

GanttPulse

User Guide & Manual

Team project management, Gantt timelines, and AI-assisted planning

Version 1.8.1

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GanttPulse — User Guide & Manual
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The screenshots in this guide were taken from GanttPulse with sample data. Depending on your edition (Company, Desktop, or Browser), role, license tier, and theme, your screens may differ in detail.

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Document Revision History

Revision	Date	Description
1.0	July 13, 2026	Initial release. Covers GanttPulse 1.7.0 — all editions, roles, and Pro features.
1.1	July 13, 2026	Added the manager Quick Start walkthrough (Chapter 2). Teamwork-coverage audit fixes: concurrent-edit behavior, Monday Brief email digest, assignee & over-allocation chips on the Gantt, team-dialog and desktop-edition details.
1.2	October 29, 2026	The manual is now generated from the in-app Help & Guide, after a full audit of both against the code (128 corrections, ~100 new topics). New chapters: Start Here, the Claude Code Connector, When Something Goes Wrong (every message the app shows). Plans, licensing, sign-in, viewers and the permission matrix brought up to date.
1.3	October 30, 2026	Updated for GanttPulse 1.8.0. A summary task reads In Progress as soon as any child has started, even one still at 0%.

1.4	October 30, 2026	Claude Code connects from Settings (login editions): the Connect button, Claude's own file claude.db, and Claude's projects on the free plan - no caps, view-only for people, with the new wall message in When Something Goes Wrong.
1.5	October 30, 2026	Claude Code chapter: the free-plan lock on Claude's projects as shipped - the page looks as it does to a viewer, with one toolbar notice and the portfolio menu's Edit Claude's project… item opening the upgrade dialog.
1.6	October 31, 2026	The Hours view (press 4): when work really happened, hour by hour, with the Actual hours column and the Days rule for work done on non-working days. Claude's file (claude.db) now comes from the sign-in screen's Project list and Connect Claude Code works only there; the Gantt in a VS Code tab opens signed in; Sign in without passwords hides the password box; the connector's setup names the VS Code extension.
1.7	October 31, 2026	The Hours view reaches 30 days back and 30 days ahead; a task further off has no bar there.
1.8	November 1, 2026	Updated for GanttPulse 1.8.0: a shared copy leaves out the email sign-in and AI keys as well as the API tokens.
1.9	November 1, 2026	Updated for GanttPulse 1.8.0: Hide app bars for a small window or the Gantt in a VS Code tab (View > Hide app bars, the header button beside Fit to screen, Ctrl+Shift+Space; the thin strip at the top brings the bars back) with the one-line Gantt toolbar; the app zoom from the header (50% to 200%, Actual size; Fit to screen is its 90% step); View > Show lists every chart hide/show and the View menu holds the app's own bars.
2.0	November 2, 2026	Updated for GanttPulse 1.8.0: Connect Claude Code asks no password (the key works on this PC only) and Claude's file, claude.db, leads with it on its first screen; the timeline mini-map follows its own switch when the app bars are hidden.
2.1	November 2, 2026	Updated for GanttPulse 1.8.0: Ctrl + = / Ctrl + - / Ctrl + 0 zoom the app from the keyboard, as in VS Code and the browsers; the View > Zoom items name the keys.
2.2	November 4, 2026	Updated for GanttPulse 1.8.0: Claude's marks on the chart (Working now, Waiting for you, Blocked, Stopped) and the Hours and tokens switch; By Status as the default progress colour and Faded remaining part; a cancelled subtask is left out of its summary's progress.
2.3	November 4, 2026	Updated for GanttPulse 1.8.0: the divider stops where you leave it and goes to the window's edge; the task list in a small window (the Name column's default, the whole name on hover, the Move column, a right-click on the header, Ctrl+\ folds the list); in Claude's file every plan nests freely.
2.4	November 6, 2026	Updated for GanttPulse 1.8.0: Fit to screen is gone from the header and the View menu (the zoom and Hide app bars give the room); the divider follows the hand all the way to the left edge; a step brought onto the screen lands in the middle of the view; the Not answered mark for a chat that ended with its question open; the soft Waiting on mark for a step that waits on something else; the Markers button in the filter row shows or hides each marker, Claude's marks too, and lights the kinds on the chart now; the rail's Help & Guide entry is an icon.
2.5	November 6, 2026	Updated for GanttPulse 1.8.0: the Markers button filters the chart to the tasks with the markers you tick; the Gantt always opens on Split, and a small window shows no view switch; the folded menu has an arrow under the logo to widen it.
2.6	November 8, 2026	Updated for GanttPulse 1.8.0: the AI Usage page, with its own chapter: Claude Code's tokens and what they are worth, in Claude's file, on Pro.
2.7	November 9, 2026	Updated for GanttPulse 1.8.0: the AI Usage page's savings coach, Top steps, and the All work, With a Gantt task and No task switch.

2.8	November 9, 2026	Updated for GanttPulse 1.8.0: the AI Usage page's cards that open, its Filters button and tables that sort by any column.
2.9	November 12, 2026	Updated for GanttPulse 1.8.0: a Gantt item is a task everywhere, also for Claude Code's work (Top tasks, Per task); the AI Usage numbers under the total say what they are and what their change compares with. Every page fits any window: My Tasks, the Magic Overview, Projects, Team and Workload keep their title, tiles and toolbar on one line each and show the fullest form that fits (words give way to icons, then buttons move under More, View, Views or a ... button that lists the same actions), and the app header keeps the project and page names readable (Import, Export, Undo, Redo and History leave first; each is in the top menu, the undo history now also as Edit > History). The Magic Overview's chart is drawn sharp at every zoom, with a names column that lists each phase's tasks beside their bars, a date axis that follows the zoom, and the Story panel behind the toolbar's Story button. Projects shows the coming milestones as the chips that fit and a +N more button; on Workload a cell's list of tasks opens above the cell when there is no room below. New pictures of the five pages.
3.0	November 13, 2026	Updated for GanttPulse 1.8.0: the theme (Light, Dark, System) is a list of the View menu, no longer of Tools; in a narrow window the title bar's Menu button lists the menus' names and each opens in place. The Magic Overview has no full-screen button: Hide app bars gives the room, and Present still covers the window while its deck is open. On the free plan the chart follows Claude's own work by itself: a change to a task's dates, length or description asked of the chat needs a paid plan, as editing Claude's projects by hand does, and the refusal has its row in When Something Goes Wrong. New pictures of the Magic Overview and the Dashboard.
3.1	November 15, 2026	Updated for GanttPulse 1.8.0: seven new rows in When Something Goes Wrong, each with its cause and what to do. For the license: the PC's date is set back; the PC's hardware ids could not be read; a browser too old to check the license key (the Day, Month and Hours views, swimlanes, 3D, advanced filters, automatic scheduling and the Magic Overview stay locked in it until the browser is updated). For the program and its files: a file in the program folder that is not part of GanttPulse; Setup refusing a folder that already holds other files; a window GanttPulse could not confirm as yours; a file window that did not open.
3.2	November 16, 2026	Updated for GanttPulse 1.8.0: on a PC that does not let GanttPulse open its file window (a company's settings can block Windows PowerShell), Open project file, New project file, Save As, Share a copy and Merge returned copy now say so, each with what can be done from there. In When Something Goes Wrong: that row is rewritten, a row for a file choice whose answer was lost is added, and the row on a window that could not be confirmed says how the first account is made on such a PC and what an account without a password needs.
3.3	November 16, 2026	Updated for GanttPulse 1.8.0: the app shows that it is working on a file. While the window for choosing a file is open, the place that was clicked says Opening the file window… (the title bar for the File menu, the button in Share a copy and Merge returned copy, the Project list on the sign-in screen), and from the moment a file is chosen the whole window says Opening your project… until it has reloaded. A file window left open for 10 minutes closes by itself: a new row in When Something Goes Wrong says why and what to do.
3.4	November 18, 2026	Updated for GanttPulse 1.8.0: a Gantt or a Workload whose list could not be loaded says so, asks again by itself and offers Try again, with a new row in When Something Goes Wrong that says why and what to do. The row on Too many requests names the installed app's limit: 1,200 requests a minute for all the pages of one PC.
3.5	November 21, 2026	Updated for GanttPulse 1.8.1: a paid license key is one year of updates, and the version keeps working after it (the License tab names the day Updates until and says what happens near it and after it); a key longer than one year is refused; Start GanttPulse in the VS Code tab opens Claude's file; Claude's file's first screen no longer offers a project by hand; Claude's workers have a section of their own on the Team page and no longer fill the lists of people; Claude's key may rename a project Claude made.

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About This Manual

GanttPulse is a team project-management application built around an interactive Gantt timeline. This manual explains every page and feature and how to use it, for **managers**, **team members**, **viewers**, and **administrators**.

How this manual is organized

The guide is grouped into parts, from first sign-in through day-to-day project work, team and workload management, the analytics and AI views, and finally configuration, administration, and reference material. If you are new, read Part I first. Otherwise, use the Table of Contents to jump to a topic.

Conventions used

- **Bold** text marks a button, menu item, field, or on-screen label.
- Navigation is written as a path, for example *Sidebar → Manage → Team*.
- A role in parentheses — (Manager), (Member), (Viewer), (Admin) — marks behavior specific to that role.
- Features marked **(Pro)** require a Pro license. On the free tier they show an upgrade prompt or a preview instead.

Callout boxes flag important asides:

> **Tip** A shortcut or best-practice that saves you time.

> **Note** Extra context worth knowing.

> **Warning** Something that can cause data loss, confusion, or an irreversible change.

> **Pro** A capability that is part of the paid Pro tier.

> **Note** This manual describes GanttPulse version 1.8.1. Your screens may differ slightly depending on your edition (Company, Desktop, or Browser) and whether a Pro license is active.

Part I — Getting Started

1. Start Here

Your first ten minutes as a manager, a member or a viewer, in the order things happen, with the exact buttons to click.

Manager: Your First Project

- **Set the calendar once.** Settings > Calendar: the working days and the holidays. Durations and the cascade count working days from then on.
- **Add your people.** Team > Add Team Member. A member gets a login; a contractor is a name you plan work for with no login and no seat; a viewer can only look. On the free plan the roster holds 3 seats; viewers and contractors are free.
- **Create the project.** Projects > New Project, or on an empty workspace the Gantt's Create your first project. Generate a sample project gives you a filled plan to explore instead.
- **Add tasks.** On the Gantt press **N** or click New Task; a task needs only a name. Press **Tab** on a row to make it a subtask of the row above.
- **Put them on the calendar.** New tasks start today; drag a bar to move it, drag its edge to stretch it, or type dates in the list. Switch Day / Week / Month with **1**, **2**, **3**.
- **Link what depends on what.** Drag from the circle at a bar's end onto another task. On Pro, moving a task then moves what follows it.
- **Assign the work.** Double-click a task's name to open it and pick assignees; each carries a work-%, which is what the overload warnings add up.
- **Freeze the plan.** Baseline > capture a baseline. From now on the chart can show what slipped.
- **Watch it move.** The badges above the toolbar count conflicts and overdue tasks; the bell collects what changed; the Dashboard (Pro) shows the health score.
- **Keep it to 1 project and 15 tasks on the free plan,** or activate a key under Settings > License.

> **Tip** Take the tour below: it points at the six controls this list uses, on the real Gantt.

Member: Your First Day

- **Sign in** with the username (or email) and password your manager gave you. You land on My Tasks (Pro) or the Gantt.
- **Find your work.** My Tasks lists everything assigned to you across projects; on the Gantt the My Tasks filter toggle does the same for one project.
- **Update it.** You can edit the tasks you own and the tasks assigned to you: progress, status, dates, notes. Click a cell in the list to edit it in place; double-click the name for the full window.
- **Create your own tasks.** New Task works for members too; you can pick same-team assignees while creating a task, and a manager changes assignments after that.
- **Talk on the task.** Every task has a comment thread; @ mentions notify a teammate.
- **Tell the plan when you are away.** Profile > Time Off; the workload engines treat those days as zero capacity.
- **Watch the bell.** Assignments, mentions and due-soon reminders arrive there, on every device.

Viewer: Your First Look

A viewer sees the whole plan and changes nothing. Start on the Gantt: switch Day / Week / Month, filter and search, hover a bar for its details, follow the dependency arrows, turn on Critical Path Mode for what drives the end date, and open any task to read its fields and comments. The Dashboard and Magic Overview (Pro) give the summary view. You can change your own profile, password and notification preferences, and you can ask the AI assistant questions; anything it would change is refused. For an edit, ask a manager or the task's owner.

Where Things Are

- **Sidebar:** the pages. Views (Dashboard, My Tasks, Gantt, Magic Overview) for everyone; Projects, Team and Workload for managers; Settings at the bottom.
- **Header:** the project name, Import / Export (Pro), Undo / Redo and the History clock, the AI assistant (Pro), the bell, the zoom, Hide app bars, theme and your account menu.
- **Toolbar (Gantt):** view mode, Today, the display toggles, markers, 3D, Filter, zoom, the status badges, the pane cycle, Baseline and New Task.
- **Help: Ctrl+/** on every page, Help & Guide at the foot of the sidebar or in your account menu, and on the sign-in page the round ? button. This Page explains where you are; Guide lists every page and feature; Keys lists the shortcuts.

