#### ,Format'

Show/Hide the format options inspector.

### 2.1.5 Defaults and Templates

iTaskX templates are useful for standardizing the use and appearance of iTaskX files. Information in a template can include tasks, resources, custom tables, custom calendars, appearance settings for gantt charts, text styles, views and settings from ,Edit' > ,Project Options...'. Most defaults from iTaskX are based on templates.



### Create a new default template

1. Select ,File' > ,New' to create a new document.
2. Adjust each view you want to change by customizing tables (,View' > ,Customize Columns...'), bar styles (,Format' > ,Bar Styles...'), text styles (,Format' > ,Text Styles...'), other settings for the current view (,Format' > ,Current View...'), timescale (,Format' > ,Timescale...'), calendars (,Edit' > ,Working Times...') and other settings from ,Edit' > ,Project Options...'.

#### Note

Not all options are available for each view. It's also possible to store resources and tasks in that template.

3. Select ,File' > ,Save As...' to bring up the ,Save As' sheet.
4. In the ,Save As' field type a name you want.
5. Choose a folder where you store your templates. It's recommended to use a own folder for templates.
6. In the ,File Format' pop-up select ,iTaskX-Template'.
7. Click on the ,Save' button to save your template.
8. Select ,iTaskX' > ,Preferences...' to open the ,Preferences...' dialog.
9. Under ,Standardtemplate' – ,Search Paths for User templates' click on the ,Plus' button and choose the folder where you store your templates.
10. In the ,Standardtemplate' pop-up select your new template.  
Now each new document is based on the new template.

#### Notes

- You can also save any iTaskX document as template and open it under ,File' > ,New from Template...'.
- Do not save projects with a active schedule (,% Complete' greater then ,0%') as template.



## 2.2 Create a Project

### 2.2.1 About Scheduling

iTTaskX schedules a project from the information you enter about the following:

- The overall project.
- The individual tasks required to complete the project.
- If necessary, the resources needed to complete those tasks.

If anything about your project changes after you create your schedule, you can update the tasks or resources and iTTaskX adjusts the schedule for you.

**For each task, you might enter one or all of the following:**

- Durations
- Task dependencies
- Constraints

Using this information, iTTaskX calculates the start date and finish date for each task.

You can enter resources in your project and then assign them to tasks to indicate which resource is responsible for completing each assignment. This doesn't only help you planning project staffing, it can also help you calculate the number of machines needed or the quantity of material to be consumed.

**If you enter resources, task schedules are further refined according to the following resource information:**

- Work
- Units
- Working times entered in calendars

Other elements, such as lead time and lag time, task types, resource availability and the driving resource can affect scheduling, so understanding the effects of these elements can help you maintain and adjust your schedule as needed.

### 2.2.2 Specify a Project Start

iTTaskX use the current date as project start date by default. You can change the project start date any time in the 'Item Information' inspector, even after you have built your project plan.

**For example**, you can make your start date earlier if you're trying to meet a specific finish date and your schedule extends beyond that date.

### 2.2.3 About Tasks

**To define your tasks most effectively, take into account the following guidelines:**

- Break down tasks to the level of detail that you want to track. You should break them down in greater detail for riskier areas.
- Make sure that tasks have clear completion criteria.
- Define tasks that are short compared with the overall project duration. Shorter tasks allow you to more easily estimate time and resources.
- Avoid defining such things as vacation or training as tasks.



A work breakdown structure (WBS) can help you create a task list by taking a high-level description of the work and breaking it into components

**For example,** the high-level work description, 'Remodel kitchen' includes such lower level work as installing cabinets, installing a sink and installing a countertop. 'Remodel kitchen' is considered a phase or summary task. The lowest level of the WBS, the installation components, are tasks or subtasks. In some organizations, tasks may also be called work packages.

iTaskX also calculates automatically outline numbers for each task based on the outline structure of the task list. Outline numbers consist of numbers only, and you cannot edit them. They do, however, change automatically when you move a task up or down in the task list or indent or outdent tasks.

**Insert the 'WBS-Code' column (WBS-Codes are only available for task tables):**

1. Choose 'View' > 'Customize Columns...' to open the 'Customize Columns' sheet.
2. In the 'Columns Name' list, click the check box beside 'WBS-Code'.
3. Click the 'OK' button.
4. The 'WBS-Code' column will be inserted as the last column. You can rearrange columns by clicking on the column header and dragging.

## 2.2.4 Entering Tasks

1. Press 'F1' or choose 'Gantt Chart' under 'Current View' of the 'View' menu to open the 'Gantt Chart' view.
2. In the 'Task Name' field, type a task name and in the 'Duration' field, enter the time required to complete the task, as a number followed by 'm' for minutes, 'h' for hours, 'd' for days, 'w' for weeks or 'mo' for months. Do not enter 'Start' or 'Finish' dates yet. It's important to note that you can schedule your tasks most effectively by entering only 'Task Name' and 'Duration' for each task and letting iTTaskX, after linking, calculate the start and finish dates for you.
3. You can insert a task between existing tasks by selecting the row above where you want a new task to appear. On the 'Insert menu', select 'New Item' or click on the 'New' icon in the toolbar and enter the task name and duration in the inserted row.
4. Press 'RETURN' to leave the edit mode or press 'RETURN' again to insert a new row.

### Hints

- If you have selected a row in a table view press 'SHIFT' - 'RETURN' to activate the edit mode. Jump to the next field with 'TAB' and back with 'SHIFT' - 'TAB'.
- Press 'OPTION' - 'RETURN' to set a linebreak in tablefields (edit mode).

### Notes

- You can change task scheduling defaults to indicate how much time you want to constitute a day, a week and a month when entering and reviewing durations in a task view. It can also help you synchronize task scheduling with what you've established in the working time calendars for resource availability. To change task scheduling defaults open 'Edit' > 'Project Options...' and choose the 'Calendar' tab.
- With iTTaskX, you can use an outline to organize your schedule as you enter tasks or you can wait until you enter all of your project tasks. When you outline a schedule for your project, you simplify its organization so that your project is easier to create, manage and maintain.
- The task IDs are automatically renumbered after you insert a task.
- If you want to apply a calendar to your task, select a task(s) and click on the 'Info' icon in the toolbar, select under the 'Task information' pane in the 'Info' panel the calendar you want to use.
- Each new task starts on the project start date by default. You can change this behaviour under 'Edit' > 'Project Options...' > 'Schedule'.



### Relevant Toolbar Items



**,New'**  
To insert a new row.



**,Info'**  
To open the Info panel.

### 2.2.5 Working with Task Durations

#### Enter a duration

You can enter an accurate duration for a task or a new estimated duration to replace the estimated duration that iTTaskX assigns to each task by default. It's important to note that you can schedule your tasks **most effectively by entering a duration and links for each task and letting iTTaskX calculate the start and finish dates** for you.

1. Press **,F1'** or choose **,Gantt Chart'** under **,Current View'** of the **,View'** menu to open the **,Gantt Chart'** view.
2. In the **,Duration'** column, enter the time required to complete each task, as a number followed by **,m'** for minutes, **,h'** for hours, **,d'** for days, **,w'** for weeks or **,mo'** for months.
3. If the new duration is an estimate, type a question mark **,?'** after it.
4. Press **,RETURN'** to leave the edit mode.

#### Notes

- When you enter a task, iTTaskX automatically assigns it an estimated duration of one day; a question mark after the duration indicates that it is estimated. When you enter a different value for the duration, the question mark disappears.
- To turn off the estimated duration indicators for tasks yet to be created, on the **,Edit'** menu, select **,Project Options...'** and then click the **,Schedule'** tab. Clear the **,New tasks have estimated durations'** check box.

#### Change a duration

Changing the task duration is one method you can use to help meet your finish date, resolve resource overallocations, cut costs, increase scope, or increase quality. When you change a task's duration to meet a specific target, be sure that the change still reflects realistic time requirements for the task.

To change a duration follow step 1–4 above.

#### Note

When you change duration, be sure to also check and adjust the corresponding amount of work assigned, as necessary.

### 2.2.6 Create a Milestone

1. Press **,F1'** or choose **,Gantt Chart'** under **,Current View'** of the **,View'** menu to open the **,Gantt Chart'** view.
2. Type **,0'** in the **,Duration'** field of the task you want to change. When you enter a duration of zero for a Task, iTTaskX displays the milestone symbol on the Gantt Chart on that day.
3. Press **,RETURN'** to leave the edit mode.

#### Note

Some milestones may need a duration. **For example**, your project has an approval milestone at the end of a phase and you know that the approval process will take a week. To mark a task as a



milestone with a duration of more than ,0' days, select the task, click ,Info' toolbar icon and enter under the ,Task information' pane in the ,Info' panel the task duration in the ,Duration' field and select the ,Mark task as milestone' check box.

### Relevant Toolbar Item



**,Info'**

To open the Info panel.

## 2.2.7 Attach Supporting Information

### Add notes to tasks, resources and assignments

You can add supporting information by typing in a note.

1. MSelect a task, resource or a assignment.
2. Click on the ,Notes' toolbar icon to bring up the ,Notes' pane in the ,Info' panel.
3. Type your note.

### Note

Tasks with attached notes have a note icon  in the ,Task Info' column.

### Relevant Toolbar Item



**,Notizen'**

Zum Erstellen und Bearbeiten von Notizen.

### Add a document to a task

You can add one document to each task in your project.

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Select a task.
3. Point to ,Edit' > ,Tasks' > ,Task Attachment' > ,Assign...'.
4. Choose the document you want to assign.

### Note

By default iTTaskX links the document to the task. If you like to embed the document in your iTTaskX file, mark the ,Embed Filedata' check box.

5. Click on the ,Open' button to assign the document.

### Notes

- Tasks with attached documents have a attachment icon  in the ,Task Info' column.
- Tasks with attached documents, which have a broken link have a broken attachment icon  in the ,Task Info' column.
- To remove a assigned document from a task, select the task and choose ,Edit' > ,Tasks' > ,Task Attachment' > ,Remove'.
- To open a assigned document, select the task and choose ,Edit' > ,Tasks' > ,Task Attachment' > ,Open'.
- To save a embedded assigned document, select the task and choose ,Edit' > ,Tasks' > ,Task Attachment' > ,Save as...'.



### 2.2.8 About Task Constraints

Constraints impose restrictions on the way iTaskX calculates the start and finish dates of tasks. By default, iTaskX applies flexible constraints, such as ,As Soon As Possible', to tasks. For optimal scheduling flexibility, it's recommended that you allow iTaskX to use flexible constraints to calculate the start and finish dates for tasks based on the durations and task dependencies you enter. Only if you have unavoidable constraints, such as an event date that cannot be moved, should you consider setting a constraint for a task manually.

#### Available constraints

- **As Soon As Possible**  
This flexible constraint schedules the task to begin as early as possible. This is the the iTaskX default constraint. Do not enter a date with this constraint.
- **As Late As Possible**  
This flexible constraint schedules the task as late as possible with the task ending before the project finish and without delaying subsequent tasks. Do not enter a date with this constraint.
- **Must Start On**  
This inflexible constraint schedules the task to start on a specified date. Sets the early, scheduled and late start dates to the date you type and anchors the task in the schedule.
- **Must Finish On**  
This inflexible constraint schedules the task to finish on a specified date. Sets the early, scheduled and late finish dates to the date you type and anchors the task in the schedule.
- **Start No Earlier Than**  
Schedules the task to start on or after a specified date. Use this constraint to ensure that a task does not start before a specified date.
- **Start No Later Than**  
Schedules the task to start on or before a specified date. Use this constraint to ensure that a task does not start after a specified date.
- **Finish No Earlier Than**  
Schedules the task to finish on or after a specified date. Use this constraint to ensure that a task does not finish before a certain date.
- **Finish No Later Than**  
Schedules the task to finish on or before a specified date. Use this constraint to ensure that a task does not finish after a certain date.

### 2.2.9 Setting or Changing Task Constraints

#### Set a specific start or finish date for a task

For optimal scheduling flexibility, it's recommended that you allow iTaskX to calculate the start and finish dates for tasks based on the durations and task dependencies you enter. However, if you have unavoidable constraints, such as an event date, you can set a specific start or finish date for a task.

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Select the task you want to change and then click the ,Info' toolbar icon.
3. In the ,Constraint' pop-up under the ,Task information' pane in the ,Info' panel, select a constraint type.
4. If you selected a constraint other than ,As Late As Possible' or ,As Soon As Possible', choose or type a constraint date in the ,Date' field.

#### Note

When you type a date in the ,Start' field of a task, **or drag a Gantt bar to change the start date, iTaskX sets a ,Start No Earlier Than' constraint** for that task.

Tasks with constraints are also clearly marked in the ,Task Info' column with a small icon . Rest the pointer on the constraint indicator to see the constraint type and date.



### Relevant Toolbar Item



**,Info'**

To open the Info panel.

### Change a Task constraint

To calculate the schedule with fewer restrictions, you may want to use flexible constraints rather than inflexible constraints on critical tasks. You can add the ,Constraint Date' column to all views which contains tables.

1. Press ,F5' or choose ,Task Sheet' under ,Current View' of the ,View' menu to open the ,Task Sheet' view.
2. Point to ,View' > ,Customize Columns...'
3. In the Column list, select ,Constraint Date' and ,Constraint Type' check box and click the ,OK' button.
4. To change a constraint type, click the down arrow in the ,Constraint Type' field and then click the constraint type you want. To change the date of a constraint, in the ,Constraint Date' field, type or select the date you want.

### Note

You can also view and change a tasks constraint under the ,Task information' pane in the ,Info' panel. Select the task with the constraint, click on the ,Info' icon in the toolbar and review or change the constraint type and constraint date.

### 2.2.10 About Outlining Tasks

After you entered all taskst, organize and add structure to your project by applying outlining, which you can use to hide or show tasks, or show the relationship between tasks. Create your outline by indenting tasks that share characteristics or that will be completed in the same time frame under a summary task. You can use summary tasks to show the major phases and subphases in the project. Summary tasks summarise the data of their subtasks, which are the tasks grouped beneath them. You can indent tasks as many levels as you need to reflect the organization of your project.

	Task Info	Task Name	Duration	W34
				S M D M D F S
1		▼ Group 1	5 d	
2		Task 1	5 d	
3		Task 2	3 d	
4		Task 3	5 d	

1) This summary task information summaries the period between the earliest start and latest finish date of all the included subtasks. It does not show the sum of all the subtask durations.



### 2.2.11 Outlining Tasks

#### Create an outline structure

Outlining helps you organize your tasks into summary tasks and subtasks.

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Select the task(s) you want to indent (move to a lower level in the hierarchy) or outdent (move to a higher level in the hierarchy).
3. Click on the ,Indent' toolbar icon to indent the task(s).  
Click on the ,Outdent' toolbar icon to outdent the task(s).

#### Note

Placing tasks in a hierarchical order does not automatically create task dependencies. To create task dependencies, the tasks must be linked.

#### Relevant Toolbar Items

 ,Indent'  
 To indent the task(s).

 ,Outdent'  
 To outdent the task(s).

#### Show and hide subtasks

In an outline, you can show or hide the subtasks of a summary task. **For example**, you may want to hide your subtasks to display only top-level tasks and then print that view to create a summary report.

To show or hide subtasks click on the outline symbol like in the following picture.

	Task Info	Task Name
1		Group 1
2		Group 2
3		Task 1
4		Task 2
5		Task 3

Subtasks hide (points to Group 1)

Subtasks show (points to Group 2)

#### Note

When you move or delete a summary task, you automatically move or delete all the subtasks associated with it.



## 2.2.12 Linking Tasks

### Link related tasks

After tasks are created in a project, they should be linked to show relationships between them.

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Select two or more tasks you want to link.
  - To select nonadjacent tasks, hold down ,COMMAND' key, and then click the tasks you want to link.
  - To select adjacent tasks, hold down ,SHIFT' key, and then click the first and last tasks you want to link.
3. Click on the ,Link' toolbar icon to link the tasks.  
By using the ,Link' toolbar icon iTaskX creates a ,Finish-to-Start' link by default. You can change task links later to ,Start-to-Start', ,Finish-to-Finish', or ,Start-to-Finish'.

### Note

It's also possible to create ,Finish-to-Start', ,Start-to-Start', ,Finish-to-Finish', or ,Start-to-Finish' links with the mouse in the Gantt Chart. To create a link between two tasks with the mouse in the ,Gantt Chart', click on the desired taskbar and drag the mouse up or down until the cursor change into a chain, then release the mouse button on the other taskbar.

### Relevant Toolbar Item



,Link'

Creates links between selected tasks.

### Change a task link

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Double-click the link line of the tasks you want to change.



3. In the ,Type' pop-up under the ,Links' pane in the ,Info' panel select the link type you want.

### Notes

- A simple ,Finish-to-Start' task link does not work in each situation. iTaskX provides additional types of task links so you can model your project realistically. **For example**, when two tasks need to start at the same time, you can create a ,Start-to-Start' link. When tasks need to finish at the same time, you can use a ,Finish-to-Finish' link.
- It's also possible to change the task link under the ,Links' pane in the ,Info' panel. To change the link, select the successor task of the link you want to change, click on the ,Info' button in the toolbar, then make your changes under the ,Links' pane.

### Remove a task link

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Select the tasks you want to unlink.
3. Click on the ,Unlink' toolbar icon to unlink the tasks.  
The tasks are rescheduled based on any links to other tasks or constraints.



### Relevant Toolbar Item



**,Unlink'**  
Unlinks selected tasks.

#### 2.2.13 Lead and Lag Time

##### About lead and lag time

Lead time is overlapped between tasks that have a dependency. **For example**, if a task can start two days before its predecessor is finished, you can specify a finish-to-start dependency with a lead time of 2 days for the successor task. You enter lead time as a negative value ,-2d'.

Lag time is a delay between tasks that have a dependency. **For example**, if you need a two-day delay between the finish of one task and the start of another, you can establish a finish-to-start dependency and specify two days of lag time. You enter lag time as a positive value ,2d'.

##### Set lead or lag time

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Select the task you want to set lead or lag time and then click the ,Info' toolbar icon.
3. Choose the ,Links' pane in the ,Info' panel.
4. In the ,Lag' field, type the lead time or lag time as a number followed by ,m' for minutes, ,h' for hours, ,d' for days, ,w' for weeks or ,mo' for months.

##### Note

You can quickly add lead or lag time to a successor task by double-clicking the link line on the Gantt Chart and then typing the amount of lead or lag time in the ,Lag' field.



### Relevant Toolbar Item



**,Info'**  
To open the Info panel.

#### 2.2.14 Rearrange Tasks

Although you can copy or move a task or resource at any time, it's best to do so before you establish task dependencies. When you copy or move a task or resource, iTTaskX, try's to reestablish task dependencies. You can copy or move tasks or resources in following views:

- ,Gantt Chart'
- ,Tracking Gantt'
- ,Task Sheet'
- ,Resource Sheet'
- and all custom views based on the views above



### Copy and paste a task or resource

1. MSelect the task(s) or resource(s) you want to copy.
2. Press ,COMMAND'-'C' to copy or ,COMMAND'-'X' to cut the task(s) or resource(s).
3. Select the row where you want to place the selection.
4. Press ,COMMAND'-'V' to paste the selection. iTTaskX will insert the selection under the selected row.

#### Notes

- When you copy a task, assignments and attached documents will be lost.
- iTTaskX copies the following associated information with the task or resource: notes and subtasks, if the selection is a summary task.

### Move a task or resource by dragging

1. Click on the task or resource in the sheet you want to move or select more tasks or resources by holding down the ,COMMAND' key.
2. Left mouse down and drag the row(s) where you want to place the selection.

#### Note

When you move a task by dragging in a other document, assignments and attached documents will be lost.

## 2.2.15 Delaying Tasks

### Interrupt a task

If you need to interrupt a task, you can split the task so that part of it starts later in the schedule.

