

**Dorset Portfolio
Management Office**

Celoxis

**Tasks – Project
Planning**



Tasks in Celoxis

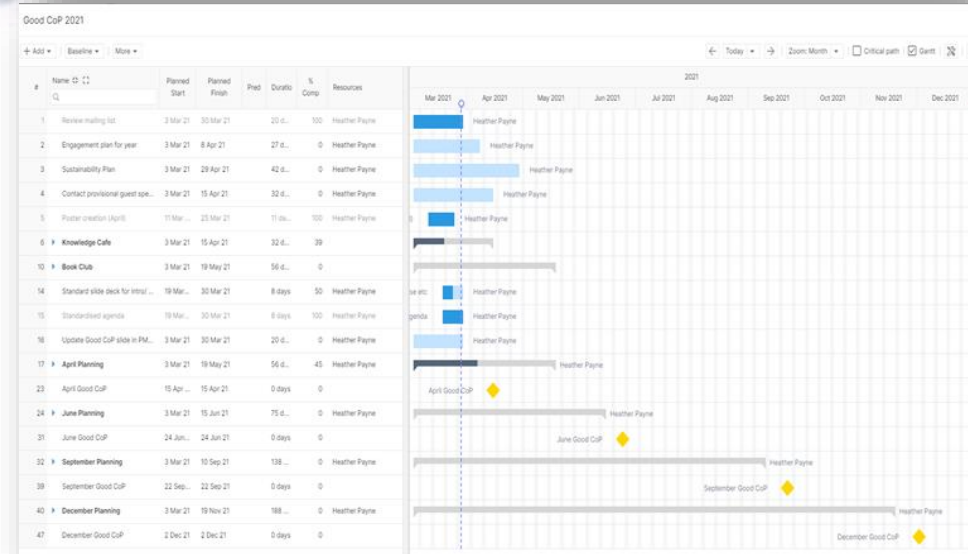
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Project	Name	Planned Start	Planned Finish	% Comp	Schedule Health	Resources
Good CoP 2021	Agree book club dates and agenda	3 Mar 21	31 Mar 21	0%	At Risk	Heather Payne, PSD
	Confirm agenda	3 Mar 21	31 Mar 21	0%	At Risk	Heather Payne
	Confirm agenda	3 Mar 21	14 May 21	0%	At Risk	Heather Payne[63.019%], PSD...
	Confirm agenda	3 Mar 21	31 Aug 21	0%	At Risk	Heather Payne[50%], PSD[50%]
	Confirm agenda	3 Mar 21	22 Oct 21	0%	At Risk	Heather Payne[50%], PSD[40%]
	Confirm speakers	3 Mar 21	7 May 21	0%	At Risk	Heather Payne
	Confirm speakers	3 Mar 21	25 Aug 21	0%	At Risk	Heather Payne
	Confirm speakers	3 Mar 21	15 Oct 21	0%	At Risk	Heather Payne[50%], PSD[50%]
	Contact provisional guest speakers	3 Mar 21	15 Apr 21	0%	At Risk	Heather Payne
	Engagement plan for year	3 Mar 21	8 Apr 21	0%	At Risk	Heather Payne
	Invites set up and sent	3 Mar 21	9 Apr 21	0%	At Risk	Heather Payne[50%], PSD[50%]
	Invites set up and sent	3 Mar 21	19 May 21	0%	At Risk	Heather Payne[50%], PSD[50%]
	Send invites	3 Mar 21	14 May 21	0%	At Risk	Heather Payne
	Send invites	3 Mar 21	13 Aug 21	0%	At Risk	Heather Payne
	Send invites	3 Mar 21	22 Oct 21	0%	At Risk	Heather Payne
	Set up Teams invites	3 Mar 21	7 May 21	0%	At Risk	Heather Payne
	Set up Teams invites	3 Mar 21	13 Aug 21	0%	At Risk	Heather Payne
	Set up Teams invites	3 Mar 21	22 Oct 21	0%	At Risk	Heather Payne



Adding Tasks >>>

Adding Tasks

You can add your tasks directly in the Gantt screen

	Planned Start	Planned Finish	Predecessors	Duration
6	SID update	11 Jan 21	11 Jan 21	5
7	Initial Design	5 Feb 21	31 Mar 21	1
12	PMO internal Testing	1 Apr 21	19 May 21	7
22	Final Design	20 May 21	7 Jul 21	12
30	Rollout Communication Cam...	8 Jul 21	23 Aug 21	22
33	Review & Close	24 Aug 21	12 Jan 22	30