2. Editions, Installation & Project Files

Install as an App

Run GanttPulse in its own window, without the browser's address and bookmark bars, and how that differs from the desktop edition.

Install GanttPulse as an app

GanttPulse ships a web app manifest, so Chrome and Edge can install it like a desktop program. Use your browser's install action (Chrome and Edge put it in the address bar or the main menu; the wording differs by browser and version) and the app gets its own window and its own icon in the taskbar or Start menu.

There is nothing to switch on inside GanttPulse first. The manifest is part of every build and is served to everyone, so installing needs no license key, no setting, and no particular role. It changes nothing for your teammates either: it changes how YOUR browser presents the app, not the app or its data.

> **Tip** Where the install control sits depends on your browser and its version. Look in the address bar or the browser's main menu for the browser's install action.

> **Tip** Installing does not create a second copy of your work. The installed window loads the same app from the same server as the tab you were using.

What changes once it is installed

The manifest asks for display mode "standalone", which is what removes the browser furniture:

- The app opens in its own window with no address bar and no bookmarks bar. That is the only chrome-free presentation a web page can offer short of fullscreen.

- The window opens at the app root, the same place as loading the site normally, so you land on your usual start page.
- The 192 px and 512 px app icons become the taskbar and Start menu icon.
- The manifest declares a dark background and theme color (#0f172a) for the window and its startup screen.

Inside the app, nothing changes at all. No screen, permission, or feature behaves differently in an installed window, because no GanttPulse code checks whether it is running installed. Same pages, same account, same data, same free or Pro plan.

> **Tip** The dark color in the manifest belongs to the browser's window, not to the app. Your Light, Dark, or System choice in Settings > Appearance still decides how GanttPulse itself looks.

> **Tip** Because the installed window is the same app, a teammate looking at a browser tab sees exactly what you see.

It still needs the server (there is no offline mode)

Installing does NOT make GanttPulse work offline. The build registers no service worker, and a service worker is the piece that would cache the app for offline use. The installed window fetches everything from the same server as an ordinary browser tab.

So if the server is unreachable, the installed app fails exactly the way the tab would. Treat the install as a window without browser furniture, not as an offline copy.

If you actually need someone to work with no connection, that is a different feature: the desktop login edition hands a teammate a copy of the file to edit offline and merges their changes back. See the Sharing & Offline Collaboration topic.

> **Tip** A blank or erroring installed window almost always means the server is down or unreachable, not that the install is broken. Open the same address in a normal tab to confirm.

Installed web app vs the desktop edition

These are two different things that produce a similar-looking window. Do not confuse them.

Installed web app: you install it from Chrome or Edge, on top of whatever GanttPulse server you already use.

Desktop edition: a Windows installer that puts GanttPulse in your Start menu (with an optional desktop shortcut) and runs the whole thing on your own machine. Launching it starts a local server on 127.0.0.1 and then opens the app for you, so there is no browser menu step at all. In detail:

- It launches Chrome, or Edge when Chrome is not installed, in Chromium's app-window mode. That window already has no address or bookmarks bar, which is exactly why the desktop edition needs no install step.
- It uses a dedicated browser profile stored in the app's own data folder, kept apart from your personal browser profile, its history, extensions, and password manager. Because that folder persists, your sign-in survives restarts.
- It saves the port it used and reuses it on the next launch while that port is still free, so the app's address normally stays the same; if another program has taken it, a fresh port is picked and saved instead.
- It runs in the background behind a tray icon. The tray menu is deliberately small: the current project, Show GanttPulse, Open logs folder, and Quit GanttPulse. There are no file actions in the tray; those live in the app's own File menu.

- Show GanttPulse raises the window you already have open instead of adding a second one.

If no Chromium browser is found on the machine, the desktop edition falls back to opening GanttPulse as an ordinary tab in your default browser.

> **Tip** Addresses: a desktop edition answers only on this computer, at http://127.0.0.1: (the port is picked at launch and kept while it stays free; the tray icon opens the right one). The company edition is reached at your server's name or address on port 3001, unless your administrator changed the port.

> **Tip** Already running the desktop edition? There is usually nothing to install - it launches its own window without browser bars when Chrome or Edge is present.

> **Tip** Using GanttPulse at a normal web address in a browser tab? Then installing is what gets you that same chrome-free window.

> **Tip** Installing the web app does not give you the desktop edition. Only the desktop edition runs its own local server and tray icon.

The desktop installer: install, update, uninstall

The login edition installs as **GanttPulse Login**, with its own Start menu entry and uninstall entry, so it sits beside any other edition. The wizard offers **Create a desktop shortcut** and ends with **Launch GanttPulse now**. On the Installing page a **Show details** button (then **Hide details**) lists what is being copied, starting with "Installing to ".

Updating is running the newer installer over the old install; your data is untouched. The installer refuses to go backwards: "GanttPulse Login is already installed. This installer has an older version (). Installing an older version over a newer one could make your projects unreadable, so Setup will close without changing anything."

The app lives in the tray, so it is often still running when the installer starts. The installer closes it for you; when it cannot, it says: "GanttPulse is still running and could not be closed automatically. Right-click the GanttPulse icon in the system tray (next to the clock), choose Quit, then run this installer again."

Uninstalling removes the install folder only. Your project files, the default workspace, the license and the logs stay where they are (the app's data folder under your user profile), with no question asked, so a reinstall finds everything again.

> **Tip** After the first launch the window can take a while to appear: the engine is given 90 seconds, extended to 300 seconds while it is alive but slow, and a first boot under an antivirus scan often needs it. Nothing is shown during the wait.

> **Tip** The window opens maximized, in Chrome or Edge's app mode. The tray icon appears as soon as the engine answers.

Project Files (Desktop)

How the desktop editions store your work in a project file you choose, how to pick or create one at sign-in, and what switching files does to your session.

Your work lives in a project file

In the desktop login edition your whole workspace is a single project FILE on your own machine, saved with a .db extension. Each file carries its own accounts, its own team and its own projects, so an account in one file means nothing in another.

The middle of the desktop title bar shows GanttPulse followed by the name of the file you have open (the file name without the .db), so you can always tell which one you are working in.

New files are offered in your Documents folder, under GanttPulse Login, but you can save them anywhere. If you type a name without .db, the app adds it for you.

Every install also has a default workspace, the file the app opens on its very first launch: %USERPROFILE%\GanttPulseDesktop Login\workspace.db. That folder is the app's own data folder; it also holds the license and the logs subfolder.

> **Tip** Company and web editions have no project files: there is one shared database and no Project dropdown on the sign-in screen.

The free plan: one file, the workspace

On the free plan the app works in its default workspace only; the demo stays open to it. Everything that reaches another file carries a Pro chip and opens the **More Project Files** upgrade dialog, which reads: "Keep separate project files: create new ones, save copies, and open files from anywhere. The free plan works in its default workspace; the demo project is always there." The server refuses the same actions with "The free plan works in its default workspace. Opening, creating or copying other project files needs Pro."

Where you meet it:

- The title bar's File menu: New project file..., Open project file..., Save As... and any other file under Recent files.
- The sign-in screen: picking another file or a new one shows the toast "Other project files need Pro" with that sentence.
- An app that starts on another file (one opened before a Pro key lapsed, say) shows a notice on the sign-in screen: "" needs Pro, "The free plan works in its default workspace. This file stays on disk and opens again with Pro.", with an **Open my workspace** button. Signing in there is refused with "This project file needs Pro: the free plan works in its default workspace. Open your workspace to sign in."

Share a copy of this file... and Merge returned copy... stay available on the free plan: the copy and the merge are the sender's own actions, not another file to work in.

> **Tip** Nothing is deleted or locked: the other files stay on disk and open again the moment a plan with project files is active.

> **Tip** To look at the demo on the free plan, sign out and pick Demo Project in the sign-in screen's Project dropdown; it is never listed under Recent files.

The Project dropdown on the sign-in screen

The desktop sign-in screen has a Project dropdown above the User / Email field. It decides WHICH file you are signing in to. Open it and you get:

- the file that is already open, marked (current)

- your recently opened files, most recent first (the app keeps the last 8 files it opened, counting the one you are in and the demo, which are listed separately, so up to 7 others appear here)
- Demo Project, marked (demo), when the bundled demo file exists and is not the one already open
- Open project file..., which opens the standard Open dialog so you can browse to any file
- New project file..., which opens a Save dialog so you can choose a folder and a name for a brand-new file

Picking an item only sets the target. Nothing is opened, created or switched until you press the button at the bottom, which reads Sign In, or Create project when you picked a new file. On the free plan the app works in its default workspace: only that workspace and the demo can be signed in to from here, and picking another file or a new one is refused with a notice that other project files need Pro.

> **Tip** A recent file that has been deleted or moved simply drops off the list: only files that still exist are offered.

> **Tip** Browsing with Open project file... and then changing your mind is free. The file is not touched until you press Sign In.

Start a new project file

Choose New project file... in the Project dropdown, pick where to save it and name it (Untitled is offered, and .db is added if you leave it off). The dropdown then shows that name with (new), the heading changes to Create project, and the button reads Create project.

Fill in the name you want to sign in with and a password of at least 4 characters. The first person to sign in to an empty file becomes its Manager, so those are the credentials you are creating for yourself. The identifier can be a plain name (for example admin or sarah) or an email address; if it contains an @ it has to look like a real address.

The file is created only once those are accepted, so cancelling, or a name or password the app rejects on the spot, leaves nothing behind. A malformed email is checked later by the server, once the file exists, so that one can leave a new empty file you will need to delete yourself. Enter a username., Password must be at least 4 characters. or Could not create the project file there. means nothing was created.

> **Tip** The password rule here is the relaxed desktop one (at least 4 characters, no complexity requirement), because the file lives on your own machine.

> **Tip** This creates a new project FILE, a separate document with its own accounts. To add a project inside the file you already have open, use the Projects page (Manager only).

The demo project

When the bundled demo file is installed and is not the file already open, the Project dropdown lists it as Demo Project (demo).

Selecting it fills the form with the demo manager account for you, and a note appears naming the member account and the shared password: manager@local for the manager, alice@demo.local for a member, both with the password 0000. Choosing a different project again clears those filled-in credentials.

The demo is an ordinary project file with its own accounts, so you sign in to it exactly like any other file, and you leave it the same way: pick another project from the dropdown, or switch from the File menu once you are inside.

> **Tip** If the demo is already the open file it is not listed separately; it simply shows as the current project.

Signing in also opens the file

If the project you picked is not the one already open, Sign In does both jobs in one press. The app restarts on the chosen file and the window reloads, and the credentials you typed finish the sign-in on the other side, so you never type them twice.

The button shows Signing in… (or Creating project…) for the whole of it, and the reloaded window covers itself with Opening your project… instead of showing you the sign-in screen a second time.

If the file cannot be used you stay on the form with the reason, for example That project file is missing or not a GanttPulse project., and nothing is switched.

> **Tip** A restart takes a moment. The spinner staying up is normal, and it deliberately does not clear until the new project has taken over the screen.

Switching files while signed in

You do not have to sign out to work in another file. The desktop title bar's File menu opens project files:

- New project file… - pick where to save a brand-new file. It is created with YOU as its Manager and you are taken straight into it, with no sign-in screen.
- Open project file… - browse for an existing file.
- Recent files - the files you opened before. The submenu is greyed out when there are none.

Any of these restarts the app on that file and reloads the window. On the free plan the app works in its default workspace: New project file…, Open project file…, Save As… and any other file under Recent files carry a Pro chip and open the More Project Files upgrade dialog instead, while Share a copy of this file… and Merge returned copy… stay available. The File menu appears only once you are signed in; before that, the sign-in screen's own Project dropdown does the same job.

> **Tip** A file that is damaged, or that is not a GanttPulse project, is refused: the app says so and keeps your current project open.

> **Tip** If a new file cannot be created you get a Couldn't create project message and stay exactly where you are.

> **Tip** While the window for choosing a file is open, the title bar says Opening the file window… and the File menu waits for it. Once a file is chosen, the whole window says Opening your project… until it has reloaded on that file. A file window left open for 10 minutes closes by itself, and a message in the app says so; choose again.

> **Tip** Viewers can open and switch project files, but cannot create one or use Save As: the File menu hides both entries for them, and the server refuses them too.

> **Tip** The same File menu also holds Save As..., Export..., Import... (managers), and, for managers in this edition, Share a copy of this file... and Merge returned copy.... Those are covered under Sharing & Offline Collaboration.

What happens to your session when you switch

Before it switches, the app asks the target file whether it holds an account for the email or username you are signed in with.

If it does, your session is carried over: the window reloads and you are signed straight back in as yourself, with no password. Your role comes from the file you just opened, so you can be a Manager in one project file and a Member in another.

If it does not, the app stops and asks first. The dialog is titled Sign out to open (project name)? and explains that the project has no account for you, that each project keeps its own accounts, and that your current work is already saved. Stay here cancels and leaves you where you were. Sign out and open goes ahead: that file opens and its own sign-in screen appears, where you sign in with an account that exists there.