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Select the task you want to split.
3. Click on the ,Split' toolbar icon.
4. On the tasks Gantt bar, click with pressed mousebutton on the area of the bar on the date where you want the split to occur and drag with pressed mousebutton the second part of the bar to the date that you want work to begin again.

#### Notes

- You can also split a task several times.
- To remove a split on a task, drag a portion of the Gantt bar so that it touches another portion.
- If you use any calendar to specify the split as non-working time instead of splitting the task, the non-working time will not appear as a split task on the Gantt Chart.

### Relevant Toolbar Item



**,Split'**

To split a task.

### Change the duration of a split task

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Position the cursor over the right end of the first or second portion of the split task, until the cursor changes to an four-way arrow.
3. Drag with pressed mousebutton to the left to shorten the duration of the portion, or drag to the right to lengthen the duration of the portion.

**Hint**

To change the duration of the entire task, type a new duration in the ,Duration' field. You may want to move portions of the split task after changing the duration.

**Move the second piece of a split task without moving the first**

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Position the cursor over the middle of the second portion of the split task, until the cursor changes to a four-way arrow.
3. Drag with pressed mousebutton the task bar left to start the portion earlier or drag it right to start it later.

**Note**

You can also change the start or finish date to move the entire task and its related portions.

**2.2.16 Setting Task Types****About task types**

iTaskX uses one of three task types to calculate the duration of tasks and subsequently their finish dates or their start dates.

By default, after you assign a resource, the task is scheduled according to the formula  $\text{Duration} = \text{Work} / \text{Units}$ . For any task, you can choose which piece of the equation iTaskX calculates by setting the task type.

**Notes**

- **Task Type A** characterization of a task based on which aspect of the task is fixed and which aspects are variable.
- **Finish Date** The date that a task is scheduled to be completed. This date is based on the tasks start date, duration, calendars, predecessor dates, task dependencies and constraints.
- **Start Date** The date when a task is scheduled to begin. This date is based on the duration, calendars and constraints of predecessor and successor tasks.

**Available task types**

- **Fixed Unit**  
A task in which the assigned resources is a fixed value and any changes to the amount of work or the tasks duration do not affect the tasks units. This is calculated as follows:  
 $\text{Duration} \times \text{Units} = \text{Work}$ .
- **Fixed Work**  
A task in which the amount of work is a fixed value and any changes to the tasks duration or the number of assigned resources do not affect the tasks work. This is calculated as follows:  
 $\text{Duration} \times \text{Units} = \text{Work}$ .
- **Fixed Duration**  
A task in which the duration is a fixed value and any changes to the work or the assigned resources, do not affect the tasks duration. This is calculated as follows:  $\text{Duration} \times \text{Units} = \text{Work}$ .

**iTaskX uses fixed units by default.**



Each of the task types affects scheduling when you edit one of the three elements as follows.

Task Type	You revise units...	You revise duration...	You revise work...
Fixed Unit task	Duration is recalculated	Work is recalculated	Duration is recalculated
Fixed Work task	Duration is recalculated	Units are recalculated.	Duration is recalculated
Fixed Duration task	Work is recalculated	Work is recalculated	Units are recalculated

### Set the task type to calculate task duration

For any task, you can change the task type.

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Select the task(s) you want to change, and then click the ,Info' toolbar icon.
3. Choose the ,Task information' pane in the ,Info' panel.
4. In the ,Task type' pop-up, select the task type you want to set.

#### Notes

- If you choose ,Fixed Work' in the ,Task type' pop-up, iTaskX cannot use ,Effort driven' for the task.
- You can view and change the task type for each task directly in your view by inserting the ,Type' column.

#### Relevant Toolbar Item



**,Info'**

To open the Info panel.

### 2.2.17 Baseline

#### About baseline

A baseline is the set of original start and finish dates, durations, work, and cost estimates that you should save after you have completed your project plan but before the project begins. It is the primary reference point against which you measure changes in your project. The baseline saves a lot of information, including totals for tasks, resources and assignments.

Because the baseline provides the reference points against which you compare actual project progress, it should include your best estimates for task duration, start and finish dates, costs and other project variables you want to monitor. Baseline information that consistently differs from current data shows that your original plan is inaccurate. Typically, this difference occurs if the scope or nature of the project has changed. If project stakeholders agree that the difference warrants it, you can clear and save a new baseline at any time during the project.

#### Working with a baseline

- **Save baseline**  
After completing your project plan, it's recommended to save a baseline. To save a baseline select ,Save Baseline' from the ,Tracking' menu.
- **Clear baseline**  
To clear a baseline select ,Clear Baseline' from the ,Tracking' menu.
- **Update baseline**  
Each iTaskX project can only have one Baseline. To update a baseline first clear the existing using ,Tracking' > ,Clear Baseline' and then save the new one using ,Tracking' > ,Save Baseline'.



## 2.3 Appearance

### 2.3.1 Working with Tables

Tables are a set of columns that shows specific information about tasks, resources and assignments. iTTaskX offers predefined tables like ,Entry Table', ,Usage Table', ,Work Table'... in the ,View' menu.

#### Hint

Holding down the ,CTRL' key while clicking on the table header brings up a shortcut menu which is listing the standard tables for the current view.

To show only the fields you want, you can customize the predefined tables. There are two kinds of tables: task tables (which you can apply to task views) and resource tables (which you can apply to resource views).

1. Choose ,View' > ,Customize Columns...' to open the ,Customize Columns' sheet.
2. In the ,Columns Name' list, click the check boxes on the left side of the column names you want to add to your view.
3. Click the ,OK' button.
4. The new column will be inserted as the last column. You can rearrange columns by clicking on the column header and dragging.

#### Hint

When you select a column name in the ,Columns Name' list, you see the description of the column under the ,Columns Name' list.

#### Note

All changes in the ,Customize Columns' sheet will only effect the current view. If you want to change columns for a other view, choose the view you want to change and open the ,Customize Columns' sheet again.

### 2.3.2 Working with Custom Views

If your current view does not display the kind of information you want, you can customize it so that it does. **For example**, create a new print view which contains only the table columns you need for your printout.

1. Choose ,View' > ,Custom Views' > ,New Custom View...' to open the ,New Custom View' sheet.
2. In the ,Name' field, type a name for the new custom view.
3. Select a standard view on which the new custom view is based on.
4. Click the ,OK' button.
5. Now customize you new view by adding tables, bar styles, timescal and other settings under ,Current View...' in the ,Format' menu like ,Show Project Summary', ,Grid Color', ,Document Color'...

#### Hints

- To restore a view to it's default settings, select the view you want to restore, choose ,Format' > ,Current View...' and click on the ,Restore Defaults' button in the ,Format Information' inpector.
- If you want to delete a custom view, open ,View' > ,Custom Views' > ,Manage Custom Views'. Select the custom view you want to delete and press the ,DELETE' key on your keyboard.

#### Note

All custom views are stored on your local machine (~/.Library/Application Support/iTTaskX/Customviews) and also available in other iTTaskX documents for the current user. When you exchange iTTaskX documents with other users, your custom views are not available.



### 2.3.3 Change the Font for a Single Row

To change the font for a single row select a row(s) like in the following picture.



1. Open ,Show Fonts' from ,Font' of the ,Format' menu or press ,COMMAND'-'T'.
2. Select a font style in the ,Family' column and then select the typeface in the ,Typeface' column. If you do not see all the font families you know are installed on your computer, select ,All Fonts' in the Collections column or type the name of the font you are looking for in the Search field at the bottom of the ,Font panel'. A preview of the selected font appears in the preview pane above the columns. If you do not see a preview pane, choose ,Show Preview' from the Action pop-up menu in the lower-left corner of the ,Font panel'.
3. Adjust the font size using the size slider or pop-up menu.
4. Change the font color by clicking the ,Text Color' button at the top of the ,Font panel'. Select a color in the ,Colors' window.
5. Adjust the typography settings of the selected font by choosing Typography from the Action pop-up menu. In the Typography window, click the disclosure triangles to see and select the different typography effects that are available for the selected font. Different fonts have different typography effects available.

#### Hint

If you need to switch fonts often, you can leave the ,Font panel' open. If it takes up too much space on your screen, you can shrink it by dragging its resize control (the bottom-right corner of the panel), so that only the font families and typefaces in your selected font collection are available in pop-up menus.

#### Note

It's only possible to change the font or font styles for the whole row!

### 2.3.4 Change the Text Formatting of a single Task Type

You can select fonts, font colors and even adjust the spacing and alignment of some fonts by selecting typography effects such as ligatures, letter case and number style variations, or extra position controls.

1. Choose ,Format' > ,Text Styles...' to open the ,Text Styles' sheet.
2. Select an item in the top of the sheet you want to change.
3. Press the ,Choose Font' button to bring up the ,Font panel' window.
4. Select a font style in the ,Family' column and then select the typeface in the ,Typeface' column. If you do not see all the font families you know are installed on your computer, select ,All Fonts' in the Collections column or type the name of the font you are looking for in the Search field at the bottom of the ,Font panel'. A preview of the selected font appears in the preview pane above the columns. If you do not see a preview pane, choose ,Show Preview' from the Action pop-up menu in the lower-left corner of the ,Font panel'.
5. Adjust the font size using the size slider or pop-up menu.
6. Change the font color by clicking the ,Text Color' button at the top of the ,Font panel'. Select a color in the ,Colors' window.
7. Adjust the typography settings of the selected font by choosing Typography from the Action pop-up menu. In the Typography window, click the disclosure triangles to see and select the different typography effects that are available for the selected font. Different fonts have different typography effects available.

#### Hint

If you need to switch fonts often, you can leave the ,Font panel' open. If it takes up too much space on your screen, you can shrink it by dragging its resize control (the bottom-right corner of the panel), so that only the font families and typefaces in your selected font collection are available in pop-up menus.

**Note**

All changes in that sheet will only effect the current view. If you want to change the font styles for a other view, click the ,Close' button to leave the sheet, choose the view you want to change and open the ,Text Styles' sheet again.

**2.3.5 Change the Appearance and Add Text to a Single Gantt Bar**

Choose ,Format' > ,Bar...' to change the appearance of a single Gantt bar in the ,Gantt Chart' view. Use it for:

- Change the look of a type of Gantt bar, including color, shape, shadow, start shape and color, and end shape and color.
- Change the information and position of text for a Gantt bar.
- Change the background color of the Gantt bar.

Change the appearance of a single Gantt bar

**• Start section**

**,Shape'** Indicates the shape of the symbol at the beginning of the selected bar. Click the arrow to change the beginning shape. If you want no symbol at the beginning of the bar, select the first option (empty).

**,Type'** Indicates the border style of the shape to be displayed at the beginning of the selected bar. Click the arrow to change the type. You can select ,Solid' or ,Framed'.

**,Color'** Indicates the color of the shape at the beginning of the selected bar. Click on the color field to change the color of the beginning shape.

**• Middle section**

**,Shape'** Indicates the shape of the selected bar. Click the arrow to change the bar shape. If you want no visible bar shape, click the first option (empty).

**,Type'** Indicates the border style of the selected bar. Click the arrow to change the type. You can select ,Solid' or ,Framed'.

**,Color'** Indicates the color of the selected bar. Click on the color field to change the bar's color.

**• End section**

**,Shape'** Indicates the shape of the symbol at the end of the selected bar. Click the arrow to add or change the end shape. If you want no symbol at the end of the bar, click the first option (empty).

**,Type'** Indicates the border style of the shape at the end of the selected bar. Click the arrow to change the type. You can select ,Solid' or ,Framed'.

**,Color'** Indicates the color of the shape at the end of the selected bar. Click on the color field to change the color of the end shape.

**• Shadow**

If you like to add a shadow to the selected bar, activate the ,Shadow' check box. Use the sliders beside the ,Shadow' check box to adjust opacity, blur, offset and angle.

Add text to a single Gantt bar





**,Left'**, **,Right'**, **,Top'**, **,Bottom'**, or **,Inside'** shows the name of the field whose contents will appear in position beside or on the Gantt bar. To add or change the text to be displayed for the selected Gantt bar, click in the field representing the position you want for the text (**for example**, **,Right'**), click on the arrow on the end of the text field and then select the an entry from the pop-up (**for example**, **,Start'** – iTaskX will replace **,Start'** with the start date and time of the task). All available task fields are listed. You can also combine automatic entry's and any other text you want to build custom labels. **For example**, **Start;-;Task Name;-;Finish;Any Text** (Note: All values must be separated with a semicolon **,;'**).

#### Notes

- If you add text to the top or bottom of the Gantt bar, the row height for the corresponding task sheet increases to accommodate the additional space needed. You control the height of the bars with the Font size.
- To remove text from a Gantt bar, click in the field, select the text you want to remove and then press **,DELETE'** on your keyboard.

### 2.3.6 Change the Appearance and Add Text of a single Task Type

Choose **,Format' > ,Bar Styles...'** to change the appearance of the Gantt bar for the selected task type. Use it for:

- Change the look of the Gantt bar, including color, shape, shadow, start shape and color, and end shape and color.
- Change the information and position of text displayed on the Gantt bar.

To change the appearance of a task type, choose **,Bar Styles...'** in the **,Format'** menu to bring up the **,Bar Styles'** sheet and select select a task type from the **,Format bar style for'** pop-up.

#### Change the appearance of the selected task type

Change the appearance of a task type in the middle of the sheet.

##### • Start section

**,Shape'** Indicates the shape of the symbol at the beginning of the selected bar. Click the arrow to change the beginning shape. If you want no symbol at the beginning of the bar, select the first option (empty).

**,Type'** Indicates the border style of the shape to be displayed at the beginning of the selected bar. Click the arrow to change the type. You can select **,Solid'** or **,Framed'**.

**,Color'** Indicates the color of the shape at the beginning of the selected bar. Click on the color field to change the color of the beginning shape.

##### • Middle section

**,Shape'** Indicates the shape of the selected bar. Click the arrow to change the bar shape. If you want no visible bar shape, click the first option (empty).

**,Type'** Indicates the border style of the selected bar. Click the arrow to change the type. You can select **,Solid'** or **,Framed'**.

**,Color'** Indicates the color of the selected bar. Click on the color field to change the bar's color.



- **End section**
  - ,Shape' Indicates the shape of the symbol at the end of the selected bar. Click the arrow to add or change the end shape. If you want no symbol at the end of the bar, click the first option (empty).
  - ,Type' Indicates the border style of the shape at the end of the selected bar. Click the arrow to change the type. You can select ,Solid' or ,Framed'.
  - ,Color' Indicates the color of the shape at the end of the selected bar. Click on the color field to change the color of the end shape.
- **Shadow section**
  - If you like to add a shadow to the selected bar, activate the ,Shadow' check box. Use the sliders beside the ,Shadow' check box to adjust opacity, blur, offset and angle.

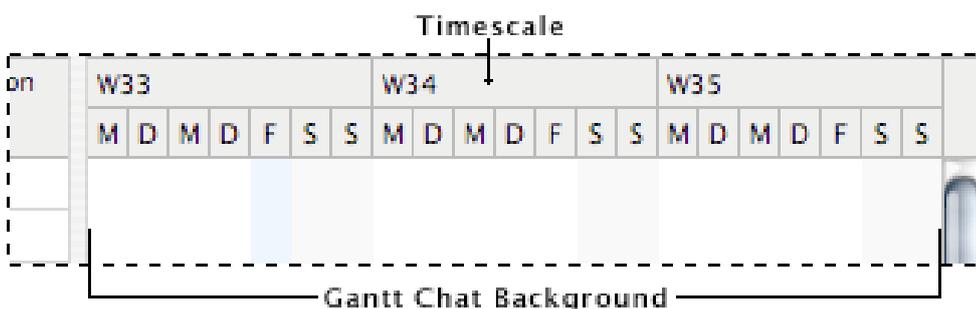
### Add text to the Gantt bar

At the bottom of the ,Bar Styles' sheet enter your text and choose the font style.

- ,Left', ,Right', ,Top', ,Bottom', or ,Inside' Shows the name of the field whose contents will appear in position beside or on the Gantt bar. To add or change the text to be displayed for the selected Gantt bar, click in the field representing the position you want for the text (**for example**, ,Right'), click on the arrow on the end of the text field and then select the an entry from the pop-up (**for example**, ,Start' – iTTaskX will replace ,Start' with the start date and time of the task). All available task fields are listed. You can also combine automatic entry's and any other text you want to build custom labels. **For example**, Start;-;Task Name;-;Finish;Any Text (Note: All values must be separated with a semicolon ,;').
- If you add text to the top or bottom of the Gantt bar, the row height for the corresponding task sheet increases to accommodate the additional space needed. You control the height of the bars with the Font size.
  - To remove text from a Gantt bar, click in the field and then press ,DELETE' on your keyboard to clear the field name.

### 2.3.7 Change the Timescale

The timescale is the gray band containing the timescale legend at the top of the ,Gantt Chart' and ,Tracking Gantt' views. The area below the timescale graphically presents task information. The following picture shows a timescale.





- Choose **Format > Timescale...** to open the **Format Timescale** sheet. The timescale consists of a top, middle and bottom tier. By default, only the middle and bottom tiers are displayed. To display the top tier, select in that sheet in the **Timeline** pop-up **Three tiers (Top, Middle, Bottom)**. The tiers of the timescale can display years, quarters, months, weeks, days, hours and minutes. By default, the top tier displays months, the middle tier displays weeks and the bottom tier displays days. In the **Count** field, type a number to specify the frequency of unit labels on the timescale tier.  
**For example**, if the unit is **weeks** and you type 2, then the timescale tier is separated into 2-week segments. To condense or spread out the columns of the timescale tier, type or select the percentage you want in the **Scale** field.
- In the **Gantt Chart** and **Tracking Gantt** view, gray vertical bands represent non-working time. To change the appearance of these bands, make your changes (**Draw**, **Calendar to use** and **Color**) under **Non-working time** in that sheet.
- Gridlines are the horizontal and vertical lines that appear in many iTTaskX views. You can change the colors and visibility for gridlines. To format gridlines choose **Format > Current View...**.

### Hint

Holding down the **CTRL** key while clicking on the timescale brings up a shortcut menu which is listing the commands you can use on the timescale. iTTaskX has several shortcut menus. Use shortcut menus to save time and make it easier to work with iTTaskX files.

### Relevant Toolbar Items



#### **Zoom Actual**

Display the timeline in its actual size.



#### **Zoom In**

To zoom in.



#### **Zoom Out**

To zoom out.

### 2.3.8 Change the Appearance of Non-working Time

On the **Gantt Chart** and **Tracking Gantt**, you can distinguish vacations and other non-working days from working days by using calendars and colors.

1. Press **F1** or choose **Gantt Chart** under **Current View** of the **View** menu to open the **Gantt Chart** view.
2. Choose **Format > Timescale...**.
3. Under **Non-working time** select a calendar and then choose a color for displaying non-working times.



## 2.4 Working with Calendars

### 2.4.1 About Calendars

iTTaskX uses calendars to determine resource availability and the way tasks are scheduled:

- **Base calendar**  
A base calendar is used as a template that the project calendar, resource calendars, or task calendars are based on. Two base calendars are provided with iTTaskX:
  - Standard (8:00 A.M. to 5:00 P.M. weekdays, with an hour off for lunch)
  - 24-Hours
- **Calendar for the Project**  
The default calendar in a project.
- **Calendar for Resources**  
For each resource you enter, iTTaskX use a resource calendar. You can modify those calendars like other under ,Edit' > ,Working Times...'. You can also create and assign resource calendars for individual resources or resource groups to indicate specific working hours.
- **Calendar for Tasks**  
By default Tasks are scheduled based on the working times in the project calendar; however, you can customize the working times for a task, by using a task calendar, if you have tasks to be completed at different times, especially tasks that are independent of resources. iTTaskX calculates when a resource and task are scheduled to work by using the calendars in the following order: project calendar, resource calendar and task calendar. If a task has no resources and no task calendar, it's scheduled according to the project calendar. If a task has resources assigned and no task calendar, it's scheduled according to the resource calendars. You can set the task calendar to ignore the resource calendars if you need to schedule a task during a non-working time for a resource. In the ,Task Name' field, click the task with the task calendar that you want to override the resource calendars of any assigned resources. To ignore resource calendars on tasks, select the task, click the ,Info' toolbar icon and then choose the ,Task information' pane in the ,Info' panel. Select the ,Ignore resource calendar' check box to have the task calendar override all applicable resource calendars.