Change the time period, view the critical path and turn off the Gantt option. You can also print to PDF, HTML or Image

Click to make quick edits. Right click on a task to open the task edit screen

You can also add tasks using the 'Add' buttons in the home and project screens

Subtasks and Milestones

Task

Subtask

Successor

Milestone

Multiple

	Planned Start	Planned Finish	Pred	Duration	% Comp	Resources
Copy from another project	1 Dec 20	1 Jan 22		284 ...	100	Project Manager (test)
Import CSV	5 Feb 21	2 Feb 22	1	259 ...	82	Project Manager (test)
Import Microsoft Project	3 Feb 22	16 Aug 22	7	139 ...	24	
19 Final Design	2 Jun 21	4 Oct 22	12	350 ...	14	
20 Create Final Framework					100	
21 Create Final User Guide					0	
22 Sign off					0	
23 Confirm Sign off Arrang					0	
24 Framework Signed Off					0	
25 Upload Final Framework to...				34 d...	0	
26 Framework Go Live	17 Aug...	4 Oct 22		35 d...	0	
27 New Task	17 Aug...	17 Aug 22				
23 Confirm Sign off Arrangem...	17 Aug...	30 Sep				
24 Framework Signed Off	17 Aug...	30 Sep				
25 Upload Final Framework to...	17 Aug...	3 Oct 2				
26 Framework Go Live	17 Aug...	4 Oct 22			0	
27 New Task	17 Aug...	17 Aug 22		1 day	0	
28 New Milestone	16 Aug...	16 Aug 22		0 days	0	

Summary tasks are shown as grey bars. Subtasks are shown as blue bars. And milestones are shown as yellow diamonds.

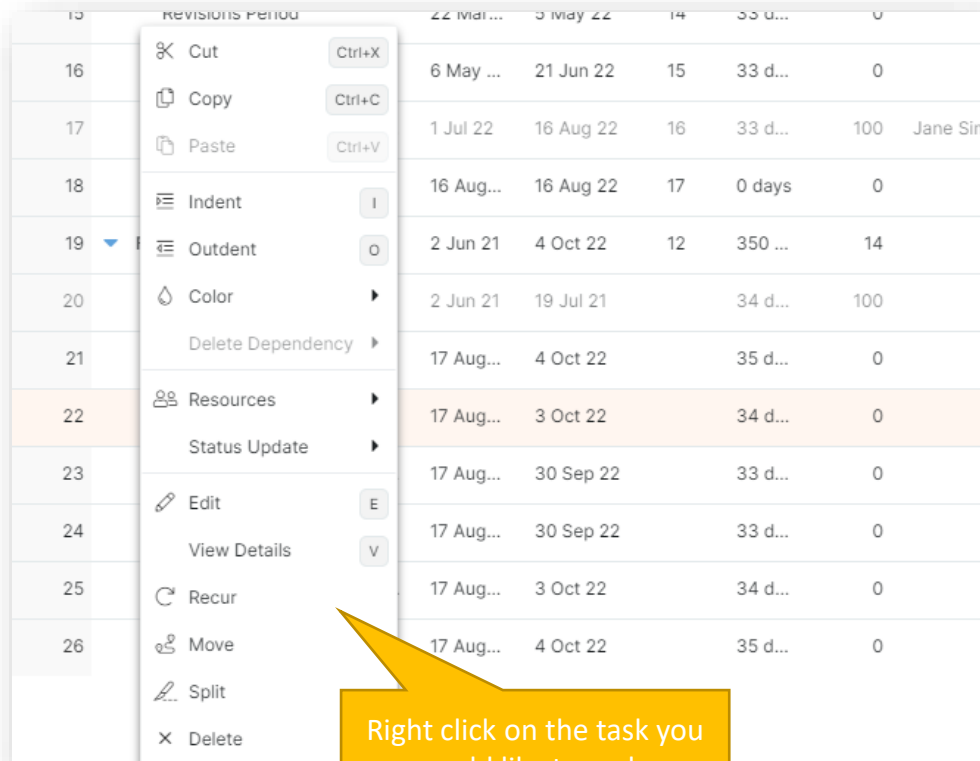
Select your summary (parent) task and then select 'Add > Subtask'. A new field will appear under the summary task you selected

Select 'Add > Milestone'. A new field will appear with the duration automatically set to '0'. If you assign a duration, it will become a normal task