The check is a courtesy, not a gate. If it cannot run, on an unreadable file for example, the app opens the project anyway rather than refusing.

> **Tip** This warning is only for switching from inside the app. On the sign-in screen you are typing credentials for the file you picked anyway, so there is nothing to warn about.

> **Tip** To get into a file where you have no account, ask that file's manager to add you to its team, then sign in to it.

The tray icon

In the edition that runs in your browser with a tray icon, the tray menu is deliberately small. The name of the open project file sits at the top, then:

- Show GanttPulse - brings the app window to the front, and opens one if none is open
- Open logs folder - opens the diagnostic logs folder, for when support asks for them
- Quit GanttPulse - stops the app and exits

Clicking the project name at the top does the same as Show GanttPulse. Hovering the icon shows GanttPulse followed by the open file's name.

There are no file actions in the tray. Creating, opening and switching project files all happen inside the app: on the sign-in screen's Project dropdown, or in the File menu once you are signed in.

> **Tip** Open logs folder opens the logs subfolder only, not the folder holding your project files.

A damaged or missing file

A project file is never deleted or overwritten by the app when it cannot be read; it is refused or moved aside, and you are told which.

- Switching to a file from inside the app: "That project file is damaged or is not a GanttPulse project. Keeping the current one open." Nothing changes.

- A switch that failed half-way: "That project could not be opened - your previous project was restored." If even that failed: "GanttPulse could not open that project, and could not restore the previous one. Please relaunch the app."
- At launch, when the last file you had open is gone or unreadable: "Your last project could not be opened - it may have been deleted, moved, or damaged. Your workspace was opened instead."
- At launch, when the default workspace itself is damaged: it is renamed to workspace.damaged-.db (a -2, -3 suffix when that name is taken) in the same folder and a fresh empty workspace is created. The message reads "Your workspace could not be opened - it is damaged. It was kept as , and a new empty workspace was opened." A repair tool can often still read the kept copy.
- When the damaged workspace cannot be moved because another program holds it, the start stops: "The workspace is damaged and could not be moved aside to start a new one (). Close any program that has it open and start GanttPulse again."

Backing up a project file

There is no backup feature inside the app. A project file is one ordinary .db file, so a backup is a copy of that file: quit GanttPulse from the tray icon (Quit GanttPulse), copy the .db somewhere safe, and start the app again. Copying while the app is running can catch the file mid-write, which is why the quit comes first.

On a plan with project files, Save As... makes such a copy for you and the GanttPulse (.json) export keeps the plan itself; on the free plan both are Pro, so copying the .db is the way.

> **Tip** To restore, quit the app, put the copy back under its original name, and start again. The file you replace is the live one, so keep the damaged original until you have checked the restored copy.

The logs folder

The tray icon's Open logs folder opens %USERPROFILE%\GanttPulseDesktop Login\logs. The files in it:

- **server.log**: the engine's output for the current run, rewritten at every start
- **server.prev.log**: the previous run's server.log, kept so a restart does not erase the one run that held an error
- **startup-error.log**: written only when the app could not start, with the reason; the app opens it for you in Notepad
- **dialog-debug.log**: a trace of the file dialogs and project switches

Support will ask for these. They hold file paths and technical output, not your project data.

When the app does not start, or stops

The engine is a local server the tray starts on 127.0.0.1. Its failures have fixed wording:

- "GanttPulse could not start: " is the launcher's message when the tray process itself could not be started.
- When the engine fails during startup the reason goes to startup-error.log, which opens in Notepad. "Could not determine a free port" means no local port was available. "Server process exited before becoming ready at - see server.log for its output" means the engine crashed while starting. "Server did not become ready within ms at " means it was still not answering after the wait: 90 seconds, extended to 300 seconds while the engine is alive but slow (a first launch under an antivirus scan is the usual cause). The app may show nothing at all during that wait.
- "GanttPulse's engine stopped unexpectedly. Your project is saved - please relaunch the app to continue." appears when the engine dies mid-session. The file is written in place as you work, so nothing is lost.

Starting the app while it is already running, or still starting, never opens a second copy on the same file: the second launch brings the existing window to the front and exits, with no message at all. If no window appears, look for the GanttPulse icon in the tray and use Show GanttPulse.

3. Signing In & Your Account

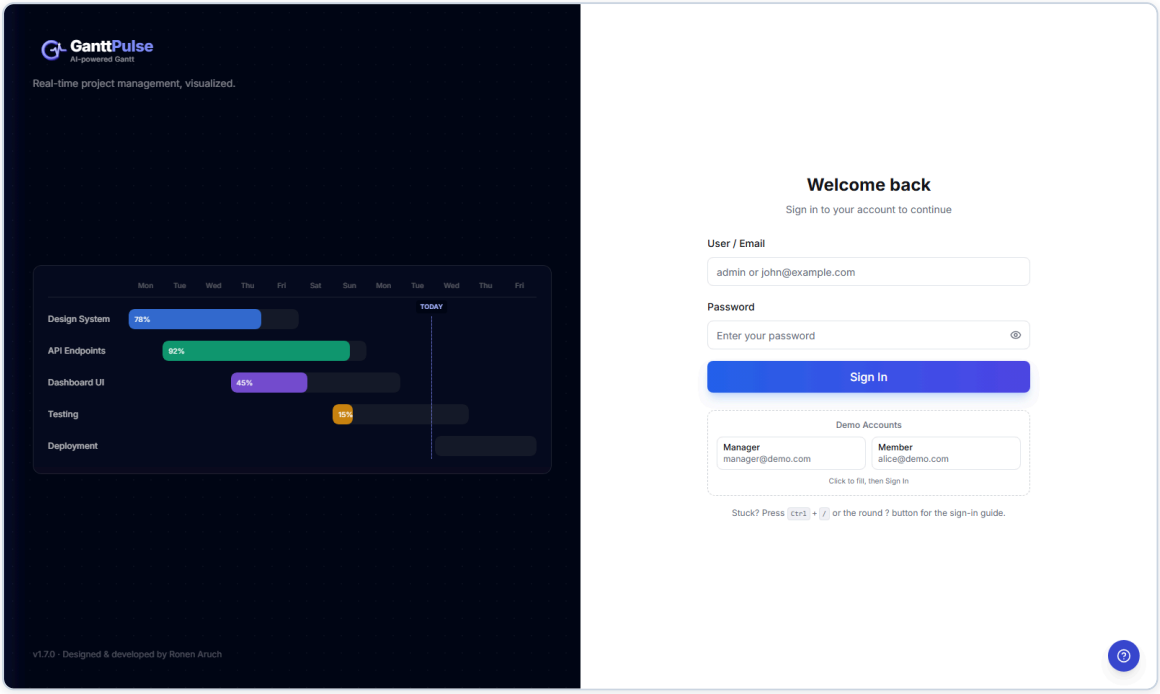


Figure 1 — The GanttPulse sign-in page.

Sign In

Sign in with your username or email and your password. In the desktop login edition you first pick which project file to open; on a fresh install the first sign-in creates the manager account.

Signing In

The User / Email field takes either your username or your email address; an account needs at least one of the two. Type your password and click Sign In. After a successful sign-in you land where you were heading (the page you opened, or the Gantt).

In the desktop login edition the heading reads Sign in to "" and a Project dropdown above the form picks the file; in the company edition the heading reads Welcome back and there is no dropdown.

A project whose manager turned on Sign in without passwords shows the people instead of the fields: click your name to sign in. A person who kept a password gets a password field first; Back or Escape returns to the list.

> **Tip** Press Ctrl+/ on any page, this one included, to open this guide. The Guide tab lists every page and feature.

First Sign-In: Creating the Manager (desktop login edition)

A brand-new project file has no accounts yet. The first person to sign in to it becomes its Manager, with whatever name and password they type:

- Pick New project file… in the Project dropdown and the heading changes to Create project: choose a username (any name or email) and a password of at least 4 characters, then click Create project.
- Tick Sign in without passwords to let everyone in this file sign in by picking their name; the password box then goes away and you sign in by your name too (add a password later on your Profile page if you want one; Connect Claude Code needs one). Anyone who can open the project can then sign in as any member, so use it on your own PC or with people you trust. The Team page can turn it off later.
- On a fresh install the default workspace works the same way even though the heading still reads Sign in: the first sign-in creates the manager account.

Every other person is added by that manager on the Team page; they sign in with the username (or email) and password the manager gave them.

Choosing the Project File (desktop login edition)

The Project dropdown lists the current project file, your recent files, the Demo Project, Claude's file (claude.db), Open project file… to browse for one, and New project file… to start a fresh one. Each project file keeps its own accounts, so you sign in to a file, not to the app.

Claude's file is Claude Code's own project file, where Connect Claude Code works. The first time you pick it, the heading changes to Create project and the file is made with a 7-day week, with you as its manager; after that it opens like any other file. The Claude Code Connector guide has the rest.

On the free plan the app works in its default workspace: other project files carry a Pro chip, and a file that needs Pro shows a "This project file needs Pro" notice with an Open my workspace button that takes you back to the workspace you can use.

The Demo Project

Pick Demo Project in the dropdown to look around a filled-in plan: the form fills in the demo manager account for you and names the member account you can try instead. The demo is a separate project file, so nothing you do in it touches your own work.

Forgot Your Password?

There is no self-service reset: ask a manager on your team.

- Company edition: the manager clicks Generate Reset Link on your row of the Team page and sends you the link. It opens the Set Your Password page, lasts 15 minutes and works once.
- Desktop login edition: the manager types a new password for you directly.

A new member's invite link (from Add Team Member or Resend invite) works the same way and lasts 7 days.

Why a Sign-In Is Refused

- Invalid email or password: the identifier or the password is wrong. It is also the answer when the account cannot sign in at all: a contractor is a name-only person with no login, and an account with neither username nor email cannot be matched.
- Account temporarily locked after repeated failed logins: five wrong passwords in a row lock the account for 15 minutes.
- Too many login attempts: more than five sign-in requests in 15 minutes from the same address, successful ones included. Wait a few minutes.
- Account is deactivated: a manager deactivated the account; only a manager can reactivate it.

A session lasts 7 days; after that, or after signing out, you land back here and return to the page you were on once you sign in.

Opening a File That Has No Account for You (desktop login edition)

Project files keep separate accounts. Opening a file that already has an account for you carries your session across with no password. Opening one that does not shows a Sign out to open…? dialog first: Stay here keeps your current session, Sign out and open closes it and shows that file's own sign-in form. Your current work is already saved either way.

Set Your Password

You reach this page through a link a manager sent you: a new member's invite, or a password reset. Choose a password here, then sign in with it.

Choosing a Password

Type the new password twice. It must be at least 8 characters and contain an uppercase letter, a lowercase letter and a number (up to 128 characters). The eye icon shows what you typed. The button stays disabled until both fields match and the rules are met.

Where the Link Comes From

- A new member's invite: created by Add Team Member or Resend invite on the Team page, emailed when the server can send mail, otherwise handed over by the manager. It lasts 7 days.
- A password reset: created by Generate Reset Link on your row of the Team page. It lasts 15 minutes and works once.

The desktop login edition does not use links: there the manager types a new password for you.

When the Link Does Not Work

- Invalid reset link: the address has no token; open the full link from the message.
- Invalid or expired reset link, or Failed to set password. The link may have expired.: the link was used already or is older than its lifetime. Ask your manager for a new one (Resend invite for a new member, Generate Reset Link for a reset).
- Too many password change attempts: three attempts per hour are allowed; wait an hour.

After Setting It

Password Set Successfully means the account is ready. Go to Login opens the sign-in form with your username or email already filled in; type the new password and sign in.

4. Getting Around: Menus, Palette & Appearance

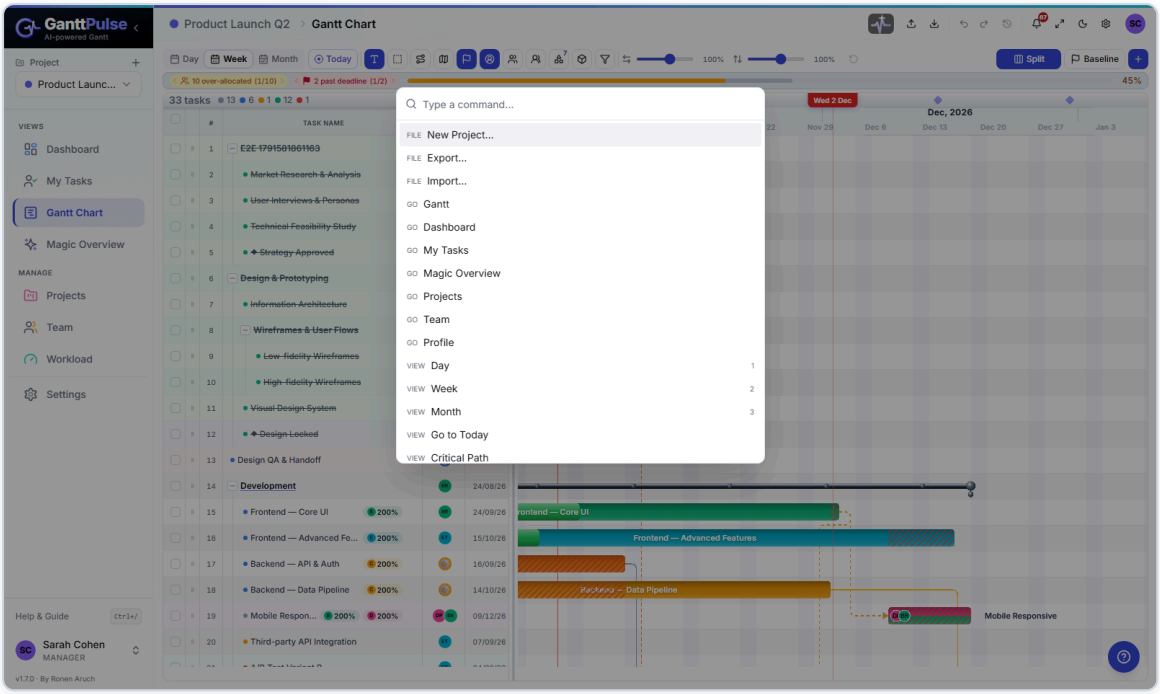


Figure 2 — The command palette (Ctrl+K) — search and run any command.