#### Relevant Toolbar Item



,Info'

To open the Info panel.

### 2.4.2 Change Task Scheduling Defaults

You can change task scheduling defaults to indicate how much time you want to constitute a day, a week and a month when entering and reviewing durations in a task view. It can also help you synchronize task scheduling with what you've established in the working time calendars for resource availability.

1. Open ,Edit' > ,Project Options...' and then click the ,Calendar' tab.
2. To change the default start or end time for scheduled tasks, change the time in the ,Default start time' and ,Default end time' field.
3. If you want to change how many hours iTTaskX schedules for 1 day, enter it in the ,Hours per day' field.  
**For example**, if you want iTTaskX to schedule 4 hours when you enter a 1-day duration, type or select ,4' in the ,Hours per day' field.
4. If you want to change how many hours iTTaskX schedules for 1 week, enter it in the ,Hours per week' field.  
**For example**, if you want iTTaskX to schedule 20 hours when you enter a 1-week duration, type or select ,20' in the ,Hours per week' field.



5. If you want to change how many days iTTaskX schedules for 1 month, enter it in the ,Days per month' field.  
**For example**, if you want iTTaskX to schedule 24 days when you enter a 1-month duration, type or select ,24' in the ,Days per month' field.

**Note**

The settings you make on the ,Calendar' tab do not change the project calendar or resource calendars. You can change project or resource calendars by using ,Working Time...' in the ,Edit' menu.

### 2.4.3 Set Working Time for the Project Calendar

To reflect the general working days and hours of your project, you can specify them on the project calendar, as well as regular non-working times, such as weekends, evenings and special days off like holidays.

1. Choose ,Edit' > ,Working Time...'.
2. In the ,Edit Calendar' pop-up select the project calendar.  
The project calendar for the current project is followed by ,(Project Calendar)'.
3. To change one day of the week for the entire calendar (**for example**, to have Fridays end at 4:00 P.M.), click the abbreviation for that day ,F' at the top of the calendar.  
To change all the working days (**for example**, to have the working day begin at 9:00 A.M.), click the abbreviation at the top of the first day and then hold down ,SHIFT' and click the abbreviation at the top of the last day.
4. Click ,Use default', ,Non-working time', or ,Non-default working time'.
5. If you clicked ,Non-default working time', type the times you want work to start in the ,From' fields and the times you want work to end in the ,To' fields.

**Note**

When setting up a shift that spans 12:00 midnight, pay close attention to the working hours per day and not just to the shift hours. For example, to set up a shift that runs from 10:00 P.M. to 6:00 A.M. weekdays, you would enter the following non-default working times:

- Mondays 22:00 to 24:00.
- Tuesdays through Fridays 00:00 to 06:00 and 22:00 to 24:00.
- Saturdays 00:00 to 06:00.

- You also can import iCal files (.ics) for non-working times.

### 2.4.4 Create a Calendar for a Task or Resource

By default, tasks and resources are scheduled based on the project calendar. To define unique or specific exceptions, such as machinery that runs during non-working time, you can create a new calendar for individual tasks.

1. Open ,Edit' > ,Working Time...'.
2. Click on the ,Plus' icon to create a new calendar.
3. In the ,Name field', type a name for your new calendar.  
If you want to begin with a base calendar, click ,Create new base calendar'.  
If you want to create a new calendar based on an existing calendar, click ,Make a copy of' and then select the calendar name in the calendar pop-up.
4. Click the ,OK' button.
5. To select adjacent days on the calendar, hold down ,SHIFT' key, and then click the first and last days you want.  
To select nonadjacent days on the calendar, hold down ,COMMAND' key and then click the the days you want.  
To change a day of the week for the entire calendar, click the abbreviation for the day in the top row of the calendar.



6. Click ,Use default', ,Non-working time', or ,Non-default working time'.
7. If you clicked ,Non-default working time', type the times you want work to start in the ,From' fields and the times you want work to end in the ,To' fields.

**Note**

After you create a calendar, you need to assign that calendar to a task or resource.

### 2.4.5 Assign a Calendar to a Task

By default, tasks are scheduled based on the project calendar. To define unique or specific exceptions for working and non-working time, a new calendar can be created and assigned to the task.

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Select the task to which you want to assign a calendar and then click the ,Info' toolbar icon.
3. Choose the ,Task information' pane in the ,Info' panel.
4. In the ,Calendar' pop-up select a calendar you want to use for the task.
5. If applicable, click the ,Ignores resource calendars' check box to have the task calendar ignore all resource calendars.

**Note**

If you choose to have iTaskX ignore resource calendars, a task will be scheduled even if resources assigned to the task have non-working time set in their resource calendar.

#### Relevant Toolbar Item



**,Info'**

To open the Info panel.

### 2.4.6 Assign a Calendar to a Resource

After creating a calendar for a specialized schedule, other than the project calendar which can be set in the ,Item Information' inspector, you can base a resource working times on this calendar.

1. Press ,F7' or choose ,Resource Sheet' under ,Current View' of the ,View' menu to open the ,Resource Sheet' view.
2. Select the resource you want to assign a calendar to and then click the ,Info' toolbar icon.
3. Choose the ,Resource information' pane in the ,Info' panel.
4. In the ,Calendar' pop-up select a calendar you want to use for the resource.  
**For example**, if the selected resource works with the ,24 Hours' calendar, select ,24 Hours' to assign this as the resource calendar.  
By default, the project calendar is used as the resource calendar.

**Note**

It's also possible to change the resource calendars directly in the ,Resource Sheet' by using the ,Calendar' column.

#### Relevant Toolbar Item



**,Info'**

To open the Info panel.



## 2.5 Resources & Assignments

### 2.5.1 Add Resources to your Project

#### Add work resources from the Address Book

Create a list of resources that will make up your team and carry out the project tasks.

1. Press ,F7' or choose ,Resource Sheet' under ,Current View' of the ,View' menu to open the ,Resource Sheet' view.
2. Select ,Address Book...' from ,New Resource From' of the ,Insert' menu to open the ,Search in Address Book' sheet.
3. In the search field type the resource you want to find.  
iTTaskX displays the number of matching resources found.
4. Select the resource you want and click the ,Add selected Resources' button.  
It's also possible to select multiple resources.
5. Repeat for each resource(s) you want to find.
6. After you added all resources click the ,Close' button to leave the sheet.  
In the ,Resource Sheet' the ,Type' field is set to ,Work', because this is a work resource.
7. In the ,Max. Units' field for the resource, enter the number of total units that this resource is available. ,Max. Units' specifies how much this resource is available on this project, for example, part-time or multiples.  
**For example**, if you have a resource who is available to your project two days a week, you can enter maximum units as ,40%'. You can use maximum units to specify multiple availability of a resource designation. **For example**, suppose you have a resource named Engineers, representing three individual engineers on your team. You can enter the maximum units for Engineers as ,300%'. You can schedule all three engineers for full-time work at one time without the Engineers resource being overallocated.  
You can enter maximum units as a percentage (50%, 100%, 300%).
8. If necessary enter additional information for each resource.

#### Hint

The pop-up menu in the search field allows you to specify where you want to search. You can choose between, search in ,Address Book', ,Directory Server' or ,Exchange Public Folders'.

#### Note

Before you can search a ,Directory Server' or ,Exchange Public Folders' you have to configure the servers under ,Preferences...' in the ,iTTaskX' menu.

#### Add work resources from a Directory Server

Create a list of resources that will make up your team and carry out the project tasks.

1. Press ,F7' or choose ,Resource Sheet' under ,Current View' of the ,View' menu to open the ,Resource Sheet' view.
2. Select ,Directory Server...' from ,New Resource From' of the ,Insert' menu to open the ,Search in Directory Server' sheet.
3. In the search field type the resource you want to find.  
iTTaskX displays the number of matching resources found.
4. Select the resource you want and click the ,Add selected Resources' button.  
It's also possible to select multiple resources.
5. Repeat for each resource(s) you want to find.
6. After you added all resources click the ,Close' button to leave the sheet.  
In the ,Resource Sheet' the ,Type' field is set to ,Work', because this is a work resource.



7. In the ,Max. Units' field for the resource, enter the number of total units that this resource is available. ,Max. Units' specifies how much this resource is available on this project, for example, part-time or multiples.  
**For example**, if you have a resource who is available to your project two days a week, you can enter maximum units as ,40%'. You can use maximum units to specify multiple availability of a resource designation. **For example**, suppose you have a resource named Engineers, representing three individual engineers on your team. You can enter the maximum units for Engineers as ,300%'. You can schedule all three engineers for full-time work at one time without the Engineers resource being overallocated.  
You can enter maximum units as a percentage (50%, 100%, 300%).
8. If necessary enter additional information for each resource.

#### Hint

The pop-up menu in the search field allows you to specify where you want to search. You can choose between, search in ,Address Book', ,Directory Server' or ,Exchange Public Folders'.

#### Note

Before you can search a ,Directory Server' or ,Exchange Public Folders' you have to configure the servers under ,Preferences...' in the ,iTTaskX' menu.

#### Add work resources from a Exchange Public Folder

Create a list of resources that will make up your team and carry out the project tasks.

1. Press ,F7' or choose ,Resource Sheet' under ,Current View' of the ,View' menu to open the ,Resource Sheet' view.
2. Select ,Exchange Public Folder...' from ,New Resource From' of the ,Insert' menu to open the ,Search in Exchange Public Folder' sheet.
3. In the search field type the resource you want to find.  
iTTaskX displays the number of matching resources found.
4. Select the resource you want and click the ,Add selected Resources' button.  
It's also possible to select multiple resources.
5. Repeat for each resource(s) you want to find.
6. After you added all resources click the ,Close' button to leave the sheet.  
In the ,Resource Sheet' the ,Type' field is set to ,Work', because this is a work resource.
7. In the ,Max. Units' field for the resource, enter the number of total units that this resource is available. ,Max. Units' specifies how much this resource is available on this project, for example, part-time or multiples.  
**For example**, if you have a resource who is available to your project two days a week, you can enter maximum units as ,40%'. You can use maximum units to specify multiple availability of a resource designation. **For example**, suppose you have a resource named Engineers, representing three individual engineers on your team. You can enter the maximum units for Engineers as ,300%'. You can schedule all three engineers for full-time work at one time without the Engineers resource being overallocated.  
You can enter maximum units as a percentage (50%, 100%, 300%).
8. If necessary enter additional information for each resource.

#### Hint

The pop-up menu in the search field allows you to specify where you want to search. You can choose between, search in ,Address Book', ,Directory Server' or ,Exchange Public Folders'.

#### Note

Before you can search a ,Directory Server' or ,Exchange Public Folders' you have to configure the servers under ,Preferences...' in the ,iTTaskX' menu.



### Enter work resources manually

Create a list of resources that will make up your team and carry out the project tasks.

1. Press ,F7' or choose ,Resource Sheet' under ,Current View' of the ,View' menu to open the ,Resource Sheet' view.
2. In the ,Resource Name' field, type a resource name.
3. Specify the resource type.  
To specify that this resource is a work resource, in the ,Type' field, select ,Work'.
4. In the ,Max. Units' field for the resource, enter the number of total units that this resource is available. ,Max. Units' specifies how much this resource is available on this project, for example, part-time or multiples.  
**For example**, if you have a resource who is available to your project two days a week, you can enter maximum units as ,40%'. You can use maximum units to specify multiple availability of a resource designation. **For example**, suppose you have a resource named Engineers, representing three individual engineers on your team. You can enter the maximum units for Engineers as ,300%'. You can schedule all three engineers for full-time work at one time without the Engineers resource being overallocated.  
You can enter maximum units as a percentage (50%, 100%, 300%).
5. If necessary enter additional information like email address for each resource.

### Enter material resources

#### About material resources

Material resources are supplies, stock, or other consumable items used to complete tasks in a project. Examples of material resources include concrete, steel, pipe, wood and glass. When you set up a material resource, you define the material label, or unit of measurement, for the material, such as cubic yards, tons, or boxes. When you assign a material resource to a task, you specify the material consumption for the assignment, **for example**, 10 tons of steel for a specific assignment.

#### Enter material resources

1. Press ,F7' or choose ,Resource Sheet' under ,Current View' of the ,View' menu to open the ,Resource Sheet' view.
2. In the ,Resource Name' field, type the name of the material resource.
3. In the ,Type' field, select ,Material'.
4. In the ,Material Label' field, enter a label that indicates the units used to measure this material (**for example**, yards, ton, or boxes).

### 2.5.2 Update Resource Names

Using the ,Resource Sheet' view, you can quickly edit your resources.

1. On the ,View' menu, point to ,Current View' > ,Resource Usage' and then select ,Entry Table'.
2. To update an existing resource name, in the ,Resource Name' field that contains the resource name you want to update (such as Chef Engineer), type the new resource name (such as Christian Viehböck).

### 2.5.3 About Effort driven Scheduling

When you assign or remove people from a task, iTaskX lengthens or shortens the duration of the task based on the number of resources assigned to it, but it does not change the total work for the task. This is called effort driven scheduling and is the default when you assign resources to tasks.

As resources are added to a task, the total work on the task stays the same. However, the amount of work distributed to the resources assigned to the task changes.



Effort driven scheduling only takes effect when resources are added to or removed from a task. Effort driven calculation rules are not applied when you change work, duration and unit values for resources already assigned to a task.

**When working with effort driven scheduling, keep the following in mind:**

- The effort driven calculations apply only after the first resources are initially assigned to the task. After the first resources are assigned, the work value doesn't change as new resources are assigned to or removed from the same task.
- If the assigned task type is ,Fixed Units', assigning additional resources shortens the duration of the task.
- If the assigned task type is ,Fixed Duration', assigning additional resources decreases the individual unit values for resources.
- If the assigned task type is ,Fixed Work', assigning additional resources shortens the duration of the task.

#### Note

To turn off effort driven scheduling for all new tasks, select ,Project Options...' from the ,Edit' menu and then click the Schedule tab. Clear the ,New tasks are effort driven' check box.

### 2.5.4 Assigning Resources

You assign resources to tasks to clarify responsibility for getting those tasks done. Assigning resources also helps you determine how long it will take for a task to get done and, if you track costs, how much the task will cost. A resource can be a single person, a generic resource that can be replaced later, a group (**for example**, programmers), a piece of equipment (**for example**, computer), or material resources consumed in the course of accomplishing the task.

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Select the task(s) to which you want to assign a resource.
3. Click on the ,Assignments' icon in the toolbar to bring up the ,Resource assignment' pane of the ,Info' panel.
4. All added resources are listed. To assign a resource, activate the assign symbol left beside the desired resource name.

#### Assign a single work resource full time

Make sure that the ,Units' field indicates ,100%' for the selected resource.

#### Assign a single work resource part time

In the ,Units' field, type a percentage less than ,100%'.

This amount should represent the percentage of working time you want the resource to spend on the task. **For example**, if the resource will be working on this task half time, type ,50%'.

#### Assign a group of multiple work resources

In the ,Units' field, type a percentage amount greater than ,100%'.

This amount should represent the level of effort this group of resources will be working. **For example**, if the resource is Operators, there are three of them and you want to assign all three of them full time, type ,300%'.

#### Specify the consumption rate of a material resource

In the ,Units' field, type a decimal that indicates the amount of material to be used for this assignment.

**For example**, if you're using 20 yards of lumber, type ,20'.

If the amount of material used depends on the task duration, enter the rate of use by adding a slash ,/' and the abbreviation.

**For example**, if 20 yards of lumber is used per week, enter ,20/w'.

**Note**

In that pane it's also possible to create a new ,work' resources. To create a new resource, double-click in a empty row in the ,Resource name' column and enter the resource name.

5. After you assigned all resources to the selected task, click on the ,Assign' button to set the assignments.

**Hints**

- If you like to remove a assignment from a task, deactivate the assign symbol left beside the desired resource name and then click on the ,Assign' button.
- To remove a resource from your project, select the desired resource and press the ,Minus' button.

**Notes**

- Tasks with assigned resources have a icon  in the ,Task Info' column.
- You can't assign resources to a summary task.

**Relevant Toolbar Item****,Assignments'**

To add, replace or remove resource assignments for the selected task.

**2.5.5 Replace a Resource Assignment**

Rather than removing one resource assignment from a task and then assigning another resource, you can replace one resource with another. You might want to replace a resource to resolve overallocations, reduce costs, increase efficiency, or increase quality.

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Select the task with the resource that you want to replace.
3. Click on the ,Assignments' icon in the toolbar to bring up the ,Resource assignment' pane of the ,Info' panel.
4. Deactivate the assign symbol left beside the assigned resource name and activate the assign symbol left beside the desired resource name.

You can also replace a resource by typing the name of a new resource over the existing. Information about resources you add in the sheet is also entered in the ,Resource Sheet' view.

**Assign a single work resource full time**

Make sure that the ,Units' field indicates ,100%' for the selected resource.

**Assign a single work resource part time**

In the ,Units' field, type a percentage less than ,100%'.

This amount should represent the percentage of working time you want the resource to spend on the task. For example, if the resource will be working on this task half time, type ,50%'.

**Assign a group of multiple work resources**

In the ,Units' field, type a percentage amount greater than ,100%'.

This amount should represent the level of effort this group of resources will be working. **For example**, if the resource is Operators, there are three of them and you want to assign all three of them full time, type ,300%'.



**Specify the consumption rate of a material resource**

In the ,Units' field, type a decimal that indicates the amount of material to be used for this assignment.

**For example**, if you're using 20 yards of lumber, type ,20'.

If the amount of material used depends on the task duration, enter the rate of use by adding a slash ,/' and a duration code or abbreviation.

**For example**, if 20 yards of lumber is used per week, enter ,20/w'.

5. After you replaced resources for the selected task, click on the ,Assign' button to leave the sheet.

**Notes**

- iTaskX does not remove or change the resource if actual work has been completed on the assignment; the replacement resource is assigned the remaining work from the original assignment.
- You should not replace a work resource with a material resource or vice versa.

**Relevant Toolbar Item**



**,Assignments'**

To add, replace or remove resource assignments for the selected task.

**2.5.6 Remove a Resource Assignment**

You might remove a resource assignment from a task to account for overallocation or underallocation, or to control costs.

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Select the task with the resource that you want to remove.
3. Click on the ,Assignments' icon in the toolbar to bring up the ,Resource assignment' pane of the ,Info' panel.
4. Deactivate the assign symbol left beside the desired resource name.
5. Click on the ,Assign' button to remove the assignments.

**Notes**

- As you remove assigned resources from tasks, the durations for those tasks might change. The work assigned to the removed resources is redistributed to the remaining assigned resources. If you do not want durations to change, turn off ,Effort driven' scheduling for the task.
- When you remove a resource from a task, the work assigned to the removed resource is automatically distributed among the remaining resources for tasks that are ,Effort driven' and not ,Fixed Work'. Otherwise, you can manually adjust the work to redistribute it among the remaining resources.
- If you remove the only resource from a ,Fixed Units' or ,Fixed Duration' task, the work value disappears. To keep the work value, consider replacing the resource with a placeholder resource. This is particularly important if you use work values to help build your schedule.
- To change settings for ,Effort driven', ,Fixed Work', ,Fixed Units' or ,Fixed Duration' task, select the task you want to change, click on the ,Info' toolbar icon to bring up the ,Task information' pane in the ,Info' panel and make your changes there.

**Relevant Toolbar Items**



**,Assignments'**

To add, replace or remove resource assignments for the selected task.



**,Info'**

To open the Info panel.



### 2.5.7 View the Task List and Resource Assignments

You can review current resource assignments in the task list to see if all tasks are covered, or you can review a list of assignments by resource to see the workload of each resource.

