Projects - How To Set Up Task Groups

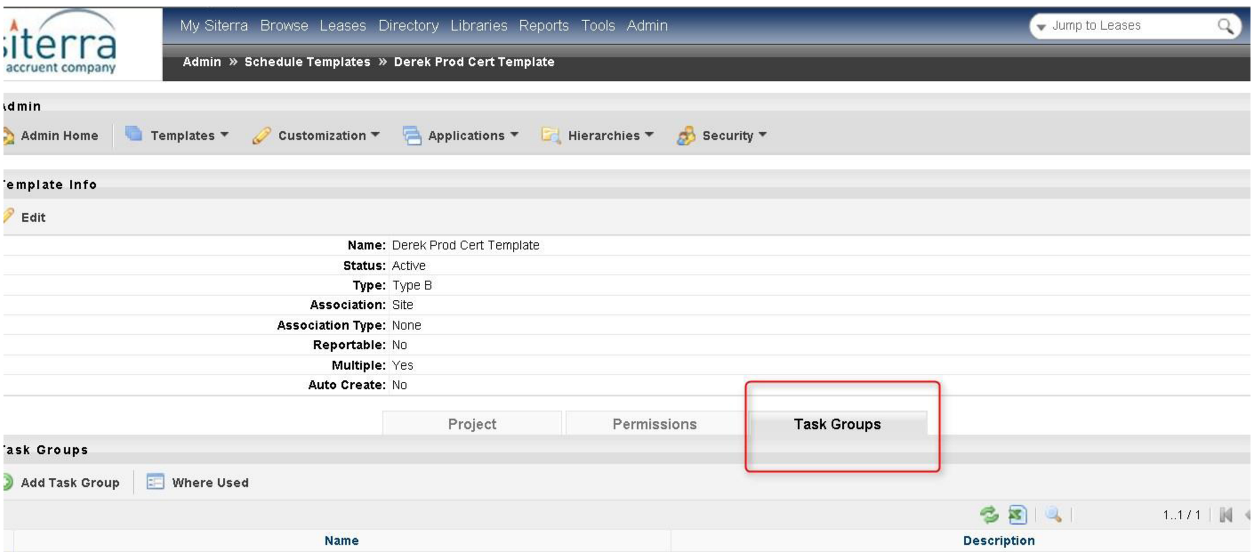
Question:

How do I setup task groups? Task Groups can be used to make additional tasks appear in a schedule template. For example, if you wanted a set of tasks to only show up on some of your projects, you could use a Task Group to accomplish this goal.

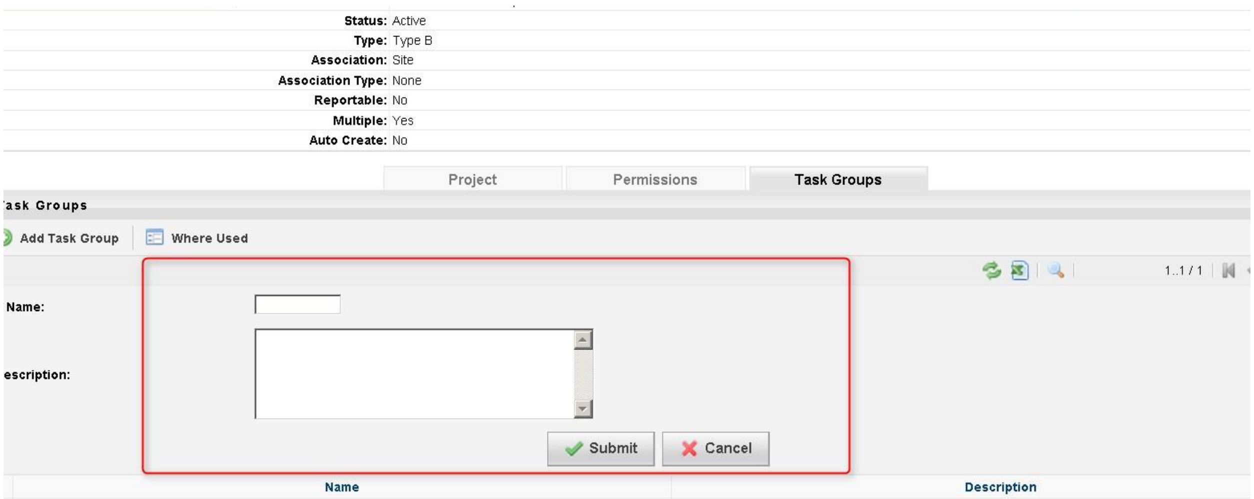
Answer:

1. First, navigate to the Schedule Template you would like to add Task Groups to.

2. Select the Task Groups tab, as indicated below.



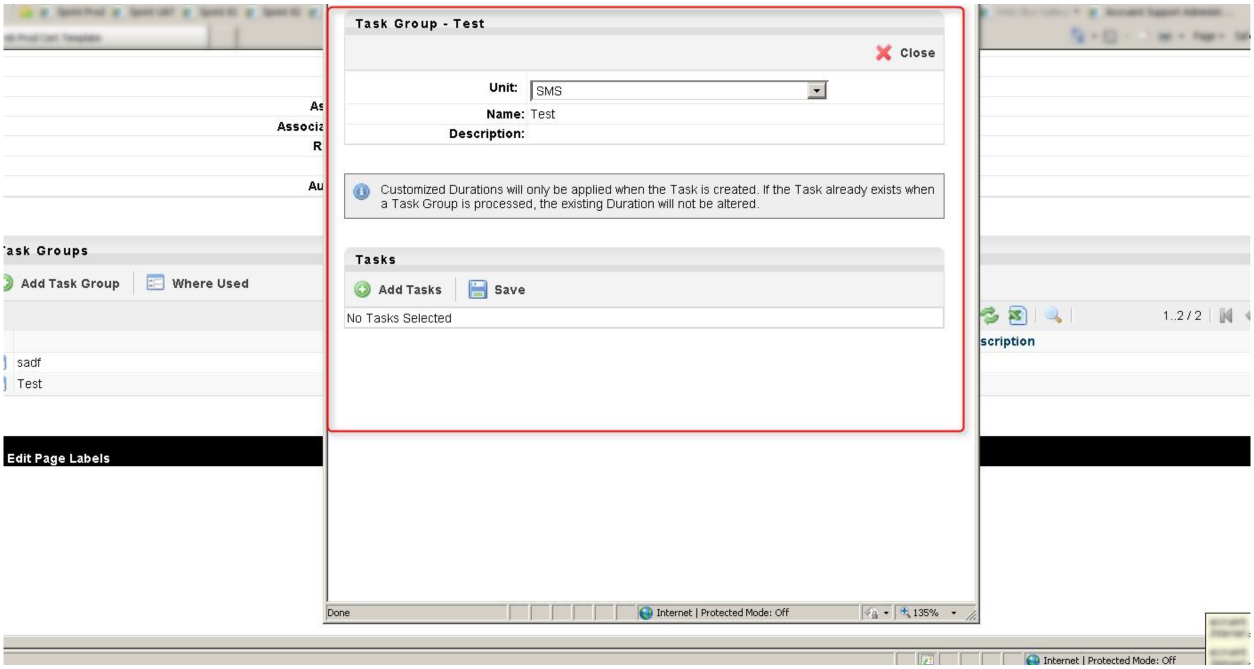
3. Next, select the Add Task Group button. This will open a new prompt like the one pictured below.



4. Enter a Name for your Task Group. You can also enter a Description if you wish, but it is not necessary. Then click Submit.

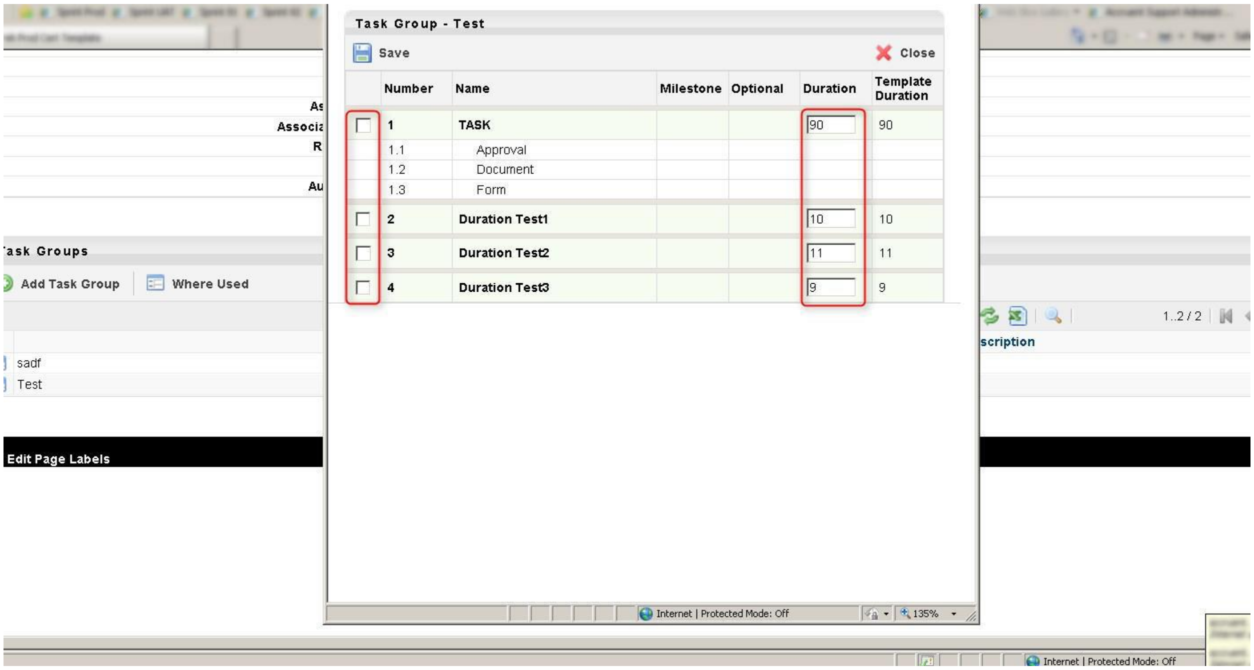
5. You should see your new Task Group in the list near the bottom of the screen. Click the blue and white menu button to the left of your Task Group and Select Manage.

6. This will bring up a window similar to the one pictured below.



Note that if you like you can restrict which Org Unit a task group will appear under by changing the Unit dropdown. For our purposes however, we will leave that setting at default. Click the Add Tasks button.

7. This will bring up another new window, like the one pictured below.



As you can see, to the left of each task from the schedule template is a tick box. Select each task that you wish to add into the Task Group. You can also set a different duration if the task appears in your task group by changing the Duration field on the right. Once you've chosen your tasks, click the Save button. This will close the prompt. Click the Save button on the next window and your Task Group is now ready for use.