Menu Bar & Command Palette

The File/Edit/View menus, how to show or hide them, and the Ctrl+K palette that runs the same commands.

What the menu bar is

A row of desktop-style menus at the top of the app: File, Edit, View, Insert, Go, Team, Tools and Help. It adds nothing new. Every entry runs a control that already exists somewhere in the app, so you can pick an action from a menu instead of hunting for its button.

What you see in it depends on two things:

- Your role. Manager-only entries are left out for everyone else, and a menu whose entries are all left out is not drawn at all, which is why a member never sees the Team menu. Read-only viewers also lose Insert > New Task, and because that is the only Insert entry, viewers see no Insert menu at all.
- Your plan. Pro entries stay in the list with an amber Pro chip beside them, and they still answer when you pick them.

Entries that have a keyboard shortcut show it on the right of the row, a check mark marks the option currently in use, and an entry with nothing to act on is greyed out.

> **Tip** A whole menu missing from the row is normal: it means every entry in it belongs to another role.

> **Tip** Ctrl+K runs the same list of commands from a search box, with or without the menu bar.

Show or hide the menu bar

Open Settings > Appearance. The Menu Bar section holds one switch, "Show menu bar", which puts the menus next to the breadcrumb in the header.

- It is off by default on the web (cloud, Docker, LAN) and on by default in the installed editions, desktop and browser alike.
- The menus are drawn on wider screens only. A phone-width layout hides them.
- The choice is kept on this device and is not synced to your account, so switching it on here does not switch it on for you on another machine.
- The desktop editions draw the menus in the app's own window title bar instead of the header, and the switch controls them there too. In a narrow window the title bar shows one "Menu" button in their place: it lists the menus' names, a name opens its entries under it, and a submenu inside opens the same way. The title bar's File menu is the one exception: it stays put whatever the switch says, because it is the only route to your project files.

> **Tip** If the menus vanished after you resized the window, widen it: they are hidden below the tablet breakpoint.

File, Edit, View and Insert

- File: "New Project…" (managers) jumps to the Projects page and opens the new-project dialog. "Export…" opens the export dialog and "Import…" (managers) opens the import dialog. Both are Pro.
- Edit: "Undo" (Ctrl+Z) and "Redo" (Ctrl+Shift+Z). Each label spells out the action it will reverse, for example Undo Insert "Kickoff", and it greys out when there is nothing left to undo or redo.
- View: "Day", "Week", "Month" and "Hours" set the timeline scale and behave like radio buttons, with a check on the one in use. Day, Month and Hours are Pro, and open on every plan in Claude's project. "Go to Today" scrolls the Gantt timeline back to today. "Layout" picks Split (the task list and the bars side by side), List (the task list alone) or Timeline (the bars alone) on the Gantt on screen, with a check on the one in use, the same three views as the toolbar's Split / Timeline / List button, and in a small window too, where the toolbar has no such button; it is greyed on the other pages. "Horizontal zoom" and "Vertical zoom" set the Gantt's own zoom, the toolbar's two sliders: Wider / Narrower and Taller rows / Shorter rows step to the next level, and the levels 25 % to 150 % are listed with a check on the one in use. The "Show" submenu holds every chart hide/show as a checked toggle: Task labels, Summary frames, Critical path, Mini-map, Deadline flags, Assignees on bars, Dependency arrows, Weekend shading and Today line (the same switches as the Gantt toolbar and Settings > Display). The "Page zoom" submenu zooms the whole app in and out along the browser's steps or returns to Actual size. "Theme" is a submenu of Light, Dark and System with a check on the one in use, the same choice as Settings > Appearance. Then the app's own bars, each checked while on: "Hide app bars" (Ctrl+Shift+Space: the sidebar, the header and the title bar fold away for a small window; the thin strip at the top of the window shows them again), "Menu bar" (hiding it from here is fine: Ctrl+K and Settings > Appearance bring it back) and "Sidebar expanded".
- Insert: "New Task" takes you to the Gantt page and opens a blank task panel, the same panel the N key opens there.

> **Tip** Most shortcuts printed beside an entry work anywhere, but the single-key ones (N for a new task, 1/2/3 for the timeline scale) are listed for reference and only fire while you are on the Gantt page. The menu entry itself works from any page.

Go, Team, Tools and Help

- Go: "Gantt", "Dashboard", "My Tasks", "Magic Overview", then "Projects" and "Team" for managers, then "Profile". Dashboard, My Tasks and Magic Overview are Pro.
- Team: managers only, so members never see this menu at all. "Add Member…" opens the Team page with the add-member dialog already up, and "Manage Team…" opens the Team page.

- Tools: "AI Assistant" (Pro) opens the assistant chat. "Settings" is a submenu that jumps straight to a tab: Appearance, Calendar, Display, Notifications, Email, AI Assistant and License (the tabs themselves are titled "Email Server" and "AI"). The Email and AI entries are Pro and manager-only.
- Help: "Help & Guide" (Ctrl+/) opens this help panel, "About" opens the About tab in Settings, and "Upgrade to Pro…" is listed only while you are on the free plan.

> **Tip** Tools > Settings is the fastest route to any settings tab: it opens the page already on the tab you picked.

Pro entries never go dead

On the free plan a Pro entry is not greyed out. It keeps an amber Pro chip and still answers when you pick it:

- "Export…" and "Import…" open the upgrade dialog instead of the export or import dialog.
- "Day" and "Month" open the upgrade dialog, and the timeline stays on Week.
- Tools > "AI Assistant" opens the upgrade dialog instead of the chat.
- Go > "Dashboard", "My Tasks" and "Magic Overview" navigate to those pages, which show their own free preview.

The chip appears only once your license has finished loading, so a Pro user never sees one flash after a hard refresh.

> **Tip** The same chip and the same behavior apply in the Ctrl+K palette: a Pro command is searchable and runnable there too.

Ctrl+K runs the same commands

Press Ctrl+K (Cmd+K on a Mac) on any page to open the command palette. It searches the very same command list the menus are built from and adds nothing of its own.

- Type part of a command to filter it. Each row is tagged with the menu it came from, for example VIEW › Theme.
- Move with the up and down arrow keys, run with Enter, close with Esc or Ctrl+K again.
- Only commands you can actually run are listed, so a greyed Undo does not appear.
- The palette works whether or not the menu bar is switched on, which makes it the quickest route to these commands if you keep the bar hidden.

The one exception is the Magic Overview page, which keeps Ctrl+K for its own palette.

> **Tip** Searching matches the menu name too, so typing "view" lists everything in the View menu.

Desktop editions: the menus live in the title bar

The desktop editions draw their own window title bar across the top of the window, and that is where the menus sit. The title bar's own File menu comes first, then Edit, View, Insert, Go, Team, Tools and Help follow it. They appear once you are signed in, and Settings > Appearance > "Show menu bar" hides all of them except File, which stays because it is the only route to your project files.

The title bar's File menu is the one that works on project FILES on your disk:

- "New project file…" creates a new project file. This is not the Projects page's new project, which adds a project inside the file you already have open.
- "Open project file…" opens an existing project file.

- "Save As..." saves the open file to another location. See the Sharing and Offline Collaboration topic for what a copy does and does not carry.
- "Export..." and "Import..." open the same dialogs as everywhere else in the app. Import is managers only.
- "Share a copy of this file..." and "Merge returned copy..." are there for a manager in the login edition.
- "Recent files" lists what you opened recently and is greyed out when there is nothing in it. On the free plan the app works in its default workspace: "New project file...", "Open project file...", "Save As..." and any other file listed here carry a Pro chip and open the More Project Files upgrade dialog, while "Share a copy of this file..." and "Merge returned copy..." stay available.
- Editions with no sign-in screen also get "Open demo project".
- Read-only viewers do not see "New project file..." or "Save As...": both write a file, and the server refuses them for viewers too. Opening and switching files stays available to them.

The middle of the bar shows GanttPulse and the open file's name. In the Electron build the window buttons Minimize, Maximize (Restore while maximized) and Close sit at the right.

> **Tip** "New project file..." and the Projects page's new project are different things: one makes a new file, the other adds a project inside the open file.

> **Tip** "Recent files" is the title bar's list of FILES. The Projects page has its own recent row, which lists projects inside the file you have open.

Command Palette

One keystroke that searches and runs every command in the application menus, from any page.

Opening the Palette

Press Ctrl+K (Cmd+K on a Mac) on any page to open the global command palette: one search box that can run every command in the application menus.

- Press Ctrl+K again to close it, or press Esc, or click the dimmed area outside the box
- There is no button for it. The keystroke is the only way in, so it needs a physical keyboard
- It works even while the cursor sits in a text field. Most other shortcuts stand down while you are typing
- It does not need the menu bar. The palette is always there, whether or not "Show menu bar" is on in Settings > Appearance
- The one page it does not open on is the Magic Overview, which answers Ctrl+K with its own palette

The box shows "Type a command..." until you type, and the highlight starts on the first row. Every open starts with an empty search box.

> **Tip** The palette lives in the app frame, not on any one page, so it is available everywhere once you are signed in.

> **Tip** Ctrl+K is a toggle: the same keystroke that opened it closes it again.

What the Palette Can Reach

The palette runs the SAME command list as the application menu bar. It adds nothing of its own, so anything in the menus is here, and anything missing from the menus is missing here too. Each row prints the menu it came from (and its submenu) to the left of the label:

- File: New Project..., Export..., Import...
- Go: Gantt, Dashboard, My Tasks, Magic Overview, Projects, Team, Profile
- Edit: Undo and Redo, each labelled with the step it would reverse when the app knows it
- View: Day, Week, Month, Go to Today, Critical Path, Mini-map, and a Theme submenu (Light, Dark, System)
- Insert: New Task
- Team: Add Member..., Manage Team...
- Tools: AI Assistant and a Settings submenu (Appearance, Calendar, Display, Notifications, Email, AI Assistant, License)
- Help: Help & Guide, About, Upgrade to Pro...

A Go row simply navigates. A row that needs a particular page takes you there and opens the panel for you: New Task lands on the Gantt with a blank task panel open, New Project... lands on Projects with the create dialog open, Add Member... lands on Team with the add dialog open, and a Settings row opens Settings on that tab.

The grey key hint on the right of a row (for example Ctrl+Z next to Undo) is a reminder of the real shortcut, not something you press inside the palette.

> **Tip** Most rows that end in "..." open a dialog rather than acting immediately. Two are just signposts: Manage Team... and Upgrade to Pro... simply take you to a page.

How the List Filters and Orders

Typing narrows the list. It never re-ranks it.

- The match is a plain case-insensitive substring against the whole row: menu name, submenu name and label together. So "view" lists the entire View menu, "settings" lists the whole Settings submenu, and "theme" lists the three theme rows even though none of them has that word in its label
- There is no fuzzy matching. The letters have to appear together and in order: "dsh" finds nothing, "dash" finds Dashboard
- Matches always keep the palette's own fixed order (File, Go, Edit, View, Insert, Team, Tools, Help). Nothing is promoted by relevance or by what you ran last, so a command sits in the same place every time. That order is the palette's own: the menu bar renders File, Edit, View, Insert, Go, Team, Tools, Help, so Go sits in a different place there. Nothing is promoted by relevance, by how well it matched, or by what you ran last, so a command sits in the same place every time
- Down and Up arrows move the highlight, Enter runs the highlighted row, Esc closes. The mouse works too: hovering a row highlights it, clicking runs it
- When nothing matches, the list reads "No commands match."

Running a row always closes the palette first, so what you see can never be a stale snapshot.

> **Tip** Because the menu name is part of the match, typing a menu name is the fastest way to browse one menu: "go" for navigation, "view" for the display and the theme, "tools" for settings.

Hidden Rows and Pro Rows

Commands you cannot use are handled in three different ways.