#### Review the task list with assignments listed

1. Press ,F6' or choose ,Task Usage' under ,Current View' of the ,View' menu to open the ,Task Usage' view.
2. Review the assignment information in the task list. The assignments are listed under each task, showing the assigned resource name and other assignment information.
3. **To see more information about work**  
On the ,View' menu, point to ,Current View' > ,Task Usage', and then select ,Work' to review the ,Work', ,Baseline Work', ,Work Variance', ,Actual Work', ,Remaining Work', ,Overtime Work', ,Actual Overtime Work', ,Remaining Overtime Work', ,Work Complete' and ,Overallocated' fields for each resource assignment.  
**To see more information about baseline dates**  
On the ,View' menu, point to ,Current View' > ,Task Usage', and then click ,Variance' to review the ,Start', ,Finish', ,Baseline Start', ,Baseline Finish', ,Start Variance', and ,Finish Variance' fields for each assignment.

#### Review the resource list with assignments listed

1. Press ,F8' or choose ,Resource Usage' under ,Current View' of the ,Current View' menu to open the ,Resource Usage' view.
2. Review the assignment information in the resource list. The assignments are listed under each resource, showing the task assigned to the resource, along with other assignment information.
3. **To see more information about work**  
On the ,View' menu, point to ,Current View' > ,Resource Usage', and then select ,Work' to review the ,Work', ,Baseline Work', ,Work Variance', ,Actual Work', ,Remaining Work', ,Overtime Work', ,Actual Overtime Work', ,Remaining Overtime Work', ,Work Complete' and ,Overallocated' fields.

### 2.5.8 Resolving Resource Overallocation

A resource is overallocated when it is assigned too much work to complete within the resource available time. You can resolve resource overallocations by adjusting either tasks or resources in your project.

#### Note

In resource sheets, overallocated resources are marked with a check box icon in the ,Overallocated' column.

#### A resource overallocation can be caused by:

- **A resource assigned to work full-time on more than one task at the same time.**  
**For example,** if you assign a resource to two tasks of eight hours each on the same day, then the resource is overallocated because only one eight-hour task can be accomplished on that day. To view a resource workload, press ,F8' or select ,Resource Usage' under ,Current View' in the ,View' menu. Look at the number of tasks assigned during times of overallocation.



- **A resource assigned to work full-time on more than one task at the same time.**  
**For example,** if you assign a resource to two tasks of eight hours each on the same day, then the resource is overallocated because only one eight-hour task can be accomplished on that day. To view a resource workload, press ,F8' or select ,Resource Usage' under ,Current View' in the ,View' menu. Look at the number of tasks assigned during times of overallocation.
  - **Increased duration of tasks.**  
If you increase a tasks duration, then the amount of work assigned to the resource also increases and may cause the resource to have too much work at one time. To view a resource workload, press ,F8' or select ,Resource Usage' under ,Current View' in the ,View' menu. Look at the number of hours of work assigned.
  - **Decreased unit availability for resources.**  
**For example,** a resource availability is reduced from 100% units to 50% units because it is working part-time. Or, more specific non-working time is entered on the resource calendar, such as Monday through Friday, 8:00 A.M. to 12:00 A.M. To see if non-working time is entered on the resource calendar, select ,Working Times...' in the ,Edit' menu and choose the calendar which is used for the resource.
  - **The project not accounting for the extra time a resource spends on a task.**  
You can account for overallocations, rather than resolve them, by adding overtime. Overtime is the amount of work on an assignment that is scheduled beyond the regular working hours of an assigned resource and charged at the overtime rate. ,Overtime Work' indicates the amount of the assignment's work that is specified as overtime work.
1. To enter overtime work select ,Task Usage' or ,Resource Usage' under ,Current View' in the ,View' menu.
  2. Select the resource (not the task) and enter the overtime work in the ,Overtime Work' field.



## 2.6 Tracking Progress

### 2.6.1 About Tracking

The following task information help you analyze progress as you track tasks in your project: duration, work, start date, finish date and cost.

Variations of each of these fields help you compare and evaluate your progress: planned, scheduled, actual and remaining.

**For example**, for one task, there can be fields of information containing planned work, scheduled work, actual work and remaining work. The contents of these fields might match one another, or they might all be different. Variances between certain fields can also be examined for useful tracking information. For this reason, these fields are referred to as tracking fields.

#### Planned or baseline information

Planned information is also known as baseline information. Examples of fields containing baseline information include ,Baseline Work', ,Baseline Start', ,Baseline Cost' and so on.

When you build and refine your project to the point where you're confident you can start the project, you have a good beginning point, or baseline. If you save baseline task information at that point, at later points throughout the project you can compare your current progress against your initial plan. Saving the baseline is essential for meaningful project tracking and analysis.

To save baseline information, select ,Tracking' > ,Save Baseline'. When you save a baseline, the five key pieces of information: work, cost, duration, start date and finish date, are saved for each task in the project. Later when you're tracking a particular task, you can quickly see whether you're using more or less work or cost than you had originally planned, or if the task is starting or finishing earlier or later than planned. The baseline information is used to calculate variances against scheduled information.

#### Note

You can only save one Baseline. To save a new Baseline first clear the existing using ,Tracking' > ,Clear Baseline' and then save the new one using ,Tracking' > ,Save Baseline'.

#### Scheduled information

Scheduled information is the current, most up-to-date task information. Fields containing scheduled information are ,Duration', ,Work', ,Start', ,Finish', and ,Cost'. The scheduled ,Duration', ,Work' and ,Cost' fields represent the total amount for that task.

When you first begin your project, the scheduled information is similar, if not identical, to your baseline planned information. However, as tasks are completed, you make adjustments and enter actual information. You find that one task needs three more days than first expected. Another task was able to start a day early. Another task incurred an unexpected cost. You find you need to change a constraint on one task and add a task dependency on another. With these adjustments, the scheduled information is recalculated to provide you with the most up-to-date picture of your project.

When you start entering actual information on in-progress tasks, scheduled information takes that into account and recalculates accordingly. For example, scheduled work is calculated as Actual Work + Remaining Work. For completed tasks, scheduled information is the same as actual information.

#### Actual information

Actual information reflects how the task was finally accomplished. You started with the planned projection of duration, work, cost and start and finish dates. You enter progress information, or actuals, for tasks and end up with the real picture of the completion of the task. Actuals tell you how much the task really cost, how many days of work it really took, the actual duration and the real start and finish dates.

You enter actual information in fields such as ,Actual Work', ,Actual Duration', ,Actual Start', ,Actual Finish' and ,Actual Cost'. If you enter actual information in one or two fields, the other actual



information can be calculated for you. For example, if you enter the ,Actual Finish' date, the ,Actual Duration', ,Actual Start' and other fields can be calculated. The same is true if you enter other tracking information, such as percentage complete.

### Remaining information

For tasks not yet started or tasks in progress, there exists remaining work, remaining cost and remaining duration. These fields estimate the amount of time and cost left before the task is complete. Remaining fields are a projection of the future.

For tasks not yet started, the contents of the ,Remaining Work' field are the same as that of the scheduled ,Work' field. For tasks in progress, remaining work is calculated as Work – Actual Work. The same is true for the ,Remaining Cost' and ,Remaining Duration' fields. However, the ,Remaining Work' field can be edited, as can the ,Actual Work' and ,Work' fields.

### Variance information

If you saved a baseline, then you can take advantage of the calculations in the ,Variance' fields. Examples include ,Work Variance', ,Cost Variance', ,Duration Variance', ,Start Variance' and ,Finish Variance'.

Your current scheduled information is compared with your original planned information. The variance fields shows the calculated difference between planned and scheduled information. **For example**, the ,Work Variance' field shows the difference between the ,Baseline Work' and ,Work' fields.

### Reviewing tracking fields

You can add custom columns to any table view. **For example**, you might want to insert the ,Baseline Duration' column next to the ,Duration' field in the ,Gantt Chart' view. On the ,View' menu, select ,Customize Columns...' and then click the check box(es) on the left of the field you want to show in the view. New columns will be inserted as the last column. To arrange the new column(s) click on the column header and drag.

You can also apply a table that's already designed with several tracking fields. Examples include the ,Tracking Table', ,Work Table', ,Cost Table' and ,Variance Table'.

### Hint

You can save or manage your custom views under ,Custom Views...' in the ,View' menu.

## 2.6.2 Update Actual Start and Finish Dates

1. Press ,F1' or choose ,Gantt Chart' under ,Current View' of the ,View' menu to open the ,Gantt Chart' view.
2. Select the task you want to update.
3. Select ,Tracking' > ,Update Task...' to open the ,Update Task' sheet.
4. Under ,Actual', type or choose the dates in the ,Start' and ,Finish' pop-up fields.
5. Click on the ,OK' button.

### Note

Entering an actual start date or actual finish date for a task changes the corresponding scheduled date for that task. Baseline dates, are not affected by changes you make to the actual or scheduled dates. If you enter an actual finish date for a task, iTAskX calculates it's percent complete to 100%.

### Hint

If a number of tasks started and finished on time, you can set the actual start and actual finish information for all of those tasks at once. In the ,Task Name' field, hold down ,COMMAND' key and click the tasks that started and finished on time. Select ,Tracking' > ,Update Project...' to open the ,Update Project' sheet. Click ,Update work as complete through', type or choose a date and then under ,Update', click ,Selected tasks'.



### 2.6.3 Update Actual Work

If you know the amount of work that has been performed on a task, you can enter the actual work for the task.

1. Choose in the ,View' menu' under ,Current View' > ,Task Sheet' > ,Work Table'.
2. Enter the actual work values for the tasks you want to update.

#### Note

When you specify the actual work for a task, iTTaskX calculates the percentage of work complete and remaining work according to the formulas: Percent Work Complete = Actual Work / Work and Remaining Work = Work - Actual Work.

### 2.6.4 Update Actual Duration

1. Choose in the ,View' menu' under ,Current View' > ,Task Sheet' > ,Tracking Table'.
2. In ,Actual Duration' field, enter the actual durations for the tasks you want to update.

#### Note

When you specify the actual duration for a task, iTTaskX calculates the percentage of completion and remaining duration according to the formulas: Percent Complete = Actual Duration / Duration and Remaining Duration = Duration - Actual Duration.

### 2.6.5 Update Completed Tasks Quickly

If you have tasks in your project that have been completed as scheduled, you can quickly update them all to 100% percent complete for a date you specify.

1. Press ,F2' or choose ,Tracking Gantt' under ,Current View' of the ,View' menu to open the ,Tracking Gantt' view.
2. Select ,Tracking' > ,Update Project...' to open the ,Update Project' sheet.
3. Select ,Update work as complete through' and then type or choose the date through which you want progress updated.  
If you do not specify a date, iTTaskX uses the current date.
4. Select ,Entire project'.
5. Click on the ,OK' button.

#### Note

When you perform the above steps, previously entered percentage of completion values for tasks with finish dates earlier than the ,Update work as complete through' date are replaced by 100%.

### 2.6.6 Update Remaining Duration or Work

#### Update remaining duration

If you know that a task will take more or less time than iTTaskX has calculated, you can specify the remaining duration.

1. On the ,View' menu, point to ,Current View' > ,Task Sheet' and select ,Tracking Table'.
2. In the ,Remaining Duration' field, type the remaining durations for the tasks you want to update.

#### Note

When you adjust the remaining duration for a task, iTTaskX calculates the duration and percent work complete according to the formulas: Duration = Remaining Duration + Actual Duration and Percent Complete = Actual Duration / Duration.



### Update remaining work

If you know that a task will take more or less time than iTaskX has calculated, you can specify the remaining duration.

1. On the ,View' menu, point to ,Current View: <NAME OF CURRENT VIEW>' and select ,Work Table'.
2. In the ,Remaining Work' field, type the remaining durations for the tasks you want to update.

#### Note

When you adjust the remaining work for a task, iTaskX calculates the work and percent work complete using actual work values according to the formulas:  $\text{Work} = \text{Remaining Work} + \text{Actual Work}$  and  $\text{Percent Work Complete} = \text{Actual Work} / \text{Work}$ .

### 2.6.7 Update Total Actual Work for Resource Assignments

To track how much work each resource has performed on a task since the task began, you can enter the total actual work performed by each assigned resource.

1. On the ,View' menu, point to ,Tables' and select ,Work Table'.
2. In the ,Actual Work' field, type the actual work for the resource assignments you want to update.

#### Note

When you specify the actual work for a resource assignment, iTaskX calculates the percentage of work complete and remaining work for the assignment according to the formulas:  $\text{Percent Work Complete} = \text{Actual Work} / \text{Work}$  and  $\text{Remaining Work} = \text{Work} - \text{Actual Work}$ . For each task, iTaskX calculates and displays the sum of the work performed by the individual resources.

### 2.6.8 Check for Tasks that are Behind Schedule

If you have saved a baseline for your project, you can see how tasks progress over time and see whether their start and finish dates are slipping. You can track progress by comparing baseline and scheduled or actual start and finish dates.

1. On the ,View' menu, point to ,Current View' > ,Tracking Gantt' and select ,Variance Table'.

#### Note

If you have saved a baseline, the ,Tracking Gantt' view displays two task bars, one on top of the other, for each task. The lower bar shows baseline start and finish dates and the upper bar shows scheduled start and finish dates so that you can see the difference between your plan and the current schedule.

### 2.6.9 Determine if the Project End Date has Changed

If you have set a baseline for your project, you can view the time difference between the baseline and currently scheduled end date of your project as the project progresses.

1. On the ,Edit' menu, point to ,Project Information...'.
2. Click on the ,Statistics...' button in the ,Item Information' inspector.

#### Note

The ,Variance' row in the ,Finish' field shows the difference between the baseline and current end date of your project.



### 2.6.10 Find Slack in your Schedule

The amount of slack in your schedule tells you how much you can delay tasks before other tasks or the project end date is affected.

1. On the ,View' menu, point to ,Current View' > ,Task Sheet' and select ,Schedule Table'.

#### Notes

If you know where slack exists in your schedule, you can move tasks when certain phases of the schedule have no slack and other phases have too much.

Slack values may also indicate a schedule inconsistency. **For example**, a negative slack value occurs when one task has a ,Finish-to-Start' dependency with a successor task, but the successor task has a ,Must Start On' constraint that is earlier than the end of the first task.

### 2.6.11 Critical Tasks (Path)

#### About critical tasks

By default, iTaskX defines a task as critical if it has zero days of slack. However, you can change this definition and make a task critical if it has, for example, one or two days of slack. Making a task with slack critical can be helpful if you want to be alerted to tasks that are becoming critical when you still have some buffer.

Slack is determined by the early finish and late finish dates of the tasks in your schedule. An early finish date is the earliest date that the task could finish, based on its start date and scheduled duration. A late finish date is the latest date that the task can finish without delaying the project finish. The difference between early finish and late finish dates determines the amount of slack. For critical path tasks (tasks that have no slack), the early finish and late finish dates are identical.

#### Set the slack which defines a task as critical:

1. Press ,F2' or choose ,Tracking Gantt' under ,Current View' of the ,View' menu to open the ,Tracking Gantt' view.
2. Choose ,Project Options...' in the ,Edit' menu.
3. Click on the ,Calculation' tab and enter the new slack value.
4. Press ,OK' to leave the ,Project Options' sheet.

#### Notes

- In the Tracking Gantt view, critical tasks appear in red.
- To change the appearance of tasks, choose ,Bar Styles...' in the ,Format' menu.

#### Shorten the critical path

If you want to bring in the project finish date, you need to bring in the dates of your critical path tasks. This is also known as crashing a project.

#### To do this:

- Shorten the duration or work on a task on the critical path.
- Change a task constraint to allow for more scheduling flexibility.
- Break a critical task into smaller tasks that can be worked on simultaneously by different resources.
- Revise task dependencies to allow more scheduling flexibility.
- Set lead time between dependent tasks where applicable.
- Schedule overtime.
- Assign additional resources to work on critical path tasks.

#### Note

If you bring in the dates of your critical path, a different series of tasks could become the new critical path. There is always one overall critical path for any project schedule. The new critical path would then become the series of tasks you track more closely to ensure the finish date you want.



## 2.7 Working with Costs

### 2.7.1 Enter Pay Rates for Resources

iTaskX calculates costs for resources based on regular and overtime rates or on the per-use cost you enter.

1. On the ,View' menu, point to ,Current View' > ,Resource Sheet' and select ,Entry Table'.
2. Select a resource or type a new resource name and then click the ,Info' toolbar icon.
3. Enter under the ,Resource information' pane in the ,Info' panel the ,Standard Rate', ,Overtime Rate' and ,Per Use Cost'.
4. In the ,Cost accrual' pop-up select a accrual method for resource cost.

#### Notes

- You can also enter the cost values directly in the table of the ,Resource Sheet' view.
- To change the default rates, open ,Edit' > ,Project Options...', click on the ,Calculation' tab and enter your ,Default standard rate' and ,Default overtime rate'.

#### Relevant Toolbar Item



,Info'

To open the Info panel.

### 2.7.2 Enter Costs for Material Resources

You can enter material resource in your project to calculate the cost of your consumable resources and you can set a per-use cost for the materials used.

1. On the ,View' menu, point to ,Current View' > ,Resource Sheet' and select ,Entry Table'.
2. Select a material resource or type a new material resource name and then click the ,Info' toolbar icon.
3. Select in the ,Type' pop-up ,Material'.
4. Enter under ,Costs' the ,Standard Rate' and ,Per Use Cost'.
5. In the ,Cost accrual' pop-up select a accrual method for material cost.

#### Notes

- You can also enter the cost values directly in the table of the ,Resource Sheet' view.
- Enter material resource rates if you want iTaskX to calculate material resource costs based on material resource rates. For example, to assign to a task the material resource cement with a unit price of 50 € per ton, select the resource type ,Material' and enter the resource name cement, the label ton and the standard rate 50 €.
- To change the default currency symbol, open ,Edit' > ,Project Options...', click on the ,Calculation' tab and enter your default ,Currency Symbol'.

#### Relevant Toolbar Item



,Info'

To open the Info panel.

### 2.7.3 Set a Fixed Cost for a Task

1. On the ,View' menu, point to ,Current View' > ,Task Sheet' and select ,Cost Table'.
2. Select a task or type a new task name and then click the ,Info' toolbar icon.
3. Enter under ,Fixed Cost' the fixed cost for the task.
4. In the ,Cost accrual' pop-up select a accrual method for task fixed cost.



### Relevant Toolbar Item



**,Info'**

To open the Info panel.

#### 2.7.4 Set Overtime Costs

By default, iTaskX calculates work required to complete a task using the standard rate of each assigned resource. It does not calculate the cost of additional work hours using the overtime rates you entered until you specify those hours as overtime work.

1. On the ,View' menu, point to ,Current View' > ,Task Usage' and select ,Work Table'.
2. Select the resource assignment for which you want to enter overtime work.
3. In the ,Overtime Work' field, type the amount of overtime work for the resource assignment.
4. To enter overtime work for additional resource assignments, repeat steps 2–3.

#### Note

The amount of overtime work you specify does not get added to the amount of work for the task because work always represents the total amount of work. Overtime work merely represents the portion of the total amount of work that should be considered and rated as overtime. When you enter overtime work, the duration of the task is shortened.

**For example**, if a person is scheduled to work 10 hours on a task, which includes 8 hours of regular work and 2 hours of overtime work, you assign 10 hours of work and designate 2 hours of it as overtime work to the resource, instead of 8 hours of work and 2 hours of overtime work.

#### 2.7.5 View Costs

You can view the cost per task, per resource or per project.

##### View costs per task

1. On the ,View' menu, point to ,Current View' > ,Task Sheet' and select ,Cost Table'.
2. Review the cost fields.

##### View costs per resource

1. On the ,View' menu, point to ,Current View' > ,Resource Sheet' and select ,Cost Table'.
2. Review the cost fields.

##### View project costs

1. Press ,F5' or choose ,Task Sheet' under ,Current View' of the ,View' menu to open the ,Task Sheet' view.
2. On the ,Format' menu, choose ,Current View...'.
3. Under the ,Appearance' tab in the ,Format Information' inspector select ,Show Project Summary' and click ,OK'.
4. On the ,View' menu, point to ,Current View' > ,Task Sheet' and select ,Cost Table'.
5. Review the total costs in the ,Project Summary' row.