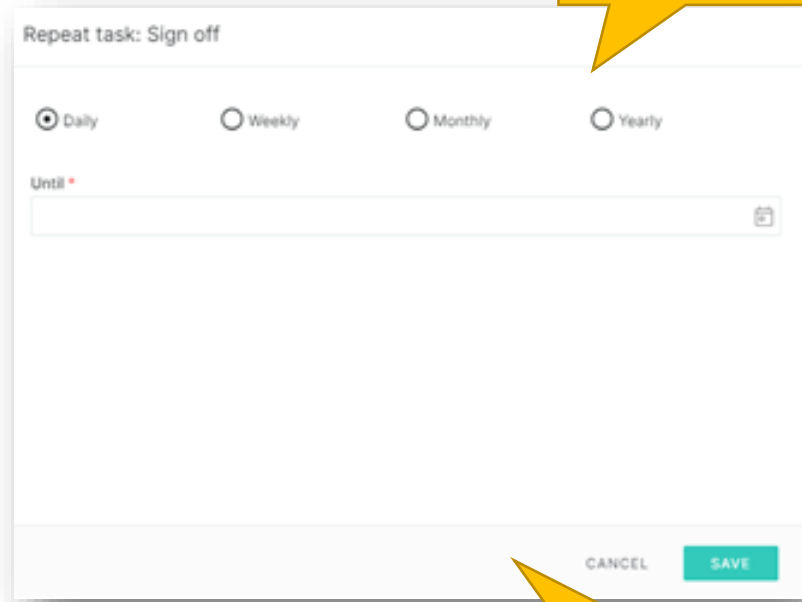
Summary task dates are updated based on its subtask dates. To change a summary task end date, you must change the subtasks.

By clicking to the right of the task name, you can drag and drop items. Select a task and press 'I' to indent (create a subtask) or 'O' to outdent (make it a single task)

Recurring Tasks



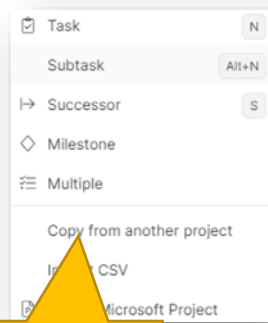
Right click on the task you would like to make recurring and select 'Recur'



Then select the frequency and when the recurrence should end

These recurring tasks will be manually scheduled with the same duration and resources as the original

Multiple Tasks



From the 'Add' menu, select 'Multiple' to open this screen

Add Multiple Tasks

Enter one per line: Name | Resources | Duration | Start | Finish Examples

Office Interiors	This is a Summary Task
= Air Conditioning	Use = to create a child task
= Vendor Selection Mark	100% allocation and default duration of 1 day
= Electrical Wiring Rob[50%] 4d	Duration of 4 days with a 50% allocation
= Install Internal Unit Pete[10h] 2d 10/20/2016	Duration of 2 days, Effort of 10 hours & SNET 10/20/2016
= Install Outdoor Unit Dave 10/20/2016 10/24/2016	A manually scheduled task with both dates
= Signoff Mark 0d	Milestone, because duration is 0

CANCEL SUBMIT

Click on 'Examples' to open guidance and examples on how to add multiple tasks while you work

Tasks will be added to the project plan in the order you enter them. You can also paste your list from another source and edit the notations

Copying Tasks From The Same Or Another Project

The screenshot shows a task list with columns for start date, end date, duration, and resources. A context menu is open over a task, showing options like Cut, Copy, Paste, Indent, Outdent, Color, Delete Dependency, Resources, Status Update, Edit, View Details, Recur, Move, Split, and Delete. A yellow callout box points to the 'Copy' option.

Start Date	End Date	Duration	Resources
22 Mar...	3 May 22	14	33 d...
6 May ...	21 Jun 22	15	33 d...
17 Aug...	4 Oct 22	35 d...	
17 Aug...	3 Oct 22	34 d...	
17 Aug...	30 Sep 22	33 d...	
17 Aug...	30 Sep 22	33 d...	
17 Aug...	3 Oct 22	34 d...	
17 Aug...	4 Oct 22	35 d...	

Right click on the task you want to copy and select. Or cut to move the task (remember, you can use drag and drop for this too). Click where you want the task to paste and right click again. Predecessors and constraints are retained.

The context menu is open, showing options: Task, Subtask, Successor, Milestone, Multiple, Copy from another project, Import CSV, and Import Microsoft Project. The 'Copy from another project' option is highlighted.

Multiple tasks can be copied and will be added at the end of your task list. Dependencies will be retained however constraints on auto-scheduled tasks will not.