Hidden by role. Manager-only commands are absent, not greyed. New Project..., Import..., Projects, Team, Add Member..., Manage Team..., and the Email and AI Assistant rows of the Settings submenu appear only for a manager. For anyone else they cannot be found by searching at all. New Task is hidden the same way from read-only viewers.

Hidden because there is nothing to do. The palette lists only enabled commands, so Undo and Redo drop out of the list entirely when there is nothing to undo or redo, instead of sitting greyed at the bottom.

Marked Pro, but still live. Premium commands are never hidden and never greyed. They stay searchable, carry a small "Pro" chip, and still answer when you press Enter:

- Dashboard, My Tasks and Magic Overview open the free demo of that page
- Export..., Import... and AI Assistant open the upgrade dialog
- Day, Month and Hours open the upgrade dialog and leave the timescale unchanged. Week is the timescale the free plan includes; in Claude's project all four are open

The Pro chip only appears once your license has actually been read, so a Pro user never sees a chip flash on a fresh load. Upgrade to Pro... in the Help group is the mirror image: it appears only once the license has been read as free.

> **Tip** A row you expect but cannot find is usually a role gate, not a search problem: manager-only commands are not in your list at all.

Two Palettes, One Key

Ctrl+K opens one of two different palettes, and which one you get depends on the page you are on.

Everywhere in the app: the global palette described above. It runs application commands (navigate, undo, switch theme, open a settings tab) and its search box reads "Type a command...".

On the Magic Overview: that page's own palette, which acts on the board in front of you rather than on the app. Its search box reads "Jump to a phase or milestone, toggle a layer..." and its rows are grouped under Jump, Spotlight, Toggle, Presets and Stage: jump to a phase or an upcoming milestone, spotlight a milestone's dependencies, toggle Show critical connections, Show all connections, Hide text labels, Merge all rows, Stack leaf tasks, Story rail or Overdue filter, apply a saved preset, or Start presentation. It also has a visible trigger, the key cap button in the pulse strip, which the global palette does not have.

The global palette deliberately stands down on the Overview so the two never fight over the key. That also means Ctrl+K will not reach the Go and Settings commands while you are on the Overview. Use the menu bar in the header, or leave the page first.

> **Tip** On the free plan the Magic Overview shows a demo of the page, and the demo has no palette of its own, so Ctrl+K does nothing at all there.

> **Tip** The Overview palette only arms once the board has loaded, so Ctrl+K does nothing while the page is still empty or no project is open.

The Desktop File Menu Is Not In It

On the desktop editions the title bar carries its own File menu, and those file actions are not in the palette. New project file..., Open project file..., Save As..., Share a copy of this file..., Merge returned copy... and Recent files live only in that menu, because the palette runs the shared command registry and the title bar deliberately leaves the File group out of the shared menus.

What the palette does list under File is the in-app set: New Project... (which lands on Projects with the create-project dialog open), Export... and Import...

> **Tip** If you are hunting for a file action and the palette has nothing, look at the title bar File menu instead.

> **Tip** That File menu has its own rules the palette never shows: on the free plan New project file..., Open project file..., Save As... and other Recent files carry a Pro chip and open the More Project Files dialog, and read-only viewers do not get New project file... or Save As... at all.

Customization & Display

Personalize the app's appearance, behavior, and display preferences.

Themes

Three theme options:

- Light: clean white background for well-lit environments
- Dark: dark background that reduces eye strain in low light
- System: automatically follows your operating system's preference

Use the quick toggle in the header to switch between Light and Dark. For System mode, go to Settings > Appearance.

Accent Colors

8 accent colors to choose from: Indigo (default), Blue, Violet, Rose, Emerald, Amber, Cyan, and Slate. The accent tints buttons, active states, links, selection highlights, and progress indicators throughout the entire app. Change in Settings > Appearance.

Gantt Display Options

Fine-tune the Gantt chart appearance in Settings > Display:

- Task labels: on bar, outside bar, or hidden
- Progress color: By Status, Subtle, By Progress, Custom (two colours: completed and remaining), By Assignee, or By Group (default: By Status); Faded remaining part (on by default) shows the part of a bar not done yet see-through, in every progress color
- Timeline elements: Dependency arrows, Weekend shading, Holiday shading, Today line, Deadline line, Task info on hover, Drag info panel, and Dependency highlights (dots on the selected task's predecessors and successors)
- Dependency arrows: style (Orthogonal, Rounded, Curved, Straight), thickness (Thin, Normal, Bold), Color by type, Arrow animations, tooltips, Highlight chain on hover, Show violation indicators with a style (Dashed + pulse, Dashed only, Color only), and lag-day labels

Date Format

4 date formats available in Settings > Calendar:

- MM/DD/YY: US format
- DD/MM/YY: International format
- YYYY-MM-DD: ISO standard
- DD MMM YY: Short month name (e.g., 05 May 26)

This affects all date displays throughout the app: task panels, tooltips, filter pickers, and export files.

Work Schedule

Configure your team's work calendar in Settings > Calendar:

- Working days (manager only): which days of the week count as work days
- Holidays (manager only): specific non-working dates, and whether they stretch task durations
- Week starts on (your own preference): Sunday, Monday, or Saturday
- Date format (your own preference): Auto (browser language) or one of four fixed formats

Non-work days are shaded on the Gantt timeline and excluded from duration calculations.

Hide app bars

For a small window, such as the Gantt inside a VS Code tab, the app can fold its bars away: the left sidebar, the header with its icons and menus and the desktop title bar are not drawn; on the Gantt page the status line goes too (the mini-map follows its own switch), and the toolbar stays on one line: in a wide window every icon is there, and as the window narrows the zoom sliders give way first, then the display toggles, the markers, 3D and Baselines (the View menu and Ctrl+K still reach them); the timescale (Day / Week / Month / Hours), Today, Filters, the Split / Timeline / List button and New Task always stay. Every page gets the room.

Ways in: the header button whose tooltip reads "Hide app bars" (beside the zoom), View > Hide app bars in the menu bar, the same item in the Ctrl+K palette, Ctrl+Shift+Space, or ?bars=hidden in the address.

Ways back: the thin strip across the top of the window (one click), the same menu or palette item, Ctrl+Shift+Space, or ?bars=shown in the address.

> **Tip** The choice belongs to the tab: reload it and the bars stay as you left them; a new tab starts with the bars shown. It is never saved to your account, so your other windows keep their bars.

> **Tip** The VS Code tab starts with the bars hidden. The strip at the top is its way back.

> **Tip** Hide app bars and the zoom are independent: both together give the most room.

Zoom the app

The app header has a zoom button, beside the notification bell, that works the way the browser's zoom does: it shows the current zoom (100% at first), and its menu zooms in and out along the browser's steps, from 50% to 200%, or returns to Actual size. Ctrl + = zooms in, Ctrl + - zooms out and Ctrl + 0 returns to Actual size, as in VS Code and the browsers (the numeric keypad's + and - work too). View > Page zoom in the menu bar and the Ctrl+K palette offer the same three commands. The zoom scales the whole app shell; floating windows and menus keep their normal size.

> **Tip** Different from the Gantt's own zoom: Day / Week / Month and the toolbar zoom sliders resize the chart itself, while the app zoom scales the whole app around it.

> **Tip** The zoom is remembered on this device, not in your account, like the browser's own zoom. While the app has the focus, Ctrl + = / - / 0 zoom the app; the browser's own page zoom stays in the browser's menu, and the two multiply.

Notification Preferences

Customize notifications in Settings > Notifications:

- In-app toasts: duration, task/dependency toasts, team-activity toasts
- Per-event toggles (feed + email): Assignment changes, Task updated, Task completed, New comment, Due-soon reminders
- Oversight on tasks I own: pings when someone else completes/blocks/edits a task you own, or it goes overdue; turn off to mute oversight as a busy owner
- Email delivery: the 'Email me notifications' switch turns notification emails off while keeping the in-app feed
- @mentions are never muted

These are personal preferences. Each user can set their own. (See also the Notifications feature topic.)

Part II — Roles & Plans

5. Roles & Permissions

Four kinds of people can be on a team (Managers, Members, read-only Viewers, and name-only Contractors), each with a different level of access.

Manager Role

Managers have full project control:

- Create, edit, and delete any task (not just their own)
- Add, edit, and remove team members
- Reset member passwords
- Configure project settings (calendar, scheduling, email, display)
- Create and delete projects
- Access all settings tabs including Calendar and Email
- Manage AI settings (if enabled)

Member Role

Members have focused permissions:

- View all team tasks across every page
- Create their own tasks and edit tasks assigned to them
- Pick same-team assignees while CREATING a task; changing who a task is assigned to afterwards is manager-only
- Move or regroup a subtree only when they own (or are assigned to) the summary and every task under it
- Update their own profile, password, and time off
- Use the Dashboard, Gantt (Split / Timeline / List views), and My Tasks pages
- Export project data
- Configure personal display settings (theme, accent color, Gantt display options)

Both Managers and Members are confined to their own team(s). Neither can see or touch another team's projects.

Viewer Role (read-only)

A Viewer can sign in and see everything the team sees (every page, task, chart, and report) but cannot change anything. Every edit surface is disabled or hidden for them.

- Sees the Gantt, Dashboard, and reports exactly as members do
- Cannot create, edit, move, or delete tasks, and cannot be assigned tasks
- Can still edit their own profile, password and notification preferences, but cannot record time off
- Can ask the AI assistant questions; every change it proposes is refused with 'Viewers have read-only access'
- Viewers are seat-free; they never use one of your license's Team seats
- The exact list of what a viewer may change: their profile, their password, their notification feed and preferences, switching between project files on the desktop editions (never Save As), and asking the AI assistant or the portfolio digest. Every other write is refused

Use a Viewer login for stakeholders, clients, or executives who need visibility without edit risk. Managers assign the Viewer role in the Add/Edit Member dialog on the Team page.

Contractors (name-only people)

A Contractor is a person you plan work for who has NO login: just a display name (and optionally a job title). They behave like anyone else on the plan (you can assign them tasks, see their workload and time off, and include them in leveling), but they can't sign in, and they never consume a license seat.

- Add one from Team > Add Member by choosing "Contractor" instead of "Team member"
- Importing a project file can add its unknown assignees as contractors in one step
- Convert a contractor to a full member at any time; they keep their entire task history and start using a seat

Contractors are ideal for external vendors, freelancers, or teammates who don't need to touch the tool.

Role-Based UI

The app adapts its interface based on your role. Features only visible to Managers include:

- The Team page itself (members and viewers are redirected away from it), with its Add / Edit / Remove member actions
- The team-wide Calendar settings (working days, holidays); date format and week start are personal and open to every role
- Email Server settings
- Default gap days in the Scheduling section of Display (the rest of Scheduling is a Pro feature open to any role)
- The role dropdown on each row of the Team page (the member detail panel has no role control)
- Password reset for other members

Members see a streamlined interface focused on viewing tasks and editing their own assignments. Viewers see the same pages with every edit control removed. Each person's row on the Team page carries a role badge (Manager / Member / Viewer / Contractor) so you always know who can do what.

Permission Matrix

The fast answer to 'can I...?'. Everyone is confined to their own team's projects.

Action	Manager	Member	Viewer	Contractor
Sign in	yes	yes	yes	no
Be assigned work	yes	yes	no	yes
Create tasks	yes	yes	no	-
Edit a task	any	own or assigned	no	-
Choose assignees	any time	when creating (same team)	no	-
Set a task's Group tag	yes	no	no	-
Move a task under another parent	any	tasks they can edit	no	-
Move or regroup a whole subtree	any	only a subtree they own or are assigned throughout	no	-

Delete a task	any	own	no	-
Comment and @mention	yes	yes	no	-
Record time off	anyone's	own	no	a manager records it
Manage the team (add, roles, reset, delete)	yes	no	no	-
Team-wide settings (working days, holidays, Email Server, AI, default gap)	yes	no	no	-
Personal preferences (theme, date format, display)	yes	yes	yes	-
Ask the AI assistant	yes	yes	ask only	-
Uses a license seat	yes	yes	no	no

The system administrator is a separate login that lands on the Admin page.

Who Uses a License Seat?

Your license's Team seats count LOGIN-capable editors only (Settings > License puts it as 'Managers and members use a seat; viewers and contractors are free'):

- Managers and Members: use a seat
- Viewers: seat-free
- Contractors: seat-free

The Team page header shows "N of M seats used" plus separate contractor/viewer counts. At the seat cap you can still add contractors and viewers; converting a contractor to a member is what starts consuming a seat.