#### Note

You can also review project costs quickly in one place. On the ,Edit' menu, choose ,Project Information', and then click ,Statistics...' in the ,Item Information' inspector.



### 2.7.6 View Costs Variances

You can review costs and variance per task, resource, or assignment to see when and where costs are more or less than budgeted.

#### Review task cost variances

1. On the ,View' menu, point to ,Current View' > ,Task Sheet' and select ,Cost Table'.
2. Review available cost values in the ,Baseline Cost', ,Cost Variance', ,Actual Cost' and ,Remaining cost' fields.

#### Review resource cost variances

1. On the ,View' menu, point to ,Current View' > ,Resource Sheet' and select ,Cost Table'.
2. Review available cost values in the ,Cost', ,Base Cost', ,Cost Variance', ,Actual Cost' and ,Remaining Cost' fields.

#### Review assignment cost variances in the ,Resource Usage' view

1. On the ,View' menu, point to ,Current View' > ,Resource Usage' and select ,Cost Table'.
2. In the ,Cost Table' for the ,Resource Usage' view, review available cost values in the ,Cost', ,Baseline Cost', ,Cost Variance', ,Actual Cost' and ,Remaining Cost' fields.

#### Review assignment cost variances in the ,Task Usage' view

1. On the ,View' menu, point to ,Current View' > ,Task Usage' and select ,Cost Table'.
2. In the ,Cost Table' for the ,Task Usage' view, review available cost values in the ,Fixed Cost', ,Cost', ,Baseline Cost', ,Cost Variance', ,Actual Cost' and ,Remaining Cost' fields.



## 2.8 Printing and Export

### 2.8.1 Printing Views

To print a view choose ,Print Preview' in the ,File' menu. If necessary, change options for the type you chose in the pop-up menus under the toolbar. (For example, ,Printer', ,Paper Size', ,Scaling', ,Print Range'...) It's also possible to use the sliders around the preview to set up the page margins. iTTaskX will display any changes on the fly and you can see always what your print-out will look like when it's printed.

To add a footer to the current view, choose ,File' > ,Page Setup...' and select the ,Footer' tab. When you're ready to print choose ,Print...' in the ,File' menu, choose the printer you want to use from the ,Printer' pop-up menu and click on the ,Print' button.

**Notes:** The footer will only appear in the ,Print Preview' and on the print-out. It's also possible to set up different print settings for each view.

#### Hint

,Save View as Image...' in the ,File' menu is only available in the ,Print Preview'.

#### Relevant Toolbar Item



##### ,Preview'

Displays a print preview of the current view.



##### ,Print'

Prints the current view.

### 2.8.2 Export and Exchange Projects

iTTaskX can save documents in the following file formats. Some formats allow you to save all the information from your project and some formats allow you to save only data contained in the iTTaskX fields.

Supported by ,File' > ,Save As...'

- **iTTaskX-Project (.itp)**  
The standard file format which will store all information in your project. The extension is .itp.
- **iTTaskX-Template (.itt)**  
iTTaskX templates can be used for standardizing the use and appearance of iTTaskX files. This format uses the .itt extension. Information in a template can include tasks, resources, custom tables, custom calendars, appearance settings for gantt chars, text styles, views and settings from ,Edit' > ,Project Options...'
- **MS-Project XML (.xml)**  
Extensible Markup Language (XML) is a format for delivering rich, structured data from an application in a standard, consistent way. This format uses the .xml extension. The XML format is the recommended format to interchange project data between iTTaskX and other programs like MS Project 2002 and later versions.



- **MS–Project Data Exchange (.mpx)**

An ASCII format used with project management and various other programs that support MPX 4.0. This format uses the .mpx extension. The MPX format is the recommended format to interchange project data between iTTaskX and older programs like MS Project 4.x and MS Project 98.

**Note**

The MPX format depends on it's language. iTTaskX supports only the export of .mpx files for the English language.

- **Outline Processor Markup Language (.opml)**

OPML is a standard language which is used in many outlining programs. This format uses the .opml extension. This format can be used to interchange data with programs like Omni Outliner.

- **Text (Tab delimited) (.txt)**

Text–only format is a generic text format used by word–processing, spreadsheet like MS Excel (Mac version) and other programs. This format uses the .txt extension and is tab delimited. You can export all task tables or resource tables to this format, but you can't export them together.

- **Text (Comma delimited) (.csv)**

Comma–separated values (CSV) is a generic text format used with word–processing, spreadsheet like MS Excel (Windows version) and other programs. This format uses the .csv extension and is comma delimited. You can export all task tables or resource tables to this format, but you can't export them together.

- **iCal (.ics)**

ICS is a calendar format used by Apples iCal. This format uses the .ics extension. You can export all tasks to this format.

**Supported by ,File' > ,Save as Image...'**

iTTaskX can export PDF documents, EPS files and several types of image files including JPG, TIF and PNG through ,Save View as Image...'

**Note**

,Save View as Image...' in the ,File' menu is only available from the ,Print Preview'.



## 2.9 Spotlight

### 2.9.1 Advanced Spotlight search options

Beside the default Spotlight search options iTaskX offers the following advanced Spotlight search options:

- **iTaskX – Revision**  
The revision number of the project.
- **iTaskX – Manager**  
The manager of the project.
- **iTaskX – Start**  
The date and time that the project is scheduled to begin.
- **iTaskX – Finish**  
The date and time that the project is scheduled to end.
- **iTaskX – Duration**  
The total span of active working time for the project.
- **iTaskX – Actual Duration**  
The span of actual working time for the project so far, based on the scheduled duration and current remaining work or percent complete.
- **iTaskX – Remaining Duration**  
The amount of time required to complete the unfinished portion of the project.
- **iTaskX – Work**  
The total amount of work scheduled to be performed on the tasks of the project by all assigned resources.
- **iTaskX – Actual Work**  
The amount of work that has already been done by the resources assigned to the tasks of the project.
- **iTaskX – Remaining Work**  
The amount of time still required by all assigned resources to complete the tasks of the project.
- **iTaskX – Cost**  
The total scheduled, or projected, cost for the tasks of the project.
- **iTaskX – Actual Cost**  
The costs incurred for work already performed by all resources on the tasks of the project, along with any other recorded costs associated with the tasks.
- **iTaskX – Remaining Cost**  
The remaining scheduled expense of all tasks of the project that will be incurred in completing the remaining scheduled work by all resources assigned to the tasks.
- **iTaskX – % Complete**  
The current status of the project, expressed as the percentage of all task durations that has been completed.
- **iTaskX – % Work Complete**  
The current status of the project, expressed as the percentage of all task work that has been completed.
- **iTaskX – Number of Resources**  
The number of resources in the project.
- **iTaskX – Number of Tasks**  
The number of tasks in the project.
- **iTaskX – Resources**  
The names of all resources in the project.
- **iTaskX – Resource Notes**  
The notes of all resources in the project.
- **iTaskX – Tasks**  
The name of all tasks in the project.
- **iTaskX – Task Notes**  
The notes of all tasks in the project.

#### Note

Spotlight searching is available for Mac OS X 10.4 Tiger and above. More information about Spotlight searching is available in the Mac Help.



## 3.0 Dialogs and Sheets Help

### 3.1 iTaskX

#### 3.1.1 Preferences

Use the 'Preferences' dialog to manage the default settings of iTask.

You can:

- Change the standard behavior of iTask on starting up.
- Change the standard behavior of iTask while creating a new project.
- Specify the settings of the directory- and exchange server.

**Command:** 'iTaskX' > 'Preferences...'

#### 'General' pane

- **Create new project**  
Indicates if iTaskX creates a new project at each startup.
- **Run Projectinfo Panel**  
Indicates if iTask should display the 'Project Information' sheet each time a new project is created.
- **Show iTask Guide**  
Indicates if iTask should display the Guide by default.
- **Standardtemplate**  
Specifies the template that iTaskX should use to create a new project.
- **Search Path for User templates**  
Specifies the paths that iTaskX should use to search for templates.  
Note  
It's recommended to use folders for your templates and do not add a hole volume in your search paths.
- **Show scheduling messages**  
Indicates if iTaskX should display scheduling messages.
- **Use live resize while changing margins**  
Indicates if iTaskX should use live resize while you are changing the margins in the 'Print Preview'.

#### 'LDAP' pane

If you're running a directory server in your network, iTaskX can search this directory server for resources. The settings for the LDAP server should be available from the network administrator.

- **Server**  
Specifies the name or IP-address of the server (for example, ldap.company.com or 192.168.16.2).
- **Search Base**  
Specifies the search base on the directory server (for example, ou=contacts,cn=mycompany,cn=com).
- **Port**  
Specifies the port on which the server is listening. The standard value is 389.
- **Use SSL**  
Indicates if the connection should be encrypted.
- **Scope**  
Specifies how deep the search should be.
- **User name**  
Specifies the user name for authentication.
- **Password**  
Specifies the password for authentication.
- **Auth. Type**  
Specifies the type of authentication that should be used.

#### Note

iTaskX offers only support for LDAP simple bind, which you can't use by default with a Windows 2003 server.



### **„Exchange“ pane**

If you're running an exchange server in your network, iTaskX can search a public folder of the exchange server for resources.

The settings for the exchange server should be available from the network administrator.

- **Server**  
Specifies the name or IP-address of the server (for example, exchange.company.com or 192.168.16.2).
- **Search Base**  
Specifies the search base (folder) on the exchange server (for example, public/contacts/).
- **Port**  
Specifies the port on which the server is listening. The standard value is 80.
- **Use SSL**  
Indicates if the connection should be encrypted.
- **Scope**  
Specifies how deep the search should be.
- **User name**  
Specifies the user name for authentication.
- **Password**  
Specifies the password for authentication.
- **Auth. Type**  
Specifies the type of authentication that should be used.

### **„Updates“ pane**

If you have a connection to the internet, you can configure iTaskX to automatically inform you if there is a new version available.

- **Check for updates**  
Specifies if and how often iTaskX should check for updates.
- **Check for Updates Now**  
Searches for updates immediately.

## **3.1.2 License Information**

Use the **„License Info“** dialog to manage your License information.

You can:

- Edit the name of the registered user.
- Edit the serial key.

**Command:** **„iTaskX“ > „License Informationen...“**

By default iTaskX runs as **„Unregistered Demo“**. You can't save or print documents.

To remove this limitation, click on the **„Buy Licenses...“** button to go to our online store, or visit our website <http://www.itaskx.com> for information how to obtain an evaluation-key.

### **Available Licencetypes**

- **„Single Host“**  
For using on a single computer.
- **„Multiple Hosts 5“**  
For using on 5 computers.
- **„Multiple Hosts 10“**  
For using on 10 computers.
- **„Multiple Hosts 25“**  
For using on 25 computers.
- **„Education“**  
For using on unlimited computers in a educational institution.



## 3.2 File

### 3.2.1 Open

Use the **File Open** sheet to open a project file.

You can:

- Select the file name.
- Select the format of the file.

**Command:** **File** > **Open...**

iTaskX can open documents in the following file formats:

- **iTaskX-Project (.itp)**  
The standard file format which will store all information in your project.
- **iTaskX-Template (.itt)**  
iTaskX templates can be used for standardizing the use and appearance of iTaskX projects.
- **eTask 1 (.naa)**  
The file format of eTask the predecessor of iTaskX.
- **MS-Project XML (.xml)**  
Extensible Markup Language (XML) is a format for delivering rich, structured data in a standardized, consistent way. The XML format is the recommended format to interchange data between iTaskX and other programs like Microsoft Project 2002 and later versions.
- **MS-Project MPP (.mpp)**  
The native format from Microsoft Project.
- **MS-Project Data Exchange (.mpx)**  
The former data exchange format from Microsoft Project. Microsoft does not recommend this format anymore because the data is stored localized. At this time iTaskX supports 3 languages (English, German and French). Microsoft Project and various other programs support this format.
- **Outline Processor Markup Language (.opml)**  
OPML is a standardized XML based file format to describe outline data. This format can be used to interchange data with programs like Omni Outliner and MindMap.
- **Text (Tab delimited) (.txt)**  
This text format can be produced by many programs. This format uses the tabulator character as field separator. You can use this format to import data from programs like spreadsheets and databases.
- **Text (Comma delimited) (.csv)**  
Comma-separated-values (CSV) is a text format mainly used under Microsoft Windows. It uses a single character as the field separator. The standard separator is a comma ,, or a semi colon ;. You can use this format to import data from programs like spreadsheets and databases.
- **iCal (.ics)**  
ICS is a calendar format used by Apples iCal to export calendars. You can use this format to import the appointments as tasks in iTaskX.

### 3.2.2 Save as

Use the **Save as** sheet to save your projects.

You can:

- Enter the file name.
- Enter the file format.

**Command:** **File** > **Save as...**



iTaskX supports following file formats:

- **iTaskX-Project (.itp)**  
The standard file format of iTaskX which stores all information in your project.
- **iTaskX-Template (.itt)**  
iTaskX templates can be used for standardizing the use and appearance of iTaskX projects. Please make shure there are no progress information entered, before saving the project as template.
- **MS-Project XML (.xml)**  
The Extensible Markup Language (XML) is a format for delivering rich, structured data from an application in a standardized, consistent way. The XML format is the recommended format to interchange data between iTaskX and other programs like MS Project 2002 and later versions.
- **MS-Project Data Exchange (.mpx)**  
The former data exchange format from Microsoft Project. Microsoft does not recommend this format anymore because the data is stored localized. iTaskX saves the data in english or german language. Microsoft Project and various other programs support this format.
- **Outline Processor Markup Language (.opml)**  
OPML is a standardized XML based file format to describe outline data. This format can be used to interchange data with programs like Omni Outliner and MindMap.
- **Text (Tab delimited) (.txt)**  
This text format can be produced by many programs. This format uses the tabulator character as field separator. You can use this format to import iTaskX data in programs like spreadsheets and databases.
- **Text (Comma delimited) (.csv)**  
Comma-separated-values (CSV) is a text format manly used under Microsft Windows. It uses a single charactor as the field separator. The standard separator is a comma ,, ' or a semi collon ,, '. You can use this format to import iTaskX data in programs like spreadsheets and databases.
- **iCal (.ics)**  
ICS is a calendar format used by Apples iCal to export calendars. You can use this format to import iTaskX tasks as appointments in iCal.

### 3.2.3 Save View as Image

Use the ‚Save View as Image‘ to save the current view as image.

You can:

- Enter the file name.
- Specify the file format.
- Specify the export range.

**Command:** Switch to the ‚Print Preview‘, then choose ‚File‘ > ‚Save View as Image...‘

iTaskX supports following file formats:

- EPS
- JPG
- PDF
- PNG
- TIF

#### Note

‚Save View as Image...‘ is only available in the ‚Print Preview‘.

#### Hint

Some formats will offer additional features like ‚Compression‘.



### 3.2.4 Page Setup (Footer)

Use the **Page Setup** sheet to customize page settings, and the footer for the current view.

**Command:** **File** > **Page Setup**.

#### **Page Setup** tab

Use the options on this tab to change the page settings of the current view. You can adjust the page size, orientation, margins and scale of the page.

#### **Note**

All settings will only effect the current view. Each view has its own settings!

#### **Footer** tab

To make your printouts look more professional and useful, you can add a page footer (excluding the calendar view). The footer appears at the bottom of the last printed page. A footer typically contains information like the project name, company name pagenumber...

#### **Text** tab

Type and format any text you want. You can also use the fields from the **Fields** pop-up.

**For example**, **%Systemdate** – iTaskX will replace **%Systemdate** with the current system date. All available fields are listed in the **Fields** pop-up. You can also combine fields and any other text you want.

#### **For example:**

**%Company**

**Project: %Title**

**Revision: %Revision from %Last Saved**

**Any text you want...**

#### **Logo** tab

Drag or insert a logo if you want to display it on the left side of the footer.

#### **Notes**

- You can preview your settings by switching the view to the **Print Preview**
- (**File** > **Print Preview**).
- All settings will only effect the current view. Each view has its own settings!

## 3.3 Edit

### 3.3.1 Task Information

Use the ,Task information' pane of the ,Item Information' inspector to enter, review or change information about the selected task(s).

You can:

- Enter or change task information.

**Command:** Switch to a view that lists tasks, then choose ,View' > ,Inspectors' > ,Item Information'



- **Name**  
Specifies the name of the task.
- **Duration**  
Specifies the amount of time needed to complete the selected task. You can enter duration in minutes, hours, days, weeks, or months. To enter an estimated duration, type a question mark after the duration unit, or select the **Estimated** check box.  
You can change the default estimated duration settings for all future tasks in the current project. On the ,Edit' menu, click ,Project Options...', and then click the ,Schedule' tab. If you prefer not to use the question mark for estimated durations, clear the **Show that tasks have estimated durations** check box. If you prefer that new tasks do not have estimated durations by default, clear the **New tasks have estimated durations** check box.
- **Start**  
Specifies the task's scheduled start date. If the task has a predecessor, iTTaskX calculates the start date. If you enter a start date for a task, iTTaskX sets a moderately flexible constraint, such as ,Start No Earlier Than', on the task.
- **Finish**  
Specifies the task's scheduled finish date. If you specify a start date and duration, iTTaskX calculates the finish date. If you enter a finish date for a task, iTTaskX sets a moderately flexible constraint, such as ,Finish No Earlier Than' on the task.
- **Mark task as milestone**  
Specifies that the task is a milestone. You could also mark a task as a milestone by entering 0 in the ,Duration' field.
- **Hide bar**  
Hides the graphical representation for the selected task.
- **Show child tasks**  
Displays all child tasks in the summary row, when the summary is collapsed.
- **Constraint**  
Restricts the allowable start or finish date for the task. You can assign one constraint per task. If you specify a constraint other than ,As Soon As Possible' or ,As Late As Possible', enter the appropriate date in the ,Date' field.
- **Date**  
Specifies the date associated with a moderate or inflexible constraint selected in the ,Constraint' field. All constraints except ,As Late As Possible' and ,As Soon As Possible' require a date.
- **Task type**  
Specifies the effect that a change to work, assignment units, or duration has on the calculation of the other two fields for this task. Unless you specify a different default task type on the ,Schedule' tab of the ,Project Options' sheet, the default task type is ,Fixed Units'.
- **Effort driven**  
Specifies that iTTaskX keep the total task work at its current value. The duration of a task shortens or lengthens as resources are added or removed from a task that is effort driven while the amount of effort necessary to complete a task remains unchanged. By default, this check box is selected when ,Fixed Duration' or ,Fixed Units' is the selected task type.

**Note:** You can set the default task type for all new tasks on the Schedule tab of the ,Project Options' sheet.

- **Calendar**  
Specifies a calendar for the selected task. By default, tasks are scheduled based on the working time of the project calendar, as set in the ,Item Information' inspector. Tasks are also scheduled based on the working time of assigned resources. You can choose from the base calendars that come with iTaskX, as well as any new base calendars you have created. You can create your own calendars by clicking the ,Plus' button in the ,Change Working Time' sheet (,Edit' > ,Working Time...').
- **Ignore resource calendar**  
Specifies that iTaskX use only the task calendar to schedule the selected tasks and not resource calendars. This option is available only if a task calendar is specified in the ,Calendar' field.
- **Fixed Cost**  
Specifies any nonresource task expense.
- **Cost accrual**  
Specifies when fixed cost for that task will be incurred.
- **% Complete**  
Specifies how much of the task has been completed. Enter a number between 0 and 100 that indicates the percentage of actual progress on the task. Based on this value, iTaskX calculates the task actual and remaining duration

### 3.3.2 Resource Information

Use the ,Resource information' pane in the ,Item Information' inspector to enter, review or change information about the selected resource(s).