A search dialog box is shown with a search bar and a list of tasks. The tasks listed are: (Copy) Home First Demo, (Copy) OAN specialities template, A1-1: Governance and Accountability, A1-2: Regulation & Oversight, A1-3: Provider Collaboratives, A1-4: Place-based Partnerships, A1-5: Strategic and Operational Commissioning, A1-6: Clinical and Professional Leadership, and A1: Functions, Governance & Accountability.

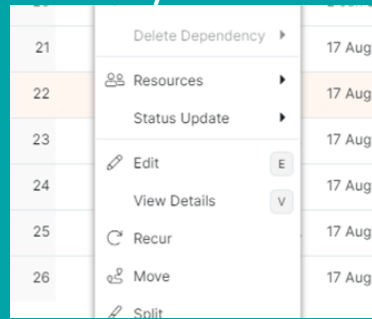
The 'Copy from another project' dialog box is shown. It has a 'Project' dropdown menu set to 'Celoxis launch & rollout'. Below it, there is a 'Select Tasks' section with a list of tasks: Procurement/contracts & 'Go Live', Procurement process, Procurement complete / approval for contracts, Finance approval and set up of SBS client, Invoice receipt and payment, Celoxis 'Go Live', and PMO & Super user training. There are 'CANCEL' and 'COPY' buttons at the bottom.

From the 'Add' button, select 'Copy from another project'. Then select the desired project you want to copy from, and then the task(s)

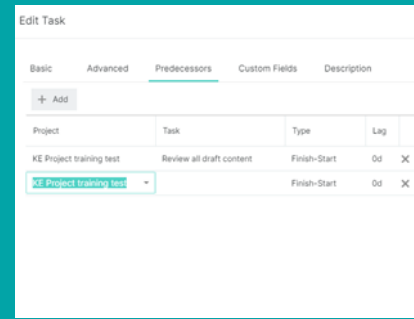
Predecessors and Successors

You can also create predecessors in the Project Plan screen by clicking on the three dots next to the project name

Right click on the desired task and click 'Edit' or 'E' on the keyboard

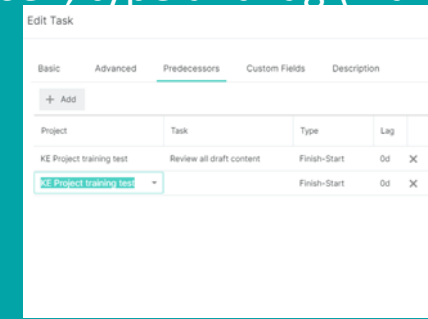


Click on the 'Predecessors' tab and then press 'Add'



The 'Type' refers to the phase of the predecessor task in relation to this one. For example, using the 'Finish-Start' type, your predecessor task must finish before your new task can begin

Select the project you want to copy the task from, the task itself, type and lag (if any)



Tasks can be copied from any other project. Refine your search by typing the beginning few letters of the project name or project code

More About The Gantt Screen

The screenshot shows a Gantt chart with a context menu open over a task. The menu includes options like Cut, Copy, Paste, Indent, Outdent, Color, Delete Dependency, Resources, Status Update, Edit, View Details, Recur, Move, Split, and Delete. The task being edited is highlighted in orange.

ID	Task Name	Start Date	End Date	Duration	Resources
16	6 May ...	21 Jun 22	15	33 d...	0
17	1 Jul 22	16 Aug 22	16	33 d...	100 Jane Sir
18	16 Aug...	16 Aug 22	17	0 days	0
19	2 Jun 21	4 Oct 22	12	350 ...	14
20	2 Jun 21	19 Jul 21		34 d...	100
21	17 Aug...	4 Oct 22		35 d...	0
22	17 Aug...	3 Oct 22		34 d...	0
23	17 Aug...	30 Sep 22		33 d...	0
24	17 Aug...	30 Sep 22		33 d...	0
25	17 Aug...	3 Oct 22		34 d...	0
26	17 Aug...	4 Oct 22		35 d...	0

Right clicking on a task in the gantt screen brings up an entire menu.