6. Plans & Licensing

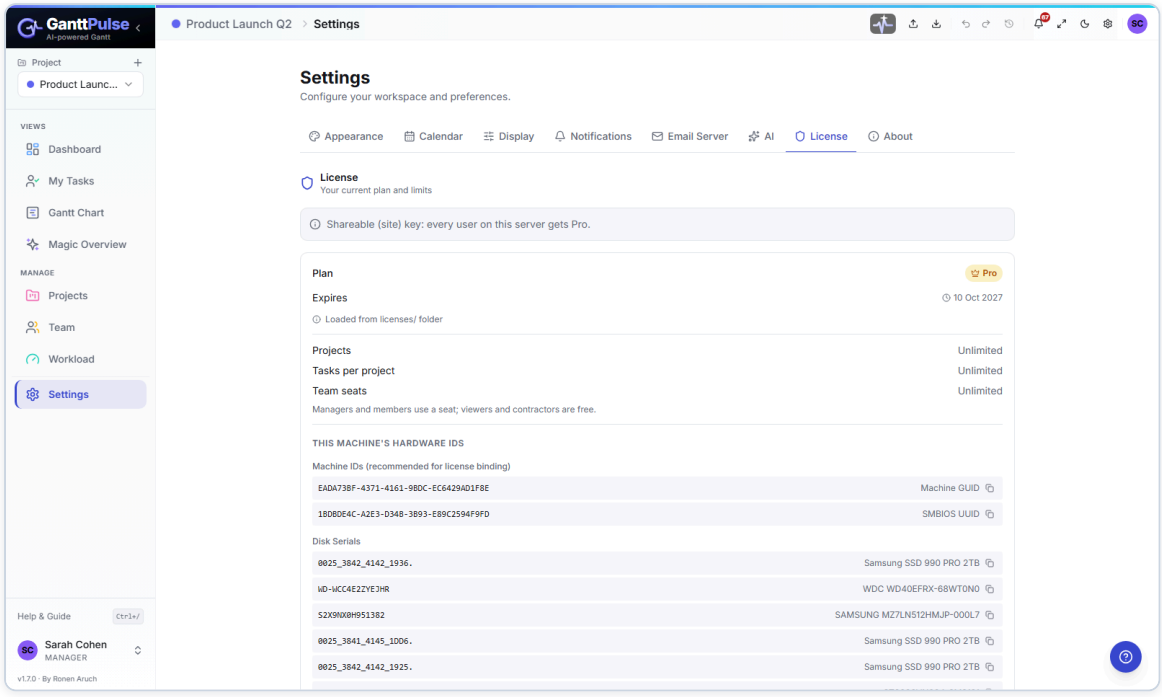


Figure 3 — The License tab — plan, limits, and license key management.

What each plan includes, what counts as a seat, what a wall looks like when you hit one, and where to upgrade.

What the Free Plan Includes

The free plan is the full planner with caps and a few Pro surfaces turned into previews:

- 1 project, 15 tasks per project, 3 seats (viewers and contractors are seat-free)
- One level of subtasks: a subtask cannot have subtasks of its own
- Finish-to-Start links only, with no auto-scheduling: moving a task never moves its successors, and a link's gap stays 0
- Week view only on the Gantt; Day, Month and Hours are Pro (Claude's projects show all four)
- Basic filters: search, Status, Priority, Group, My Tasks and Hide Done
- Comments and the task history are included
- Claude's projects (made through the Claude Code connector) have no caps, and people only watch them: the page is the one a viewer sees (the selection bar keeps its count and Clear, a row's action bar keeps View description, Locate and Open, New Task gives way to the notice, bars do not drag). They follow Claude's own work by themselves: changing one, by hand or by asking Claude, needs a paid plan
- In the desktop login edition, the fixed project files: the default workspace, the demo, and claude.db (Claude's own file)

Dashboard, My Tasks, Magic Overview and Workload open as previews with an upgrade link; Import/Export, the AI assistant, swimlanes by assignee and the 3D show are Pro.

> **Tip** The sample project you can generate on an empty workspace is a real project: it uses most of the free plan's task cap and its single project slot.

What Starter and Pro Add

Plan	Projects	Tasks per project	Seats	Adds
Free	1	15	3	the planner
Starter	5	200	10	Dashboard, My Tasks, email, all filters, Day, Month and Hours views, project files, editing Claude's projects by hand
Pro	unlimited	unlimited	unlimited	everything: AI assistant, Import/Export, Magic Overview, Workload, auto-scheduling, all link types, deeper nesting, swimlanes, 3D, custom colours

Enterprise keys carry the Pro set with custom terms. The License tab in Settings shows your plan, its limits and its expiry.

What Counts as a Seat

A seat is a login-capable account that can edit: managers and members. Viewers (read-only logins) and contractors (name-only people with no login) never use a seat, so a small plan can still carry a large roster. The Team page header shows seats used; at the cap you can still add viewers and contractors, and converting a contractor to a member is what takes a seat.

What a Wall Looks Like

- A cap: the Plan Limit Reached dialog names the limit (projects, tasks or seats). Delete something, add the person as a contractor or viewer, or upgrade.
- A Pro control: it stays visible with a Pro ring or chip, and clicking it opens an upgrade dialog that says which feature it is (Multi-Level Subtasks, All Dependency Types, Auto-Scheduling, More Project Files, ...).
- A Pro page: it opens as a preview of the real page with an upgrade link.
- Silent limits: on the free plan a new link's gap is stored as 0, custom bar colours are dropped, and dragging a predecessor leaves its successors where they are.
- Claude's project: the page looks as it does to a viewer, and the lock is named once, by the toolbar notice Claude's project · view-only on the free plan, which opens the Edit Claude's Projects upgrade dialog. What that means on the Gantt: the selection bar shows the count and Clear only (no delete, indent, status, priority, assign, move or copy), a row's action bar shows View description, Locate and Open only (no move, add, duplicate, indent or delete), the toolbar has the notice where New Task would be, and bars do not drag; in the portfolio the project's Actions menu offers Edit Claude's project… in place of Rename, Archive and Delete. Comments stay open. Asking Claude for the change is a paid plan's too: on the free plan the chart follows Claude's own work, and a change to a task's dates, length or description asked of the chat is refused. With a Pro key every one of these comes back, as on a project of your own.

Upgrading and Activating a Key

Settings > License (also Help > Upgrade to Pro... in the menu bar) shows the plan and takes a license key: paste the key that starts with GP- or browse to the key file, then click Activate License. Limits and Pro controls update at once, no restart. A key can be bound to one machine or shareable; the Hardware IDs section shows what a machine-bound key needs.

A paid key is one year of updates. Every version made within that year keeps your plan for good; a version made later needs a renewed key.

> **Tip** What the License tab shows afterwards (where the key came from, the expiry warning 30 days out, the 72-hour grace after a hardware change on a server edition, a revoked or damaged key) is described in the Settings guide under License & Activation; the messages themselves are in the Problems tab.

Part III — Projects & Tasks

7. Projects & the Portfolio

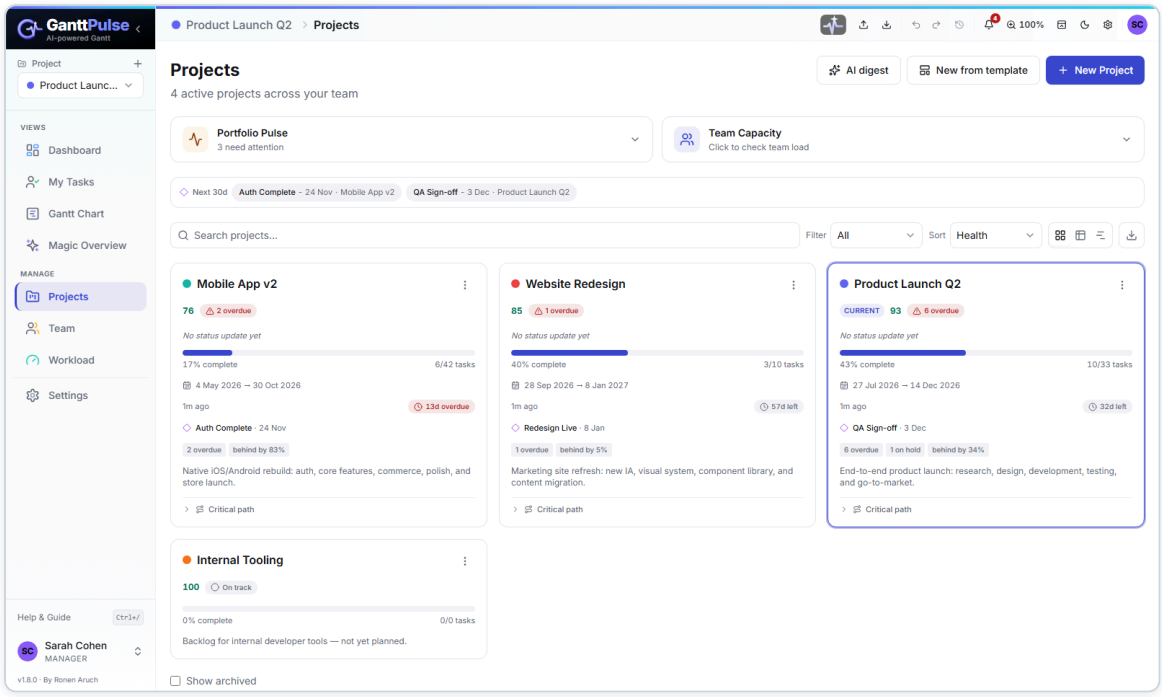


Figure 4 — The Projects page — every project as a card, with health, favorites, and status updates.

A manager's cross-project home: every project you run at a glance, with portfolio-level health, search and sort, and quick access to create, open, duplicate, edit, post status updates, save as a template, archive, and delete them.

Your Projects

> **Note** Managers only.

Each card summarizes a project: its name, dates, and high-level progress and health. Click a card to open that project (it becomes the active project across the Gantt, My Tasks, and Dashboard).

What a Card Shows

> **Note** Managers only.

The name has the card's first line to itself, and a long name takes a second line; the score, the health badge and the Current badge sit on the line under it. Besides the name, dates and progress, each card carries:

- A health score out of 100 and a badge: At risk whenever the project has an overdue task, Complete when every task is done, On track otherwise. The score reads as a dash until the project has dated tasks
- A Why? button on the badge that opens the computed health drivers, plus a 'No activity for Nd' line once nothing has changed for 7 days
- A time-left chip against the project's end date: days left, due today, or days overdue
- A Critical path row you can expand to see the driving chain and the next critical task with its due date
- A Current badge on the project that is open right now

Favourites & Recent

> **Note** Managers only.

Hover a card and click its star to favourite the project (a starred project keeps its filled star visible). Favourites float to the top of the list in every view, ahead of the sort you chose, and to the top of the sidebar's project switcher. A 'Recent:' chip row under the page header lists the projects you opened last (up to 5, shown once there are at least two); click a chip to open that project.

Upcoming Milestones Strip

> **Note** Managers only.

A strip of chips lists the milestones due across your active projects in the next 30 days, soonest first. It shows the chips that fit on its one line, up to 12; a '+N more' button at its end lists the rest, and a line of that list opens its project as a chip does. Each chip names the milestone and its date, and clicking it opens the project. Archived projects and past-due milestones are left out.

Find & Organize

> **Note** Managers only.

Use the toolbar to cut through a long list: search by name, filter by health (All, At risk, On track, Complete), and sort by Health, Name, Progress, or End date. The list updates instantly. The toolbar stays on one line in a narrow window: Filter and Sort become icon buttons that open the same choices (a dot on the Filter icon means a filter is on), and in a phone-size window they move, with Export, under one More button.

Card, Table & Timeline Views

> **Note** Managers only.

Toggle between the Card view (visual summaries, good for browsing), the Table view (a dense, scannable list, good for comparing many projects side by side), and the Timeline view (every active project as a health-colored bar on one shared timeline, with milestone markers and a today line; click a bar to open that project). Search, filters, and sort apply to all three views. In a narrow window the three view buttons are one button that lists them. A table wider than its box scrolls sideways with the project's name in place (and the row's ⋯ menu, except in a phone-size window), and the Timeline's names column narrows so the timeline keeps its room.

Portfolio Pulse & Team Capacity

> **Note** Managers only.

Two summary cards sit above the list. Portfolio Pulse counts how many projects need attention or are finishing soon. Team Capacity reads 'Click to check team load' until you expand it; it then fetches the load across all your projects, counts how many people are over-allocated, and lists each person's load as a bar in its detail. The capacity detail is gated with the Dashboard feature (Pro). Click a card to expand its detail.

Reported Status & Update Nudges

> **Note** Managers only.

Managers can post a status update from a project's ⋯ menu: pick On track / At risk / Off track and add a short note. The latest update appears as a 'Reported:' chip beside the computed health badge; it never replaces the computed health: the badge stays the math, the reported status is the narrative next to it. When the latest report goes stale you'll see a muted 'Update overdue' nudge (or 'No status update yet' if none was ever posted). The latest entry is visible to everyone; the full update history is a Pro feature.

Portfolio Export (Pro)

> **Note** Managers only.

The toolbar's download button (in a phone-size window, the Export portfolio line of the toolbar's More button) exports an executive report across ALL your projects: an Excel workbook or a PDF one-pager with health, progress, slip, next milestones, and each project's latest reported status. You can optionally include archived projects. Portfolio export is a Pro feature.

Create, Edit & Rename

> **Note** Managers only.

Create a new project from this page, and edit an existing project's details (name, description, dates) without leaving it. You can also rename a project inline from its card. A new project starts today and ends 90 days later by default; change either date before you save.

Duplicate a Project

> **Note** Managers only.