You can:

- Enter or change resource information.

**Command:** Switch to the view ,Resource Sheet', then choose ,View' > ,Inspectors' > ,Item Information'



- **Name**  
Indicates the name of the selected resource (must be unique within the project).
- **Initials**  
Indicates the resources initials or other abbreviation that identifies the resource.
- **Email**  
Indicates the email address of the selected resource. This field is available only if the type of the resource is set to ,Work'.
- **Code**  
Specifies a code for the resource, such as a cost center code.
- **Type**  
Specifies whether the resource is a work resource or a material resource.  
**Work:** Work resources are people, equipment, or facilities that are assigned to a task and are not consumed during the task.  
**Material:** Material resources are consumable resources, such as steel, that you want to track.
- **Material label**  
Specifies the label for the unit of a material resource. For example, for cement, you can enter Yard, to track yards of cement for the project. This field is available only if the type of the resource is set to ,Material'.
- **Max. Units**  
Specifies the maximum units available for this resource. These settings, together with the resource's calendar, determine how much work a resource can do without being overallocated. You can also specify part-time availability with maximum units. For example, if you have a

resource who is available to your project two days a week, you can enter the maximum units as 40 percent. You can enter maximum units as a percentage (50 %, 100 %, 300 %). This field is available only if the type of the resource is set to ,Work‘.

- **Calendar**  
Specifies the calendar that defines the working hours of the resource. This field is available only if the type of the resource is set to ,Work‘.
- **Standard Rate**  
Specifies the hourly rate to be accrued for regular work, or straight time, for this resource.
- **Overtime Rate**  
Specifies the hourly rate to be accrued for overtime work for this resource.
- **Per Use Cost**  
Specifies costs to be accrued whenever this resource is used, regardless of the amount of work done.
- **Cost accrual**  
Specifies when standard and overtime costs for resources will be incurred. Per-use costs are always accrued at the start of a task.

### 3.3.3 Assignment Information

Use the ,Assignment information‘ pane in the ,Item Information‘ inspector to enter, review or change information about the selected assignment(s).

You can:

- Enter or change assignment information.

**Command:** Switch to the view ,Task Usage‘ or ,Resource Usage‘, then choose ,View‘ > ,Inspectors‘ > ,Item Information‘



- **Resource**  
Indicates the resource of the assignment.  
Select the resource in the list or type the beginning of the name and iTaskX will complete the name if it can be found. If the name could not be found iTaskX adds the resource automatically to the project (as a resource of type ,Work‘).
- **Work**  
Defines the total amount of work scheduled, or entered, to be performed by a resource on a task.  
iTaskX normally calculates total assignment work based on the assignment span and the assignment units for the assigned resource. Work includes actual work and remaining work, as well as overtime work.  
Edit the Work field for an assignment when you want to change the amount of time a resource works on a task.  
Enter work as number followed by ,m‘ for minutes, ,h‘ for hours, ,d‘ for days, ,w‘ for weeks or ,mo‘ for months. If you do not enter any units iTaskX will use the default settings entered in the ,Project Options‘ sheet.
- **Actual work**  
Indicates the amount of work that has already been done by a resource on a task.
- **Remaining work**  
Indicates the amount of time required by a resource assigned to a task to complete an assignment.
- **% Work complete**  
Indicates the current status of the assignment, expressed as the percentage of the assignment’s work that has been completed.
- **Actual overtime work**  
Indicates the actual amount of overtime work already performed by a resource on an assigned task.

- **Remaining overtime work**  
Indicates the amount of overtime work that remains on an assignment.
- **Cost**  
Shows the total scheduled (or projected) cost for an assignment based on costs already incurred for work performed by the resource on a task, in addition to the costs planned for the remaining work for the assignment.
- **Overtime cost**  
Shows the total overtime cost for a resource assignment.
- **Actual cost**  
Displays the cost incurred for work already performed by a resource on a task.
- **Actual overtime cost**  
Displays the cost incurred for overtime work already performed by a resource on a task.

### 3.3.4 Project Information

Use the 'Project information' pane of the 'Item Information' inspector to enter, review, or change information for the current project.

You can:

- Edit the project start date.
- Change the project calendar.
- Enter general information.

Command: 'Edit' > 'Project Information...'



- **Start date**  
Specifies the start date of the project.
- **Finish date**  
Shows the scheduled finish date of the project.
- **Current date**  
Specifies the date that iTTaskX should use as the current date.
- **Calendar**  
Specifies the calendar that iTTaskX should use to do the calculation of task dates.
- **Budget**  
Specifies the planned project budget. iTTaskX displays a warning in the left lower corner of the application window when the budget is passed over.
- **Title**  
Specifies the title of the project.
- **Subject**  
Specifies the subject of the project.
- **Author**  
Specifies the author of the project.
- **Manager**  
Specifies the responsible person of the project.
- **Company**  
Specifies the company that have created the project.
- **Statistics...**  
Displays summary information about the project.



### 3.3.5 Project Options

Use the **‘Project Options’** sheet to enter, review, or change preferences controlling the general operation of iTTaskX.

You can:

- Specify general schedule options.
- Change the calculation preferences.
- Change the calendar preferences.

**Command:** **‘Edit’ > ‘Project Options....’**

All settings in this sheet affect only the current project and are also saved with the project.

#### **‘Schedule’ tab**

- **New tasks**

Specifies the default start date for new tasks as they are entered in the current project. Select **‘Start on Project Start Date’** to start new tasks on the project start date as specified in the **‘Item Information’** inspector. This is the default setting. iTTaskX sets an **‘As Soon As Possible’** constraint on these tasks. If you choose **‘Start on Current Date’**, a **‘Start No Earlier Than’** constraint is set for new tasks using today’s date.

- **Default task type**

Specifies the default task type for any new tasks. The task type determines how iTTaskX recalculates the three related fields (Work, Duration, and Units) when one of them is edited. Tasks can require a fixed amount of time to complete (Fixed Duration), a specific amount of resources to complete (Fixed Units), or a set amount of work to be done (Fixed Work). The default setting is **‘Fixed Units’**.

- **Duration is entered in**

Specifies the unit of time (minutes, hours, days, weeks, or months) used by default in the Duration field. iTTaskX uses this time unit if you do not enter a time unit when you first type a value in the Duration field in the current project. Time units for previously entered durations do not change. The default setting is Days.

- **Work is entered in**

Specifies the default unit of time (minutes, hours, days, weeks, or months) used in the Work field in the current project. iTTaskX uses this time unit whenever it displays work values, regardless of the unit used to enter the work. The default setting is Hours.

- **Show scheduling messages**

Displays messages about schedule inconsistencies, such as a successor task starting before the finish of the predecessor task. By default, this check box is selected.

- **New tasks are effort driven**

Specifies that new tasks are scheduled such that the work on the task remains constant as you add or remove assignments. Assigning additional resources to a fixed-units effort-driven task, for example, shortens the task duration while removing resources lengthens it. If this check box is cleared, adding or removing resource assignments on a fixed-units task has no effect on task duration. By default, this check box is selected.

- **Show that tasks have estimated durations**

Displays a question mark (?) after the duration unit of any task with an estimated duration. By default, this check box is selected.

- **New tasks have estimated durations**

Specifies that all new tasks have estimated durations.

#### **‘Calculation’ tab**

- **Default fixed costs accrual**

Specifies how iTTaskX sets the fixed cost accrual for new tasks. Fixed costs can be accrued at the start of a task, prorated throughout the duration of the task, or accrued at the end of a task. The default setting for this topic is Prorated.

- **Tasks are critical if slack <= X days’**

Specifies the number of days of slack iTTaskX uses to determine critical tasks. If the number of slack days for a task is less than or equal to the number you specify here, the task is considered critical. By default, critical tasks are defined as those having a slack of 0 days.



- **Default standard rate**  
Specifies the standard pay rate for new resources. The default setting is \$0/h.
- **Default overtime rate**  
Specifies the overtime pay rate for new resources. The default setting is \$0/h.
- **Currency symbol**  
Specifies the currency symbol. The default setting is determined from the system preferences.

,Calendar' tab

- **Default start time**  
Specifies the start time that iTaskX assigns to tasks by default when you enter a start date without specifying a time. Time is used with dates even if the date format does not display time. If you enter a start date for a task, such as 8/15/2004, but do not enter a start time, and if the project calendar or task calendar does not dictate another start time, then iTaskX uses the default start time entered in this field. This is most useful when entering constraints and actual start and finish dates. For example, unless you explicitly specify the start time, a ,Must Start On' time will be the start time set in this field. The default setting is 8:00 A.M.
- **Default end time**  
Specifies the finish time that iTaskX assigns to tasks by default when you enter a finish date without specifying a time. Time is used with dates even if the date format does not display time. If you enter a finish date for a task, such as 8/15/2004, but do not enter a finish time, and if the project calendar or task calendar does not dictate another finish time, then iTaskX uses the default finish time entered in this field. This is most useful when entering constraints and actual start and finish dates. For example, unless you explicitly specify the finish time, a ,Must Finish On' time will be the end time set in this field. The default setting is 5:00 P.M.
- **Hours per day**  
Defines the number of hours that you want iTaskX to assign to a task when you enter a duration of one day. For example, by default iTaskX assumes that you want a duration of one day to equal 8 hours. If you enter a duration of two days for a task with the default settings, iTaskX would assume a duration of 16 hours. If you change the number of hours per day on this tab, it's a good idea to update the project calendar to match. The default setting is 8.00.
- **Hours per week**  
Specifies the number of hours that you want iTaskX to assign to a task when you enter a duration of one week. For example, by default iTaskX assumes that you want a duration of 1 week to equal 40 hours. If you enter a duration of 2 weeks for a task with the default settings, iTaskX would assume a duration of 80 hours. If you change the number of hours per week on this tab, it's a good idea to update the project calendar to match. The default setting is 40.00.
- **Hours per month**  
Defines the number of days that you want iTaskX to assign to a task when you enter a duration of a month. For example, by default iTaskX assumes that you want a duration of one month to equal 20 days. If you enter a duration of two months for a task, with the default settings, iTaskX assumes a duration of 40 days. This setting also works with the hours per day setting. For example, if a month is equal to 20 days and a day is equal to 8 hours, then iTaskX assumes that a task that requires two months to complete has a duration of 320 hours. The default setting is 20.

#### Note

The ,Restore Defaults' button will restore the default settings for all tabs.



### 3.3.6 Working Times

Use the **Working Times** sheet to create and edit base calendar and resource calendars.

You can:

- Review and change the working days and times.
- Create new base calendar that you can use as task- and resource calendar.

**Command:** **Edit** > **Working Times...**

iTaskX provides two calendar templates on which you can base your project's calendar.

#### Hint

In iTaskX, by default each task and resource uses the project calendar until you specify a different one. You can create as many calendars as you want to accomplish your needs.

**To edit a calendar follow these instructions:**

- **Select the calendar you want to edit**  
Select the calendar in the pop-up menu or create a new one by clicking on the **Plus** button.
- **Select the date(s) you want to edit**  
To select a date in the current month, click the date in the calendar.

To select a date in a different month (or different year), use the scroll arrows to move to the month, and then click the date.

To select multiple adjacent days in one week, drag across the days. Or click the first day, hold down the **SHIFT** key, and then click the last day. All days between the first and last are selected.

To select multiple nonadjacent days in one month, click the first day, hold down the **COMMAND** key, and then click all the other days in the month that you want to change in the same way.

To select the same day throughout the project, click the column heading for the day of the week. For example, click **M** to select every Monday.

- **Set selected date(s) to**  
**Use default:** Restores the selected working and non-working days you selected to be working (Monday through Friday) or non-working (Saturday and Sunday).  
**Non-working time:** Sets the selected days as non-working days.  
**Non-default working time:** Sets the selected days as working days. Specify the working time with the fields **From** and **To**.

You can also import iCal files (.ics) to define non-working days.

#### Note

For more information about calendars please select **Browse iTaskX Help** from the **iTaskX Main Topics** pop-up menu in the upper left corner and then click **Working with Calendars** in the topic list.



### 3.3.7 Text Field Mappings

Use the **Text Field Mappings** sheet to manage your field mappings you may have saved with the **Text Export Wizard**.

You can:

- Rename a map.
- Delete a map.

**Command:** **Edit > Text Field Mappings...**

To rename a map, double-click the map and enter the new name.

To delete a map, select the map you want to delete and press the **DELETE** key on the keyboard.

#### **Note**

All field mappings are stored on your local machine (`~/Library/Application Support/iTaskX/Fieldmappings`) and also available in other iTTaskX documents for the current user.



## 3.4 Insert

### 3.4.1 Search in Address Book

Use the **‚Search in Address Book‘** sheet to import Resources from the address book.

**Command:** **‚Insert‘ > ‚New Resource from‘ > ‚Address Book...‘**

In the search field type the name of the resource you want to find. iTaskX displays the number of matching resources found. Select the resource you want and click the **‚Add selected Resources‘** button. It’s also possible to select multiple resources. Repeat for each resource(s) you want to find. After you added all resources click the **‚Close‘** button to close the sheet.

The type of the added resource is set to **‚Work‘**.

In the **‚Max. Units‘** field of the resource, enter the number of total units that this resource is available. **‚Max. Units‘** specifies how much this resource is available for this project, for example, part-time or multiples.

**For example**, if you have a resource that is available to your project two days a week, you can enter maximum units as 40%. You can use maximum units to specify multiple availability of a resource designation.

**For example**, suppose you have a resource named Engineers, representing three individual engineers on your team. You can enter the maximum units for Engineers as 300%. You can schedule all three engineers for full-time work at one time without the Engineers resource being over allocated.

You enter maximum units as a percentage (50%, 100% or 300%).

If necessary enter additional information for each resource.

#### **Hint**

The pop-up menu in the search field allows you to switch between **‚Address Book‘**, **‚Directory Server‘** and **‚Exchange Public Folders‘** without leaving the sheet.

#### **Note**

Before you can search a **‚Directory Server‘** or **‚Exchange Public Folders‘** you have to configure the servers under **‚Preferences...‘** in the **‚iTaskX‘** menu.

### 3.4.2 Search in Directory Server

Use the **‚Search in Directory Server‘** sheet to import Resources from a directory server.

**Command:** **‚Insert‘ > ‚New Resource from‘ > ‚Directory Server...‘**

In the search field type the name of the resource you want to find. iTaskX displays the number of matching resources found. Select the resource you want and click the **‚Add selected Resources‘** button. It’s also possible to select multiple resources. Repeat for each resource(s) you want to find. After you added all resources click the **‚Close‘** button to close the sheet.

The type of the added resource is set to **‚Work‘**.

In the **‚Max. Units‘** field of the resource, enter the number of total units that this resource is available. **‚Max. Units‘** specifies how much this resource is available for this project, for example, part-time or multiples.

**For example**, if you have a resource that is available to your project two days a week, you can enter maximum units as 40%. You can use maximum units to specify multiple availability of a resource designation.

**For example**, suppose you have a resource named Engineers, representing three individual engineers on your team. You can enter the maximum units for Engineers as 300%. You can schedule all three engineers for full-time work at one time without the Engineers resource being over allocated.



You enter maximum units as a percentage (50%, 100% or 300%).  
If necessary enter additional information for each resource.

**Hint**

The pop-up menu in the search field allows you to switch between ,Address Book', ,Directory Server' and ,Exchange Public Folders' without leaving the sheet.

**Note**

Before you can search a ,Directory Server' or ,Exchange Public Folders' you have to configure the servers under ,Preferences...' in the ,iTaskX' menu

### 3.4.3 Search in Exchange Public Folder

Use the ,Search in Exchange Public Folder' sheet to import Resources from an exchange server.

**Command:** ,Insert' > ,New Resource from' > ,Exchange Public Folder...'

In the search field type the name of the resource you want to find. iTaskX displays the number of matching resources found. Select the resource you want and click the ,Add selected Resources' button. It's also possible to select multiple resources. Repeat for each resource(s) you want to find. After you added all resources click the ,Close' button to close the sheet.

The type of the added resource is set to ,Work'.

In the ,Max. Units' field of the resource, enter the number of total units that this resource is available. ,Max. Units' specifies how much this resource is available for this project, for example, part-time or multiples.

**For example**, if you have a resource that is available to your project two days a week, you can enter maximum units as 40%. You can use maximum units to specify multiple availability of a resource designation.

**For example**, suppose you have a resource named Engineers, representing three individual engineers on your team. You can enter the maximum units for Engineers as 300%. You can schedule all three engineers for full-time work at one time without the Engineers resource being over allocated.

You enter maximum units as a percentage (50%, 100% or 300%).  
If necessary enter additional information for each resource.

**Hint**

The pop-up menu in the search field allows you to switch between ,Address Book', ,Directory Server' and ,Exchange Public Folders' without leaving the sheet.

**Note**

Before you can search a ,Directory Server' or ,Exchange Public Folders' you have to configure the servers under ,Preferences...' in the ,iTaskX' menu.



## 3.5 Tracking

### 3.5.1 Update Task

Use the ,Update Task' sheet to update progress on the selected task.

You can:

- Set the percentage of completion for selected tasks.
- Enter actual and remaining durations for selected tasks.
- Enter actual start and finish dates for selected tasks.

**Command:** ,Tracking' > ,Update Task...'

- **Duration**  
Shows the duration of the task.
- **% Complete**  
Specifies the percentage of the task that is complete. If you type a percentage and there is no date in the Actual Start Date field, iTaskX sets the actual start date for the task to match the scheduled start date. If you type 100, iTaskX also adjusts the actual finish date for the task to the scheduled finish date.
- **Aktual duration**  
Specifies the actual amount of time it took to complete the task. If the task is complete, type the number of days or hours the task took to complete. If the task is not yet complete, type the number of days or hours worked on the task in the ,Actual duration' field, and if necessary, type the remaining duration in the ,Remaining duration' field. iTaskX updates the scheduled duration and remaining duration to match the actual duration that you enter.
- **Remaining duration**  
Specifies the remaining duration of the task. This number is the amount of time needed to complete the task in progress. If you type an actual duration and a remaining duration, iTaskX changes the scheduled duration to the sum of the actual and remaining duration.
- **Actual Start**  
Specifies the actual start date for the task. For now in iTaskX, actual start is the same as the scheduled start. If you want to compare the planed start with the actual start, do not forget to save a baseline before you enter actual progress.
- **Actual Finish**  
Specifies the actual finish date for the task. For now in iTaskX, actual finish is the same as the scheduled finish. If you want to compare the planned finish with the actual finish, do not forget to save a baseline before you enter actual progress.
- **Scheduled Start**  
Shows the scheduled start of the task.
- **Scheduled Finish**  
Shows the scheduled finish of the task.

#### Notes

**If the task has been completed, use one of these methods to update the task information:**

- Enter the actual start date and finish date.
- Enter 100% in the ,% Complete' field if the task was completed as scheduled.
- Enter the actual duration of the task.

**If the task has been started as scheduled, but not completed, use one of the following methods to update the task information:**

- Enter the actual start date and the expected actual duration.
- Enter the actual start date and the percentage completed so far.
- Enter the actual start date, the actual duration so far, and the remaining duration needed to complete the task.

Use the ,Update Task' sheet for detailed tracking of tasks. For quicker, broader tracking when detailed tracking isn't necessary, use the ,Update Project' sheet.



### 3.5.2 Update Project

Use the ,Update Project' sheet to update tasks' percentage of completion or to reschedule uncompleted work for selected or all tasks in the project.

You can:

- Reschedule uncompleted work to start after a date you specify.
- Update or reschedule work for either the entire project or for selected tasks.

**Command:** ,Tracking' > ,Update Project...'

- **Update work as complete through**

Select to update the work that has actually occurred, according to how the project was scheduled. Enter the date you're updating the schedule to. With this option, iTaskX calculates the progress information of the tasks.

- **Reschedule uncompleted work to start after**

Select to have iTaskX reschedule all uncompleted work to begin on the new start date that you enter in the date field.