Add colours to tasks to represent a team member, area of work etc

Assign or reassign resources to the task or multiple tasks by holding *shift*

When you change the Gantt zoom, this is remembered for printing

Use the search bar at the top of the task list to find tasks quickly

Open the task 'Edit' screen to add additional information such as constraints

Quick update the status or send an update request by email

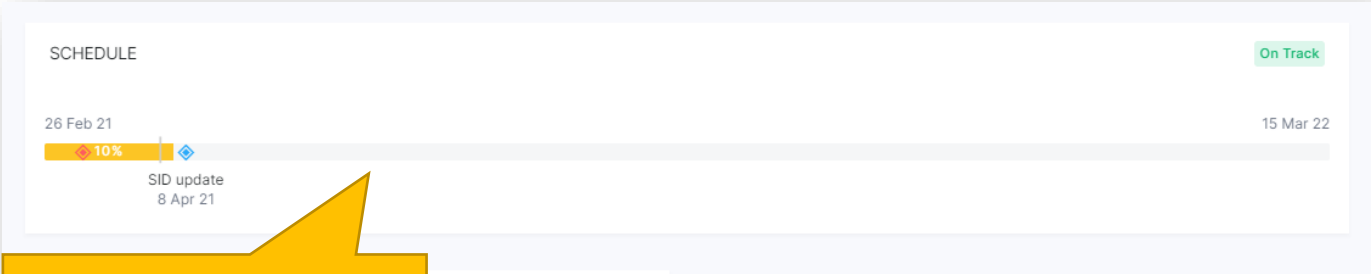
Split the task if it is part completed but now needs to be deferred to a later date

Move tasks to another project

Delete tasks no longer needed / duplicated / re-written

Click an item in any column to be able to quickly make changes

Health Indicators (RAG)



The project schedule health will begin updating once your project state is set to 'Active'

For every project and task, Celoxis automatically calculates its projected finish date based on the current rate of progress once a day. It is the date on which the project or task is likely to finish based on the current rate of progress



A project or task is 'At Risk' when you are likely to pass the planned finish date.
A project or task is off track if you have already passed the planned finish date

Enable Seven Day Weeks

Our Dorset

Workload

Resource > Project > Work Item

Optimal Underallocated Overallocated
Exception Non Working

	Aug																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Heather Payne	54.46	54.46	54.46	54.46	54.46				54.46	54.46	46.46	46.46	46.46			46.42	42.4
Celoxis launch & rollout	22.24	22.24	22.24	22.24	22.24				22.24	22.24	22.24	22.24	22.24			22.24	18.2
DHC IT - MG Reporting TEST	8	8	8	8	8				8	8							
Good CoP 2021	8.22	8.22	8.22	8.22	8.22				8.22	8.22	8.22	8.22	8.22			8.18	8.18
PMO Intranet Revamp	16	16	16	16	16				16	16	16	16	16			16	16
Total	54.46	54.46	54.46	54.46	54.46				54.46	54.46	46.46	46.46	46.46			46.42	42.4

In the left hand menu, select *Workload*

Click on the relevant day to make it a working or non-working day, or to change the working hours for a day

Workload

Resource > Project > Work Item

Optimal Underallocated Overallocated
Exception Non Working

	Aug																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Heather Payne	54.46	54.46	54.46	54.46	54.46				54.46	54.46	46.46	46.46	46.46			46.42	42.42
Celoxis launch & rollout	22.24	22.24	22.24	22.24	22.24				22.24	22.24						22.24	18.24
DHC IT - MG Reporting TEST	8	8	8	8	8												
Good CoP 2021	8.22	8.22	8.22	8.22	8.22											8.18	8.18
PMO Intranet Revamp	16	16	16	16	16				16	16	16	16	16			16	16
Total	54.46	54.46	54.46	54.46	54.46				54.46	54.46	46.46	46.46	46.46			46.42	42.42

Make Non-Working Day

Make Working: 8 AM - 12 PM, 1 PM - 5 PM


Advanced

If you need longer term changes to your working patterns for tasks, please contact the Transformation Team

FAQs

How can I reassign tasks if my team member is no longer working on the project?

- Right click on the task in the Gantt screen > Add resource > Replace a resource. If you are assigning multiple tasks to a new team member, highlight all the relevant tasks and follow the same steps.

Remember, you can print from almost any screen, including the Gantt. To see how to print, visit the [Getting Started Guide here \(Ctrl + Click\)](#) 

Why are my project health indicators not showing?

- Check that your project state is 'Active'. Health indicators do not show in 'Draft' state

I made some changes but my status calculations have not changed.

- Click the 'Recalculate Projections' button under the 'More' button to update status

How can I add a new user?

- Please contact the PMO to add a new user (PMO@dorsetccg.nhs.uk)

Is there more training available for myself or my team?

- Contact the PMO to discuss your training and user needs, or alternatively join our [Teams channel](#) where we post all our updates

How can I assign the colour?

- Celoxis does not currently support a key for colour coding. You will need to create a key and save somewhere

Remember, you can use the 'Demo & test' workspace to practice and get used to the system