Duplicate a project to deep-clone its whole plan (every task, dependency, and assignment), rebased to a new start date you pick. The copy keeps the assignments but resets progress, so it starts as a fresh plan. Use it to spin up a repeatable project from a proven template.

Project Templates

> **Note** Managers only.

Save any project's plan as a reusable template from its ⋯ menu ('Save as template'). The tasks, hierarchy, dependencies, durations, and milestones are captured (dates become offsets from the start, so a new project rebases cleanly). Click 'New from template' beside 'New Project' to open the template gallery and spin up a fresh project from a saved plan. Templates live apart from your portfolio; they don't count as active projects. Progress and assignments are dropped when a template is saved, so every project made from it starts fresh; in the gallery, the trash icon beside a template deletes it.

AI Portfolio Digest & Status Drafts (Pro)

> **Note** Managers only.

Ask AI for a one-click executive digest across your portfolio: a short summary plus a 'needs attention' list, grounded only in your real project data (health, progress, slip, milestones, latest reported status). Inside the status-update dialog, 'Draft with AI' proposes a status (a suggested On track / At risk / Off track plus a note) for you to review and edit before posting; it never posts on its own. The AI digest and drafts are a Pro feature.

Archiving Projects

> **Note** Managers only.

Archive a finished project to take it out of the active lists without deleting its data. While archived the project is read-only (any edit is refused with 'Project is archived. Restore it to make changes'), its tasks leave My Tasks, it drops out of Portfolio Pulse, Team Capacity and the milestone strip, and the people who own or are assigned its tasks get a notification. Toggle 'Show archived' to reveal archived projects, and restore one to bring it all back. Archiving is reversible. Nothing is lost.

Deleting a Project

> **Note** Managers only.

Delete permanently removes a project and all its tasks; to confirm, you type the project's name into the dialog. This cannot be undone. To set a project aside without losing it, archive it instead.

What's on this screen

Control	What it does
New Project (managers)	Create a project: a name, an optional description, and start and end dates. New from template beside it starts from a saved layout.
Export portfolio (Pro)	Download an executive report across ALL your projects: an Excel workbook or a PDF one-pager with health, slip, milestones, and reported status.
Show archived (managers)	Reveal archived projects so you can review or unarchive them. Archiving is reversible. Nothing is deleted.

8. Working with Tasks

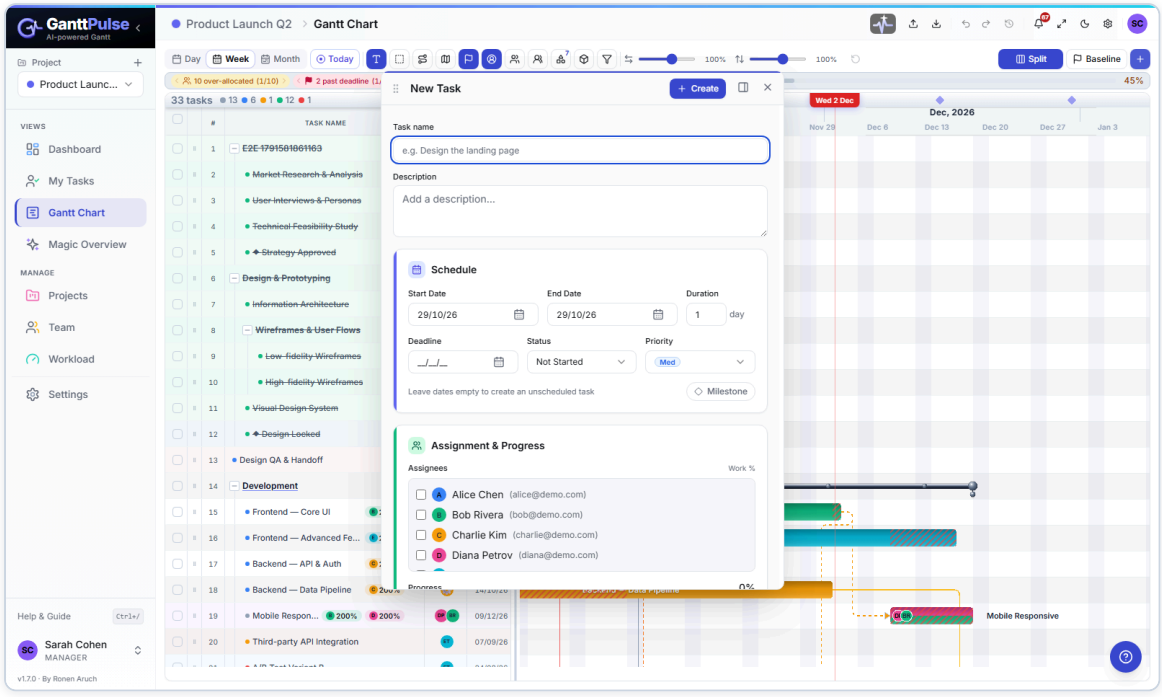


Figure 5 — The New Task window — the same window is used to edit an existing task.

Task Management

Create, edit, organize, and track tasks across your project.

Creating Tasks

Multiple ways to create tasks:

- Click "+ New Task" in the toolbar
- Press N on the Gantt page
- Press Shift+Enter to insert below the selected task
- Press Insert to insert above the selected task
- Use Quick Add on the My Tasks page

Only the task name is required. All other fields (status, priority, assignees, description, hours) are optional. A new task's dates default to today (or the next working day); clear both dates to create an unscheduled task, which appears in the task list but not on the Gantt timeline.

On the free plan a project holds up to 15 tasks; past that, creating one shows the Plan Limit Reached dialog.

Editing Tasks

Three ways to edit:

- Open the task window: double-click the task's name in the Gantt list or double-click its bar on the timeline (on a phone, tap the ... at the end of the row; the row's Actions menu also has Edit task)
- Click a cell in the Gantt task list for inline editing
- Drag a task bar on the Gantt timeline to change dates or duration

The task window provides access to every field: name, description, dates, duration, deadline, status, priority, progress, assignees and their work-%, group (managers), parent task, milestone, dependencies, notes, and estimated/actual hours.

Parent-Child Hierarchy

Indent tasks to create subtasks under a parent. The parent task acts as a summary:

- Its date range automatically spans all children
- Its progress auto-calculates as a DURATION-WEIGHTED average of its children, so a long task counts for more than a short one (a plain average is used only when the children have no durations). A cancelled subtask is left out, so it never holds a summary under 100%
- Its status is derived too: Not Started, In Progress or Completed, never On Hold or Cancelled. It reads In Progress as soon as any child has started, even one still at 0%
- Expand/collapse to focus on specific areas

Use Tab to indent (make child of the row above) and Shift+Tab to outdent (promote) in the Gantt task list, or Demote / Promote in the row's Actions menu, or Indent / Outdent in the bulk bar for a selection. A milestone cannot hold subtasks, and a task with subtasks cannot become a milestone.

On the free plan nesting stops at one level of subtasks: a second level opens the "Multi-Level Subtasks" upgrade dialog.

> **Tip** A parent's end date, duration, progress and status are read-only - they always reflect its children. The one exception is the START DATE, which IS editable and is labelled "Start Date (moves group)": changing it shifts the whole subtree.

Task Statuses

5 statuses track where each task is in its lifecycle:

- Not Started (gray): default for new tasks, no work begun
- In Progress (blue): active work is happening
- On Hold (amber): temporarily paused, not abandoned
- Completed (green): work is finished and verified
- Cancelled (red): task abandoned, will not be done

> **Tip** Status and progress auto-sync: 100% marks the task Completed and Completed sets 100%; 1-99% moves a Not Started or Completed task to In Progress; 0% moves an In Progress or Completed task back to Not Started. On Hold and Cancelled are left alone by a progress edit (a bulk status edit applies to every selected task alike).

Task Priorities

4 priority levels help you triage work:

- Critical (red): must be done immediately, blocks other work
- High (orange): important, should be addressed soon
- Medium (blue): normal priority, standard workflow
- Low (gray): nice to have, do when time allows

Progress Tracking

Set task progress from 0% to 100% with the slider in the task window (steps of 5%), the % cell in the task list, or the progress handle on the bar. Progress is visualized on Gantt bars as a filled portion. Track estimated vs. actual hours to monitor effort and improve future estimates.

When work on a task really starts and finishes, the times are kept: under the hours, the task window shows a line like "Started Oct 30 22:10 · Finished 23:40 · 1 h 30 min" (or "in progress, 1 h 30 min so far"). Claude Code's tasks fill Actual Hours with the time Claude really spent working. The Actual hours column in the task list (hidden by default) shows it, a summary the total of everything below it, and the Hours view draws each task at its real times.

> **Tip** Setting progress above 0% on a Not Started task automatically changes its status to In Progress.

Milestones

Mark a task as a milestone to flag it as a key project checkpoint. Milestones appear as diamond shapes on the Gantt chart instead of bars. Use the "Milestones" filter toggle (Pro) to see only milestones across the project. A milestone is one day long and cannot hold subtasks.

Task Window: Limits and Read-Only Cases

- A task name holds up to 255 characters, a description up to 2,000 and notes up to 5,000; the name field stops you at the limit, the other two are refused on save.
- Typing a date that is not a working day is refused with Not a working day; pick a working day or change the calendar in Settings > Calendar.
- An empty hours field means no value; clearing hours on a task that had them stores 0.
- The window turns read-only with a banner when you cannot edit the task: View only. Viewers can't make changes, or View only. You can only edit tasks assigned to you. For a member the Assignees field reads Assignment is manager-only after creation, and the Group field says (manager sets).
- Deleting from the window deletes the subtasks too; the confirmation counts them, and **Ctrl**+**Z** brings everything back.

Undo & Redo

All task changes can be undone:

- Ctrl+Z to undo the last action
- Ctrl+Y or Ctrl+Shift+Z to redo

The undo/redo buttons in the header toolbar show the available action. Works for task edits, status changes, reordering, deletions, and more.

Copy, Cut & Paste

Use the context menu (right-click) or keyboard shortcuts:

- Ctrl+C: copy the selected task and its subtree
- Ctrl+X: cut the selected task (moves it)
- Ctrl+V: paste the copied/cut task below the selected row
- Ctrl+D: duplicate the selected task with its subtasks, right after it (also Duplicate in the row's Actions menu)

Copied tasks include their full subtask hierarchy, preserving the tree structure.

Task Assignments & Work-%

Assign one or more people to a task from the detail panel: members, contractors, anyone on the team. Each assignment carries a work-% (default 100%): how much of that person's capacity the task takes, which is what the over-allocation and workload views add up. Assignees see the task on their My Tasks page, bar colors on the Gantt reflect assignees' avatar colors, and notifications go out when assignments change.

Who can assign: managers can (re)assign anyone at any time; members can pick same-team assignees while CREATING a task, but changing the assignment afterwards is manager-only.

Comments & @Mentions

Every task has a comment thread at the bottom of its edit window. Managers and members can comment, even on tasks they can't edit; viewers cannot. Type @ to mention a teammate; they get a notification (and an email if enabled) that deep-links back to the task. Tasks with discussion show a speech-bubble badge with the comment count in front of their Gantt bar.

Ctrl+**Enter** posts the comment you are typing. The thread shows the latest 100 comments.

Bulk Actions

Check several rows in the Gantt task list and act on all of them at once: delete, move in the tree, change status or priority, set the connection gap, assign, move or copy after another task.

Selecting Rows

Tick the checkbox at the left edge of a row; **Ctrl**+**A** selects every row. While anything is checked, the bulk bar appears in the task-list header with the count and the actions below. **Esc** (or Clear selection) empties the selection. A viewer only gets the count and Clear selection; the actions are for people who can edit.

What the Bar Can Do

- **Delete selected**: asks once, lists what goes (subtasks and dependency links included), then deletes all of it as one undo step.
- **Outdent selected / Indent selected**: moves every checked row one level left or right. Indent needs a row above to nest under; outdent needs a row that is not already top level.
- **Edit status / priority**: pick a Status or a Priority for all of them; Mark complete sets every leaf to Completed and 100%, while a summary in the selection stays derived from its children.
- **Gap chip** (Pro): sets one working-day gap on every incoming connection of the selected tasks; hidden when none of them has a connection.
- **Assign selected to…** (managers): adds a person to every checked task.
- **Move after a task / Copy after a task**: pick a destination row; the selection lands right after it, copies with their subtasks. A copy that is refused part-way is removed again, so nothing half-copied stays.

Every action is one undo step: **Ctrl**+**Z** puts the whole batch back.

What a Member's Selection Does

Members can act only on tasks they own or are assigned to. A bulk edit skips the rows they cannot edit (the toast says Nothing to update when none is left); a bulk delete skips tasks they do not own (Nothing to delete); a move is refused as a whole if the selection contains a task they cannot edit (Can't move selection). Managers are never filtered.