If a task has not started by the specified date, the task will be rescheduled, setting the

scheduled start date to your specified date and applying the ,Start No Earlier Than' constraint.

If the task is in progress but behind schedule, iTaskX schedules the remaining duration to start on your specified date (splits the task).

#### **Note**

Use the ,Update Project' sheet to generally track and update groups of tasks. The options in that sheet are most useful if you want to track tasks but do not need to do so in detail. If you need to track tasks in detail, use the ,Update Task' sheet.



## 3.6 Format

### 3.6.1 Text Styles

Use the **Format Text Styles** sheet to customize the appearance of the various task types.

You can:

- Change the appearance of a task type, like font, size and color.

**Command:** **Format** > **Text Styles...**

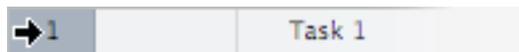
Select the task type(s) you want to edit, and then press the **Choose Font** button to bring up the Font panel.

- **Change existing styles**  
Removes the format from rows you may have formatted individually.
- **Alter the font family of bar styles**  
Alters the font family of the bar text.

#### Note

All settings will only affect the current view. You can format each view individually!

To format a single row instead of all, select the row like in the following picture.



Now choose **Format** > **Font** > **Show Fonts** or press **COMMAND**-'T' to bring up the Font panel. It's only possible to change the font or font styles for the whole row!

### 3.6.2 Bar Styles

Use the **Format Bar Styles** sheet to change the appearance of the bar for the various task types.

You can:

- Change the look of the bar for a task type, including type, color, shape, start shape and color, and end shape and color.
- Change the information and position of text displayed besides or on the bar for a task type.

**Command:** **Format** > **Bar Styles...**

**Change the appearance of the bar for the selected task type**

- **Start section**  
**Shape** Indicates the shape of the symbol at the beginning of the selected bar. Click the arrow to change the beginning shape. If you want no symbol at the beginning of the bar, select the first option (empty).  
**Type** Indicates the border style of the shape to be displayed at the beginning of the selected bar. Click the arrow to change the type. You can select **Solid** or **Framed**.  
**Color** Indicates the color of the shape at the beginning of the selected bar. Click on the color field to change the color of the beginning shape.
- **Middle section**  
**Shape** Indicates the shape of the selected bar. Click the arrow to change the bar shape. If you want no visible bar shape, click the first option (empty).  
**Type** Indicates the border style of the selected bar. Click the arrow to change the type. You can select **Solid** or **Framed**.  
**Color** Indicates the color of the selected bar. Click on the color field to change the bar's color.



• **End section**

**,Shape'** Indicates the shape of the symbol at the end of the selected bar. Click the arrow to add or change the end shape. If you want no symbol at the end of the bar, click the first option (empty).

**,Type'** Indicates the border style of the shape at the end of the selected bar. Click the arrow to change the type. You can select **,Solid'** or **,Framed'**.

**,Color'** Indicates the color of the shape at the end of the selected bar. Click on the color field to change the color of the end shape.

• **Shadow section**

If you like to add a shadow to the selected bar, activate the **,Shadow'** check box. Use the sliders beside the **,Shadow'** check box to adjust opacity, blur, offset and angle.

**Customize the displayed text for the selected task type**

**,Left', ,Right', ,Top', ,Bottom', or ,Inside'** Enter the text or the name of a field whose contents will appear in position beside or on the bar. To add or change the text to be displayed for the selected bar, click in the field representing the position you want for the text (**for example**, Left), click on the arrow on the end of the text field, and then select the an entry from the pop-up (for example, **,Start'** – iTaskX will replace **,Start'** with the start date and time of the task). All available task fields are listed. You can also combine fields with any other text. **For example**, Start;-;Task Name;-;Finish;Any Text (Note: All parts of the format string must be separated with a semicolon **,;**).

- If you add text to the top or bottom of the Gantt bar, the row height for the corresponding task sheet increases to accommodate the additional space needed. You control the height of the bars with the Font size.
- To remove text from a Gantt bar, click in the field, and then press **,DELETE'** on your keyboard to clear the field name.

**Notes**

- If you like to change all existing bar styles in your Gantt Chart, activate the **,Change existing styles'** check box.
- To remove text from a Gantt bar, click in the field, and then press **,DELETE'** on your keyboard to clear the field name.

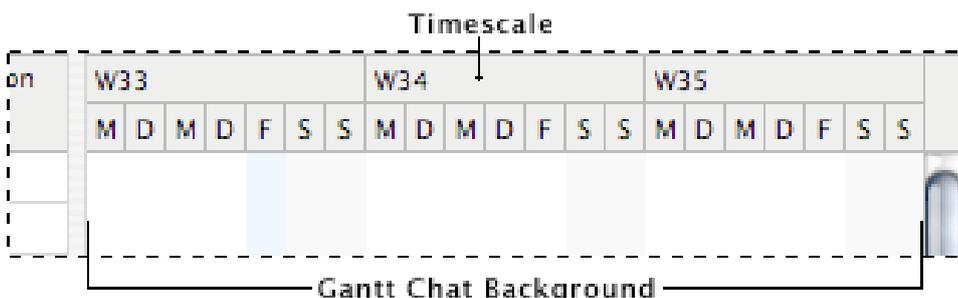
**3.6.3 Format Timescale**

Use the **,Format Timescale'** sheet to to specify options for the number of tiers to display in a view's timescale, the units in the timescale, and how non-working time is shown on the timescale.

You can:

- Specify the calendar for which the working and non-working times are shown.
- Specify if and how non-working times are shown.
- Change the appearance of the timescale.

Command: Switch to a view with a timescale (for example, Gantt View), and than choose **,Format' > ,Timescale...'** or use the pop-up menu of the timescale.





The timescale can display a maximum of three tiers, which units must be in ascending order (for example, Month, Weeks, Days).

- **Non-working time**  
Indicates if non-working time should be displayed as part of the timescale.
- **Calendar to use**  
Specifies the calendar that is to dictate working time and non-working time in the view.
- **Color**  
Specifies a color for non-working time.
- **Timeline**  
Specifies the number of tiers that should be shown.
- **Scale**  
Specifies the scale factor to display the timescale.
- **Count**  
Specifies the interval between unit labels on the timescale tier. For example, if the unit is weeks, and you type 2, the scale will be separated into two-week segments. The default is 1.
- **Unit**  
Specifies the time unit for the timescale tier. Days is the default time unit for the bottom tier, Weeks for the middle tier and Months for the top tier.
- **Label**  
Specifies a date format for the timescale tier.
- **Align**  
Specifies the text alignment of the label on the timescale tier.

#### Hint

Holding down the ,CTRL' key while clicking on the timescale brings up a shortcut menu which list the commands you can use on the timescale. iTTaskX has several shortcut menus. Using shortcut menus saves time and makes it easier to work with iTTaskX.

#### 3.6.4 Format View

Use the ,View' pane in the ,Format Information' inspector to customize the appearance for the current view.

Command: ,Format' > ,Current View' or use the context menu of the view.



- **General**
  - Show Project Summary**  
Indicates if iTTaskX should display the project summary task. This task has the Number 0. This option is saved with your project.
- **Document Color**  
Indicates the document color of the current view. Click on the color button to set the document color or press the ,Restore Color' button to restore the document color to its default setting.
- **Grid Color**  
Indicates the grid color of the current view. Click on the color button to set the grid color or press the ,Restore Color' button to restore the grid color to its default setting.
- **Table**
  - Show Time in Date-Time Fields:** Indicates if the time information of date-time fields like ,Start' or ,Finish' should be displayed.
  - Show Vertical Gridlines:** Indicates if vertical gridlines are displayed in the table view.
  - Show Horizontal Gridlines:** Indicates if horizontal gridlines are displayed in the table view.
- **Gantt Chart**
  - Show Vertical Gridlines:** Indicates if vertical gridlines are displayed in the gantt view.
  - Show Horizontal Gridlines:** Indicates if horizontal gridlines are displayed in the gantt view.

**Notes**

- Not all options are available for each view.
- All settings will only effect the current view. Each view has its own settings!

**3.6.5 Format Bar**

Use the ,Bar‘ pane in the ,Format Information‘ inspector to customize the appearance of an individual bar.

You can:

- Specify the shape, type, and color of the symbol that appears at the beginning and end of the selected bar.
- Specify the shape, type, and color of the selected bar itself.
- Specify the type, position and format of information that should be displayed for the bar.

**Command:** ,Format‘ > ,Bar...‘

**Change the appearance of an individual bar**

- **Start section**
  - ,Shape‘ Indicates the shape of the symbol at the beginning of the selected bar. Click the arrow to change the beginning shape. If you want no symbol at the beginning of the bar, select the first option (empty).
  - ,Type‘ Indicates the border style of the shape to be displayed at the beginning of the selected bar. Click the arrow to change the type. You can select ,Solid‘ or ,Framed‘.
  - ,Color‘ Indicates the color of the shape at the beginning of the selected bar. Click on the color field to change the color of the beginning shape.
- **Middle section**
  - ,Shape‘ Indicates the shape of the selected bar. Click the arrow to change the bar shape. If you want no visible bar shape, click the first option (empty).
  - ,Type‘ Indicates the border style of the selected bar. Click the arrow to change the type. You can select ,Solid‘ or ,Framed‘.
  - ,Color‘ Indicates the color of the selected bar. Click on the color field to change the bar’s color.
- **End section**
  - ,Shape‘ Indicates the shape of the symbol at the end of the selected bar. Click the arrow to add or change the end shape. If you want no symbol at the end of the bar, click the first option (empty).
  - ,Type‘ Indicates the border style of the shape at the end of the selected bar. Click the arrow to change the type. You can select ,Solid‘ or ,Framed‘.
  - ,Color‘ Indicates the color of the shape at the end of the selected bar. Click on the color field to change the color of the end shape.
- **Shadow section**

If you like to add a shadow to the selected bar, activate the ,Shadow‘ check box. Use the sliders beside the ,Shadow‘ check box to adjust opacity, blur, offset and angle.
- **Background**

Defined the background color for the row of the bar.



### Customize the displayed text of an individual bar



**,Left', ,Right', ,Top', ,Bottom', or ,Inside'** Enter the text or the name of a field whose contents will appear in position beside or on the bar. To add or change the text to be displayed for the selected bar, click in the field representing the position you want for the text (**for example**, Left), click on the arrow on the end of the text field, and then select the an entry from the pop-up (for example, ,Start' – iTTaskX will replace ,Start' with the start date and time of the task). All available task fields are listed. You can also combine fields with any other text. **For example**, Start;-;Task Name;-;Finish;Any Text (Note: All parts of the format string must be separated with a semicolon ,;').

#### Notes

- If you add text to the top or bottom of the Gantt bar, the row height for the corresponding task sheet increases to accommodate the additional space needed. You control the height of the bars with the Font size.
- To remove text from a Gantt bar, click in the field, and then press ,DELETE' on your keyboard to clear the field name.

### 3.6.6 Format Drawing

Use the ,Drawings' pane in the ,Format information' inspector to change the appearance of drawing elements like Line, Rectangle, Triangles, Circle and Text Field.



You can:

- Change the background (color fill or image fill).
- Change border style.
- Change the line width of the frame.
- Change the frame color.
- Change the shadow.

**Command:** ,Format' > ,Grafik...'

#### Notes

- To change the text characteristics like Font size, Font family... in text fields, select the text you want to change and select ,Format' > ,Font' > ,Show Fonts' and make your changes.
- Each drawing element is attached to the timescale. So when you change the units of the timescale (**for example**, bottom tier to weeks) the drawing is always displayed on the same date.

#### Hint

Holding down the ,CTRL' key while clicking on a drawing brings up a context menu which lists the commands you can use on those items. iTTaskX has several shortcut menus. Use shortcut menus to save time and make it easier to work with iTTaskX files.



## 3.7 View

### 3.7.1 New Custom View

Use the **‘New Custom View’** sheet to create a new custom view based on one of the available standard views.

You can:

- Enter the name of the view.
- Specify the standard view to based on.

**Command:** **‘View’ > ‘Custom Views’ > ‘New Custom View...’**

After you created a new custom view you can customize the view for your needs. **For example**, create a new print view which contains only the table columns you need for your printout.

#### Hints

- To restore a view to it’s default settings, select the view you want to restore, open the **‘View information’** pane in the **‘Format Inspector’** and click on the **‘Restore Defaults’** button.
- If you want to rename or delete a custom view, choose **‘View’ > ‘Custom Views’ > ‘Manage Custom Views’**.

#### Note

All custom views are stored on your local machine (~/.Library/Application Support/iTaskX/Customviews) and also available in other iTaskX documents for the current user. When you exchange iTaskX documents with other users your custom views are not available.

### 3.7.2 Save Current View as

Use the **‘Save Current View as’** sheet to create a new custom view based on the current view.

You can:

- Enter the name of the view.

**Command:** **‘View’ > ‘Custom Views’ > ‘Save Current View as...’**

#### Hints

- To restore a view to it’s default settings, select the view you want to restore, open the **‘Format View’** sheet and click on the **‘Restore Defaults’** button.
- If you want to delete a custom view, open **‘View’ > ‘Custom Views’ > ‘Manage Custom Views’**. Select the custom view you want to delete and press the **‘DELETE’** key on your keyboard.

#### Note

All custom views are stored on your local machine (~/.Library/Application Support/iTaskX/Customviews) and also available in other iTaskX documents for the current user. When you exchange iTaskX documents with other users your custom views are not available.

### 3.7.3 Manage Custom Views

Use the **‘Manage Custom Views’** sheet to manage your custom views.

You can:

- Rename your views.
- Delete your views.

**Command:** **‘View’ > ‘Custom Views’ > ‘Manage Custom Views...’**

To rename a view, doubleclick the row and enter the new name.

To delete a view, select the row you want to delete and press the **‘DELETE’** key on the keyboard.

**Note**

All custom views are stored on your local machine (~/.Library/Application Support/iTaskX/Customviews) and also available in other iTaskX documents for the current user. When you exchange iTaskX documents with other users your custom views are not available.

**3.7.4 Customize Columns**

Use the **‘Customize Columns’** sheet to change the displayed table columns of the current view.

You can:

- Add additional columns.
- Remove existing columns.

**Command:** **‘View’ > ‘Customize Columns...’** or use the context menu of the table header.

You can add additional columns to each of the available table views to display and edit the underlying information.

Select the column in the list and activate the check box in front of the name if you want to add that column or deactivate the check box if you want to remove that column.

New added columns are appended at the end of the existing ones. You can simply reorder the columns by dragging them to their desired position.

**Hints**

- Select a column name to see the column’s description under the list.
- If you want to restore customized tables to their default settings, click on the **‘Restore Defaults’** button.

**Note**

All settings will only affect the current view. Each view has its own settings!

**3.7.5 Graphics List (Inspector)**

Use the **‘Graphics List’** inspector to manage your drawing elements like **Line, Rectangle, Triangles, Circle and Text Field**.

You can:

- Select drawing elements.
- Create new drawing elements.
- Delete drawing elements.
- Open format options for the selected drawing element.

**Command:** **‘View’ > ‘Inspectors’ > ‘Graphics List’**

**Note**

You can also delete drawing elements which are out of the scroll range.

### 3.7.6 Format Information (Inspector)

Use the ,Format Information' inspector to customize the appearance for the current view or selected elements like drawings and table rows.

Command: ,View' > ,Inspectors' > ,Format Information'.

,View' pane



- **General**  
**Show Project Summary**  
Indicates if iTTaskX should display the project summary task. This task has the Number 0. This option is saved with your project.
- **Document Color**  
Indicates the document color of the current view. Click on the color button to set the document color or press the ,Restore Color' button to restore the document color to its default setting.
- **Grid Color**  
Indicates the grid color of the current view. Click on the color button to set the grid color or press the ,Restore Color' button to restore the grid color to its default setting.
- **Table**  
**Show Time in Date–Time Fields:** Indicates if the time information of date–time fields like ,Start' or ,Finish' should be displayed.  
**Show Vertical Gridlines:** Indicates if vertical gridlines are displayed in the table view.  
**Show Horizontal Gridlines:** Indicates if horizontal gridlines are displayed in the table view.
- **Gantt Chart**  
**Show Vertical Gridlines:** Indicates if vertical gridlines are displayed in the gantt view.  
**Show Horizontal Gridlines:** Indicates if horizontal gridlines are displayed in the gantt view.

#### Notes

- Not all options are available for each view.
- All settings will only effect the current view. Each view has its own settings!

,Date Time' pane



- **Week Starts on**  
Indicates the first day of the week.
- **First Week**  
Indicates the first week of the year.
- **Date Order**  
Indicates the order between day month and year.
- **Separator (Date)**  
Indicates the separator between day month and year.
- **Time Format**  
Indicates which time format will be used.
- **Separator (Time)**  
Indicates the separator between minutes and hours.
- **Before Noon / After Noon**  
This setting is only used by the 12–hour format.
- **Show Dates with Time**  
Displays dates with or without time. This setting can also effect bar labels.

### ,Metric' pane



- **Position**  
**X:** Defined the horizontal position of a drawing.  
**Y:** Defined the vertical position of a drawing.
- **Size**  
**Width:** Defined the width of a drawing.  
**Height:** Defined the height of a drawing.
- **Lock on Date**  
Links a drawing with a date. When a drawing is linked with a date and you zoom the view the drawing will stick on the selected date.
- **Geometry**  
Geometry options for drawings like, flip vertical, flip horizontal, rotate clockwise, rotate counterclockwise, make same width (2 or more drawings must be selected), make same height (2 or more drawings must be selected), make natural size.
- **Arrange**  
Arrange options (2 or more drawings must be selected) like, align left edges, align vertical centers, align right edges, bring to front (only one drawing can be selected), align top edges, align horizontal centers, align bottom edges, send to back (only one drawing can be selected).

### Notes

- It's not possible to move drawings behind bars.
- You can't rotate or flip text Fields.

### ,Drawings' pane



- **Fill**  
Defined the background style for drawings (color fill or image fill).
- **Stroke**  
Defined the border style for drawings.
- **Width**  
Defined the line width of the frame.
- **Color**  
Defined the frame color.
- **Shadow**  
If you like to add a shadow to drawings, activate the ,Shadow' check box. Use the sliders to adjust opacity, blur, offset and angle.

### Hint

Holding down the ,CTRL' key while clicking on a drawing brings up a context menu which lists the commands you can use on those items. iTaskX has several shortcut menus. Use shortcut menus to save time and make it easier to work with iTaskX files.

### „Text“ pane

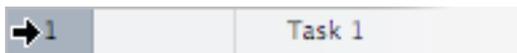


Use the „Text“ pane to change text options for text fields and tables.

- **Text Color**  
Defined the text color for text fields and text in tables.
- **Background**  
Defined the background color for text fields and table rows.
- **Alignment**  
Defined the alignment for text in text fields.
- **Spacing**  
**Character:** Defined the letter spacing in text fields.  
**Line:** Defined the line spacing in text fields.

### Notes

- Alignment and spacing options are not available for text in tables.
- To format text in tables, select the row like in the following picture. It's only possible the change the font or font styles for the whole row!



### „Bar“ pane



- **Start section**  
**Shape:** Indicates the shape of the symbol at the beginning of the selected bar. Click the arrow to change the beginning shape. If you want no symbol at the beginning of the bar, select the first option (empty).  
**Type:** Indicates the border style of the shape to be displayed at the beginning of the selected bar. Click the arrow to change the type. You can select „Solid“ or „Framed“.  
**Color:** Indicates the color of the shape at the beginning of the selected bar. Click on the color field to change the color of the beginning shape.
- **Middle section**  
**Shape:** Indicates the shape of the selected bar. Click the arrow to change the bar shape. If you want no visible bar shape, click the first option (empty).  
**Type:** Indicates the border style of the selected bar. Click the arrow to change the type. You can select „Solid“ or „Framed“.  
**Color:** Indicates the color of the selected bar. Click on the color field to change the bar's color.
- **End section**  
**Shape:** Indicates the shape of the symbol at the end of the selected bar. Click the arrow to add or change the end shape. If you want no symbol at the end of the bar, click the first option (empty).  
**Type:** Indicates the border style of the shape at the end of the selected bar. Click the arrow to change the type. You can select „Solid“ or „Framed“.  
**Color:** Indicates the color of the shape at the end of the selected bar. Click on the color field to change the color of the end shape.
- **Shadow section**  
If you like to add a shadow to the selected bar, activate the „Shadow“ check box. Use the sliders beside the „Shadow“ check box to adjust opacity, blur, offset and angle.
- **Background**  
Defined the background color for the row of the bar.



### Note

- If you like to change a category of bars, use the ,Bar Styles' sheet in the ,Format' menu.

### ,Bar-Text' pane



- **,Left', ,Right', ,Top', ,Bottom', or ,Inside'**  
Enter the text or the name of a field whose contents will appear in position beside or on the bar. To add or change the text to be displayed for the selected bar, click in the field representing the position you want for the text (**for example**, Left), click on the arrow on the end of the text field, and then select the an entry from the pop-up (**for example**, ,Start' – iTaskX will replace ,Start' with the start date and time of the task). All available task fields are listed. You can also combine fields with any other text. **For example**, Start;-;Task Name;-;Finish;Any Text (Note: All parts of the format string must be separated with a semicolon ,;').
- **Text Color**  
Defined the text color for the bar text.
- **Shadow**  
If you like to add a shadow to your bar text, activate the ,Shadow' check box. Use the sliders to adjust opacity, blur, offset and angle.

### Notes

- If you add text to the top or bottom of the Gantt bar, the row height for the corresponding task sheet increases to accommodate the additional space needed. You control the height of the bars with the Font size.
- To remove text from a Gantt bar, click in the field, and then press ,DELETE' on your keyboard to clear the field name.

### 3.7.7 Item Information (Inspector)

Use the ,Item Information' inspector to enter, review or change information about the project, selected tasks, resources, assignments, links or notes.

Command: ,View' > ,Inspectors' > ,Item Information'.

### ,Project information' pane



- **Start date**  
Specifies the start date of the project.
- **Finish date**  
Shows the scheduled finish date of the project.
- **Current date**  
Specifies the date that iTaskX should use as the current date.
- **Calendar**  
Specifies the calendar that iTaskX should use to do the calculation of task dates.
- **Budget**  
Specifies the planed project budget. iTaskX displays a warning in the left lower corner of the application window when the budget is passed over.
- **Title**  
Specifies the title of the project.
- **Subject**  
Specifies the subject of the project.



- **Author**  
Specifies the author of the project.
- **Manager**  
Specifies the responsible person of the project.
- **Company**  
Specifies the company that have created the project.
- **Statistics...**  
Displays summary information about the project.

#### ,Task information' pane



- **Name**  
Specifies the name of the task.
- **Duration**  
Specifies the amount of time needed to complete the selected task. You can enter duration in minutes, hours, days, weeks, or months. To enter an estimated duration, type a question mark after the duration unit, or select the **Estimated** check box.  
You can change the default estimated duration settings for all future tasks in the current project. On the ,Edit' menu, click ,Project Options...' and then click the ,Schedule' tab. If you prefer not to use the question mark for estimated durations, clear the **Show that tasks have estimated durations** check box. If you prefer that new tasks do not have estimated durations by default, clear the **New tasks have estimated durations check box**.
- **Start**  
Specifies the task's scheduled start date. If the task has a predecessor, iTaskX calculates the start date. If you enter a start date for a task, iTaskX sets a moderately flexible constraint, such as ,Start No Earlier Than', on the task.
- **Finish**  
Specifies the task's scheduled finish date. If you specify a start date and duration, iTaskX calculates the finish date. If you enter a finish date for a task, iTaskX sets a moderately flexible constraint, such as ,Finish No Earlier Than' on the task.
- **Mark task as milestone**  
Specifies that the task is a milestone. You could also mark a task as a milestone by entering 0 in the ,Duration' field.
- **Hide bar**  
Hides the graphical representation for the selected task.
- **Show child tasks**  
Displays all child tasks in the summary row, when the summary is collapsed.
- **Constraint**  
Restricts the allowable start or finish date for the task. You can assign one constraint per task. If you specify a constraint other than ,As Soon As Possible' or ,As Late As Possible', enter the appropriate date in the ,Date' field.
- **Date**  
Specifies the date associated with a moderate or inflexible constraint selected in the ,Constraint' field. All constraints except ,As Late As Possible' and ,As Soon As Possible' require a date.
- **Task type**  
Specifies the effect that a change to work, assignment units, or duration has on the calculation of the other two fields for this task. Unless you specify a different default task type on the ,Schedule' tab of the ,Project Options' sheet, the default task type is ,Fixed Units'.
- **Effort driven**  
Specifies that iTaskX keep the total task work at its current value. The duration of a task shortens or lengthens as resources are added or removed from a task that is effort driven while the amount of effort necessary to complete a task remains unchanged. By default, this check box is selected when ,Fixed Duration' or ,Fixed Units' is the selected task type.

**Note:**

You can set the default task type for all new tasks on the Schedule tab of the ,Project Options' sheet.

- **Calendar**  
Specifies a calendar for the selected task. By default, tasks are scheduled based on the working time of the project calendar, as set in the ,Item Information' inspector. Tasks are also scheduled based on the working time of assigned resources. You can choose from the base calendars that come with iTaskX, as well as any new base calendars you have created. You can create your own calendars by clicking the ,Plus' button in the ,Change Working Time' sheet (,Edit' > ,Working Time...').
- **Ignore resource calendar**  
Specifies that iTaskX use only the task calendar to schedule the selected tasks and not resource calendars. This option is available only if a task calendar is specified in the ,Calendar' field.
- **Fixed Cost**  
Specifies any nonresource task expense.
- **Cost accrual**  
Specifies when fixed cost for that task will be incurred.
- **% Complete**  
Specifies how much of the task has been completed. Enter a number between 0 and 100 that indicates the percentage of actual progress on the task. Based on this value, iTaskX calculates the task actual and remaining duration.

**,Resource information' pane**

- **Name**  
Indicates the name of the selected resource (must be unique within the project).
- **Initials**  
Indicates the resources initials or other abbreviation that identifies the resource.
- **Email**  
Indicates the email address of the selected resource. This field is available only if the type of the resource is set to ,Work'.
- **Code**  
Specifies a code for the resource, such as a cost center code.
- **Type**  
Specifies whether the resource is a work resource or a material resource.  
**Work:** Work resources are people, equipment, or facilities that are assigned to a task and are not consumed during the task.  
**Material:** Material resources are consumable resources, such as steel, that you want to track.
- **Material label**  
Specifies the label for the unit of a material resource. For example, for cement, you can enter Yard, to track yards of cement for the project. This field is available only if the type of the resource is set to ,Material'.
- **Max. Units**  
Specifies the maximum units available for this resource. These settings, together with the resource's calendar, determine how much work a resource can do without being overallocated. You can also specify part-time availability with maximum units. For example, if you have a resource who is available to your project two days a week, you can enter the maximum units as 40 percent. You can enter maximum units as a percentage (50 %, 100 %, 300 %). This field is available only if the type of the resource is set to ,Work'.
- **Calendar**  
Specifies the calendar that defines the working hours of the resource. This field is available only if the type of the resource is set to ,Work'.
- **Standard Rate**  
Specifies the hourly rate to be accrued for regular work, or straight time, for this resource.



- **Overtime Rate**  
Specifies the hourly rate to be accrued for overtime work for this resource.
- **Per Use Cost**  
Specifies costs to be accrued whenever this resource is used, regardless of the amount of work done.
- **Cost accrual**  
Specifies when standard and overtime costs for resources will be incurred. Per-use costs are always accrued at the start of a task.

#### Assignment information pane



- **Resource**  
Indicates the resource of the assignment.  
Select the resource in the list or type the beginning of the name and iTaskX will complete the name if it can be found. If the name could not be found iTaskX adds the resource automatically to the project (as a resource of type 'Work').
- **Work**  
Defines the total amount of work scheduled, or entered, to be performed by a resource on a task.  
iTaskX normally calculates total assignment work based on the assignment span and the assignment units for the assigned resource. Work includes actual work and remaining work, as well as overtime work.  
Edit the Work field for an assignment when you want to change the amount of time a resource works on a task.  
Enter work as number followed by 'm' for minutes, 'h' for hours, 'd' for days, 'w' for weeks or 'mo' for months. If you do not enter any units iTaskX will use the default settings entered in the 'Project Options' sheet.
- **Actual work**  
Indicates the amount of work that has already been done by a resource on a task.
- **Remaining work**  
Indicates the amount of time required by a resource assigned to a task to complete an assignment.
- **% Work complete**  
Indicates the current status of the assignment, expressed as the percentage of the assignment's work that has been completed.
- **Actual overtime work**  
Indicates the actual amount of overtime work already performed by a resource on an assigned task.
- **Remaining overtime work**  
Indicates the amount of overtime work that remains on an assignment.
- **Cost**  
Shows the total scheduled (or projected) cost for an assignment based on costs already incurred for work performed by the resource on a task, in addition to the costs planned for the remaining work for the assignment.
- **Overtime cost**  
Shows the total overtime cost for a resource assignment.
- **Actual cost**  
Displays the cost incurred for work already performed by a resource on a task.
- **Actual overtime cost**  
Displays the cost incurred for overtime work already performed by a resource on a task.

### „Resource assignments“ pane



- **Resource Name**  
In the „Resource Name“ column all added resources are listed. To assign a resource, activate the assign symbol left beside the desired resource name. After you assigned all resources to the selected task, click on the „Assign“ button to set the assignments.  
If you like to remove a assignment from a task, deactivate the assign symbol left beside the desired resource name and then click on the „Assign“ button.
- **Units**  
Type the number of assignment units that you are allocating to the task. For example, to assign a work resource to work half-time on a task, type 50%. The default for assignment units is the same as the resource’s maximum units, up to 100%.

To assign a material resource to a task, type the quantity of material to be used. The unit of measurement label (tons, boxes, yards, and so on) that you used to define the material resource appears in the „Units“ field, and the default is 1. You can also enter an optional time unit (**for example**, / h) after the quantity value.

### Notes

- If you want to assign a new resource that isn’t already identified in the resource pool, you can simply type the resource name in a blank row. iTaskX automatically will add the the new resource to the project. This procedure is only valid for resources of type „Work“. Resources of type „Material“ could only be added in the „Resource Sheet“ view.
- To remove a resource from your project, select the desired resource and press the „Minus“ button.
- Tasks with assigned resources have a icon  in the „Task Info“ column.
- You can’t assign resources to a summary task.

### „Links“ pane



The „Successor Links“ table shows all outgoing links from the selected task. In the „Predecessor Links“ tabe you see all incoming links from the selected task.

- **ID**  
Displays the „ID“ of the tasks successor or predecessor.
- **Task Name**  
Displays the name of the tasks successor or predecessor.
- **Type**  
Specifies a task dependency. You can select the dependency type from the list.
- **Lag**  
Specifies the lead time or lag time between the tasks. Enter a duration amount including the time unit abbreviation, for example, 2d or 4w.  
If the successor uses a task calendar, the duration is based on that calendar; otherwise it is based on the project calendar.

### Note

Use the „Minus“ or „Plus“ buttons to remove or create links.



### ,Notes' pane



- Offers a workspace you can use to type a note to associate with the task, resource or assignment.

### 3.7.8 Customize Toolbar

Use the ,Customize Toolbar' sheet to customize the toolbar for your personal needs.

**Command:** ,View' > ,Customize Toolbar...'

To add a toolbar item, simply drag the desired item on the toolbar.

To delete a toolbar item, drag it out of the toolbar.

To rearrange items, drag them on the desired position.

#### Notes

- To show or hide the toolbar, click the toolbar button in the upper-right corner of the project window.
- You may also be able to customize the toolbar directly. To remove an item, press the ,COMMAND' key and drag the item out of the toolbar. To rearrange items, press the ,COMMAND' key and drag the items into the order you prefer.



## 3.8 Help

### 3.8.1 Send Feedback

Use the 'Send Feedback' sheet to send us questions, improvements and bug reports. The information you give us is very important. We need you to be as specific as you can. For bugs and crashes, if you can tell us how it happened or when it happened, it is very helpful to us. We appreciate your participation and want you to know that we heavily rely on your feedback to improve iTaskX.



## 4.0 iTTaskX Hints

- iTTaskX provides a Guide with easy-to-follow instructions to help you to enter tasks, define and assign resources, track progress, and report on the status of your project.
- When entering tasks do not enter ,Start' or ,Finish' dates. It's important to note that you can schedule your tasks most effectively by entering only ,Task Name' and ,Duration' for each task and letting iTTaskX, after linking, calculate the start and finish dates for you.
- In the ,Duration' column, enter the time required to complete each task, as a number followed by ,m' for minutes, ,h' for hours, ,d' for days, ,w' for weeks or ,mo' for months.
- It's also possible to create ,Finish-to-Start', ,Start-to-Start', ,Finish-to-Finish', or ,Start-to-Finish' links with the mouse in the ,Gantt Chart'. To create a link between two tasks with the mouse in the ,Gantt Chart', click on the desired taskbar and drag the mouse up or down until the cursor change into a chain, then release the mouse button on the other taskbar.
- You can quickly add lead or lag time to a successor task by double-clicking the link line on the ,Gantt Chart' and then typing the amount of lead or lag time in the ,Lag' field.
- Set the duration of a task to ,0' and iTTaskX will create a milestone.
- Tasks with attached notes have a note icon  in the ,Task Info' column.
- Tasks with attached documents have a attachment icon  in the ,Task Info' column.
- Tasks with attached documents, which have a broken link have a broken attachment icon  in the ,Task Info' column.
- Tasks with assigned resources have a resource icon  in the ,Task Info' column.
- Tasks with constraints are marked in the ,Task Info' column with a small icon .
- Completed tasks have a complete icon  in the ,Task Info' column.
- Rearrange columns:

Finish	Resource Names	Predecessors
06.12.04	Gigi1; Gigi2	

You can rearrange columns in views which contains tables by clicking on the column header, leaf the mouse button pressed and dragging it to the desired position.

- Resize row height:

1		Task1
2		Task 2

To resize rows heights in views which contains tables, click between two rows like in the left picture, leaf the mouse button pressed and move.

- Resize column width:

Task Name	Duration	Start
Task1	3 d	02.12.04

To resize columns widths in views which contains tables, click between two columns in the table header like in the left picture, leaf the mouse button pressed and move.

- In iTTaskX, each resource has a calendar specifying the resources working and non-working days and the hours the resource works on working days. By default, resource and task calendars are equal to the project calendar.
- To assign resource(s) to more tasks, hold down the ,COMMAND' key, select your tasks and press the ,Assignments' button in the toolbar.



- You can set different timelines, text styles and bar styles for the ,Gantt Chart‘ and ,Tracking Gantt‘ view. Different text styles are also available in the ,Task Sheet‘, ,Task Usage‘, ,Resource Sheet‘ and ,Resource Usage‘ view.
- The fastest way to change the appearance of a single or multiple bar(s) in the ,Gantt Chart‘ view is holding down the ,CTRL‘ key while clicking on a bar and choose ,Format Bar...‘ from the shortcut menu.
- To see the total cost for the project choose ,Current View...‘ in the ,Format‘ menu and select ,Show Project Summary‘ in the ,Appearance‘ tab.
- If you have selected a row in a view which contains tables press ,SHIFT‘ – ,RETURN‘ to activate the edit mode. Jump to the next field with ,TAB‘ and back with ,SHIFT‘ – ,TAB‘.
- Press ,OPTION‘ – ,RETURN‘ to set a linebreak in tablefields (edit mode).
- Press the ,SPACE‘ key on your keyboard to navigate with the grab hand in views.
- To turn off ,Effort driven‘ scheduling for all new tasks, select ,Project Options...‘ from the ,Edit‘ menu and then click the ,Schedule‘ tab. Clear the ,New tasks are effort driven‘ check box.
- In the ,Print Preview‘ are also other options like ,Print Range‘ or ,Save View as Image‘. It’s also possible to set up different print settings for each view. In the ,Calendar‘ and ,Network Diagram‘ view it’s not possible to change fonts, columns or timeline.
- To delete entries from sheets which contain tables, select the entry and press the ,DELETE‘ key on your keyboard.
- ,Save View as Image...‘ in the ,File‘ menu is only available in the ,Print Preview‘.
- iTTaskX search only in the editable fields ,Task Name‘ and ,Resource Name‘.



## 5.0 iTaskX Shortcuts

Action	Shortcut
<b>Getting around tables</b>	
Bring selected Row in Edit Mode.....	⇧ + Return
Jump into the next Field (Edit Mode) .....	Tab
Jump one Field back (Edit Mode) .....	⇧ + Tab
Enter Linebreake (Edit Mode).....	⌘ + Return
Fit Row Heights.....	⌘R
Indent Tasks .....	⌘ + Right Arrow
Outdent Tasks .....	⌘ + Left Arrow
Expand .....	⌘ + Down Arrow
Collapse .....	⌘ + Up Arrow
Expand All .....	⌘⌘ + Down Arrow
Collapse All .....	⌘⌘ + Up Arrow
Link Tasks .....	⌘L
Unlink Tasks.....	⌘⌘L
Split Tasks .....	⌘⌘S
Cut Row (selected Row) .....	⌘X
Copy Row (selected Row).....	⌘C
Paste Row (selected Row) .....	⌘V
Select all Rows (selected Row) .....	⌘A
<b>Input of the Duration</b>	
Duration in Minutes .....	m
Duration in Hours .....	std
Duration in Days.....	t
Duration in Weeks .....	w
Duration in Month .....	mo
<b>Editing Text</b>	
Move one character to the right .....	Right Arrow
Move one character to the left .....	Left Arrow
Extend selection one character to the right.....	Shift-Right Arrow
Spelling .....	⌘:
Check Spelling.....	⌘;
Cut .....	⌘X
Copy.....	⌘C
Paste .....	⌘V
Select All .....	⌘A
<b>Views</b>	
Gantt Chart (Entry Table) .....	F1
Tracking Gantt (Tracking Table).....	F2
Calendar.....	F3
Network Diagramm.....	F4
Task Sheet (Summary Table) .....	F5
Task Usage (Usage Table) .....	F6
Resource Sheet (Entry Table).....	F7
Resource Usage (Usage Table) .....	F8
Actual Size.....	⌘0
Zoom In.....	⌘+
Zoom Out .....	⌘-
Goto Task.....	⌘⌘T



<b>Action</b>	<b>Shortcut</b>
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**Inspectors**

Show Inspectors .....	⇧⌘I
Item Information.....	⌘1
Format Information.....	⌘2
Graphics List.....	⌘3
Show Colors .....	⇧⌘C
Show Fonts .....	⌘T
Item Information.....	⌘I
Hide iTTaskX Guide .....	⌘F2

**Print**

Print-Preview .....	⌘P
Verlassen der Druckvorschau.....	ESC
Page Setup.....	⇧⌘P
Print .....	⌘P

**Others**

Project Information .....	⌘I
Project Options.....	⌘J
Working Times.....	⌘K
Open iTTaskX Preferences .....	⌘,
Hide iTTaskX .....	⌘H
Hide Others .....	⇧⌘H
Quit iTTaskX.....	⌘Q
Save Current view as Picture .....	⌘E
New.....	⌘N
New from Template .....	⇧⌘N
Open .....	⌘O
Close .....	⌘W
Save.....	⌘S
Save As.....	⇧⌘S
Undo Project Info change.....	⌘Z
Redo.....	⇧⌘Z
Find.....	⌘F
Find Next.....	⌘G
New Item .....	⇧⌘N
Minimize .....	⌘M
iTTaskX Help .....	⌘?

- ⌘ Command or Apple-Key
- ⇧ Shift-Key
- ⌘ ALT-Key
- ^ Control-Key



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