9. The Gantt Chart

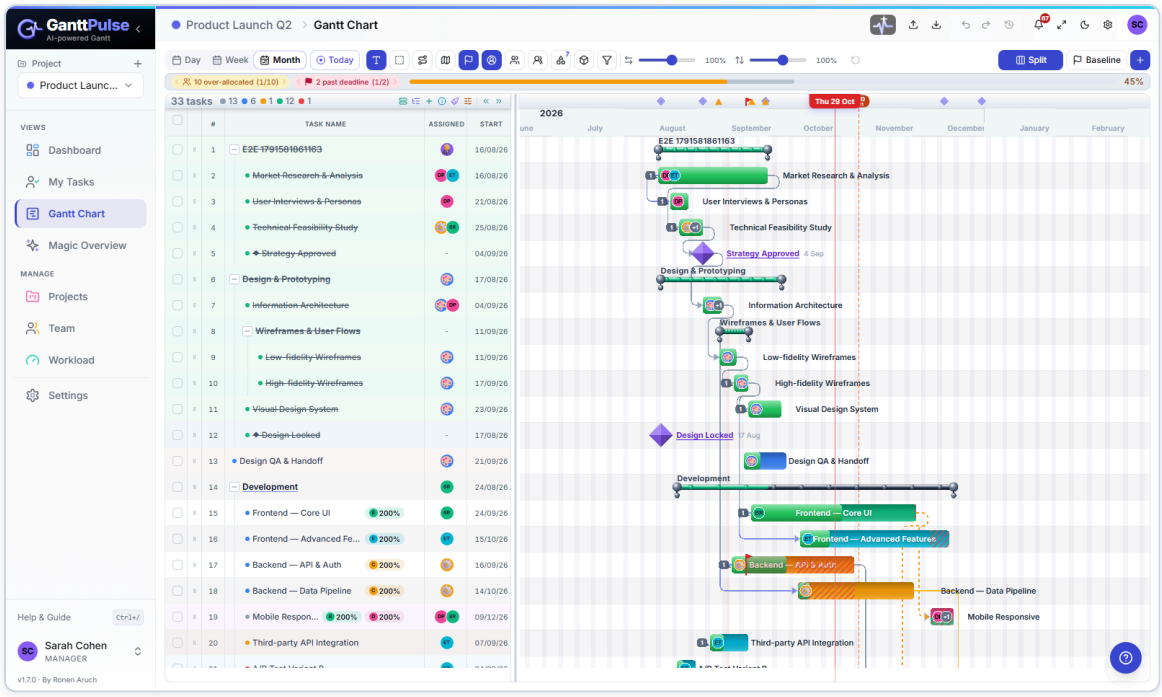


Figure 7 — The Gantt chart (Month view) — task list on the left, timeline with bars, dependencies, and milestones on the right.

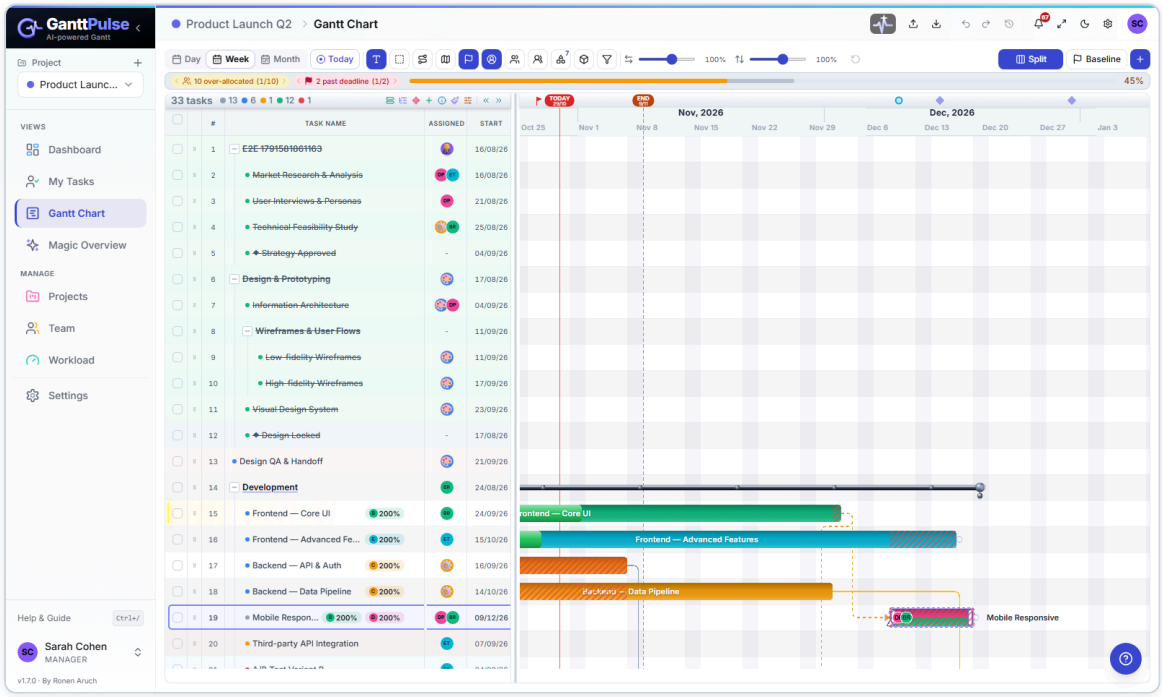


Figure 6 — Dragging a bar — the live HUD pill shows the new dates and duration while you drag.

Visual timeline for planning and tracking tasks. Drag bars to reschedule, draw arrows for dependencies, and manage your project from a single view.

You are signed in as a viewer

> **Note** For viewers (read-only accounts).

A viewer sees the whole plan but changes nothing: there is no New Task button or N key, no Undo, bars do not drag, cells do not edit, and the bulk bar only counts a selection. Everything that reads still works: switch Day / Week / Month, filter and search, hover a bar for its details, follow dependency arrows, turn on Critical Path Mode, open the mini-map, open a task to read its fields and comments, and take the page tour.

You can still change your own profile, password and notification preferences, and you can ask the AI assistant questions (any change it proposes is refused). If you need something edited, ask a manager or the task's owner.

Split-View Layout

The page is divided into two synchronized panels:

- Left panel: task list with sortable columns (name, status, priority, dates, progress, assignees)
- Right panel: timeline with draggable task bars on a calendar grid

Drag the vertical divider between them to resize. Both panels scroll together vertically so rows always stay aligned.

> **Tip** Double-click the divider to expand the list until every visible column fits (bounded by the window); the two buttons at the right end of the list header collapse it to the Task Name column or expand it again. The list keeps the width you leave it at (480 px the first time) on this device, not a share of the screen; it goes as far right as the window allows and all the way left, the list narrowing under the hand down to nothing, and it stays where you leave it; the Collapse button, Ctrl+\ or View > Show > Task list fold the list away, and the grip at the left edge brings it back.

View Modes & Zoom

Four timeline granularity modes:

- Day view: individual days as columns, best for short-term planning
- Week view: week columns, ideal for sprints and medium-range work
- Month view: month columns, best for high-level roadmaps
- Hours view: hour columns showing when work REALLY happened - each task with recorded work hours from the time it was started to the time it was finished (a task in progress grows up to the now line, which moves every minute; its hours are recorded when it ends). Made for watching Claude Code, whose tasks take minutes. A task with no recorded hours is drawn over its days, every hour of them (a 3-day task is 72 hours wide); one that has not started yet shows faintly. The view reaches 30 days back and 30 days ahead, so a task further off has no bar here. The Hours view only shows: bars cannot be dragged and no new link can be drawn there. The links show as plain arrows between the real bars (without the red marking for a link the plan's dates break, since the Hours view does not draw the planned dates); baseline ghosts, overload bands and deadline flags are left out. Hovering a bar shows its start and finish times, how long it took on the clock and the hours really worked. Switching to the Hours view, or pressing Today in it, puts the now line in the middle, with the work just done to its left.

Switch using the toolbar buttons or press 1, 2, 3 or 4 on your keyboard. Use the zoom slider within each mode for finer control over column width.

Week view is always available; Day, Month and Hours views are part of the Pro plan (free plans see a Pro ring on those buttons). In Claude's project all four views are open on every plan, the free plan included.

Task Bars & Interactions

Each task appears as a colored horizontal bar on the timeline:

- Drag a bar left/right to change its start and end dates
- Drag either edge to change the start or the end (a one-day bar offers only its end edge)
- Progress fills the bar from the left as a darker shade; drag the progress handle to change the % complete
- Parent (summary) tasks render as a slim 3D spine spanning their children, with a ball at each end and a green fill showing rolled-up progress; a summary reads Completed only when every task under it is done or cancelled, so a task set back to In progress reopens it
- Milestones appear as diamond shapes at a single date point
- Tasks with discussion show a small speech-bubble badge with the comment count before the bar

> **Tip** Dragging a parent task moves all of its children by the same offset.

> **Tip** By default the bar's unfilled (remaining) portion wears the task's status color (grey not started, blue in progress, amber on hold, green completed, light grey cancelled), while the completed portion fills green. That is the By Status scheme, the default; pick another (Subtle / By Progress / Custom / By Assignee, where the remaining portion wears each assignee's avatar color / By Group) in Settings > Display > Progress Color.

Task List Panel

The left panel shows tasks in a hierarchical tree structure. Expand or collapse parent tasks with the arrow icon. Tasks are indented to show nesting. Drag rows to move them: drop between two rows to reorder, onto the middle of a summary row to nest under it, and below the last row of a group slide the pointer left or right to choose the nesting level.

Configurable Columns

The task list shows configurable columns: #, Task Name, Status, Assigned, Pri, Group, Start, End, Days, Deps, Gap, %, Deadline, Owner, Days Left, Updated, Notes, Variance and Actual hours - not all are shown by default. Use the Show/hide columns button in the task-list header to show or hide columns (Reset columns is in the same menu), or right-click the column header to open that menu where you are, with Hide 'that column' first. The Days column displays working-day duration; a task that sits only on non-working days (like a Claude Code task done on a Saturday) counts the days it covers, so it is never 0d, and it weighs that much in its summary's progress. Click it to change the duration, which recalculates the end date automatically.

The Gap column (hidden by default; enable it from Show/hide columns; editing a gap needs Pro) shows the working-day gap of each task's incoming connections: click to edit it inline, or open the per-connection popover when a task has several predecessors. Tasks with no predecessor show a dash.

> **Tip** Column visibility preferences are saved per user.

Inline Editing

Click a cell in the task list to edit it in place: name, status, priority, dates, assignees, and more. Press Enter to confirm or Escape to cancel. Double-click the task name (or double-click its bar on the timeline) to open the full task window instead. You can also select a task and press Enter to start editing its name.

Keyboard Navigation

Navigate without the mouse:

- Arrow Down / J: move to next task
- Arrow Up / K: move to previous task
- Enter: edit the task name inline
- Shift+Enter: insert a new task below the selected one
- Insert: insert a new task above the selected one
- Tab: indent (make child of the task above)
- Shift+Tab: outdent (promote to parent level)
- Alt+Up / Alt+Down: move the task among its siblings
- Ctrl+D: duplicate the task with its subtasks, right after it
- Escape: deselect the current task (or connection)
- N: open a blank task window (nothing is created until you save it; not offered to viewers)
- Del: delete the selection after a confirmation (members: only the tasks you own). With a connection selected, Del removes the connection instead

Context Menu

Right-click any task row for quick actions:

- Cut, Copy, Paste (Ctrl+C / X / V)
- Insert task above
- Add subtask
- Convert to milestone / Convert to task
- Copy link to task
- Add dependency (then click the other task), Remove dependencies, Show dependency chain

The row's Actions menu (the ... button at the right end of the row, shown on hover) holds the rest: Edit task, Edit description, Move up / Move down, Add task below, Add milestone below, Duplicate (with subtasks), Promote / Demote (outdent / indent), Locate in timeline, and Delete task.

Copied tasks include their full subtask hierarchy. Deleting a task deletes its subtasks too; the confirmation lists what goes, and Ctrl+Z brings it back.

Dependency Arrows

Dependencies appear as arrows connecting task bars. Hover over an arrow to see the connection type and lag. Click an arrow to select it: Delete or Backspace removes it, Escape deselects; right-click the circle at a bar's end to delete that connection. Arrow style, thickness, color coding, and animations are customizable in Settings > Display.

On Pro, when you drag a task that has successors, dependent tasks automatically cascade, moving in both directions to maintain the gap (MS Project behavior), and ghost bars preview where tasks will land before you drop. On the free plan dragging a predecessor moves only that task: the link is kept and shows as a conflict, and gaps cannot be edited.

> **Tip** To create a dependency visually, use the connection handles that appear at the edges of task bars.

> **Tip** Gap tracking is two switches in Settings > Display > Scheduling: moving a predecessor EARLIER pulls its successors with it (on by default), moving it LATER does not push them unless you turn that switch on (off by default).

Critical Path Mode

Click the route-icon button in the toolbar to emphasize the critical path in place: tasks and arrows on the zero-slack chain turn amber, everything else dims, and non-critical bars grow a thin slack tail showing how many days they can slip before they become critical. A header badge counts the critical tasks. Click it repeatedly to jump through them on the timeline.

The chain is computed in working days, honoring each connection's own gap and dependency type, and recalculates live as you drag bars or edit gaps.

> **Tip** Critical Path Mode highlights in place rather than filtering. You keep the full schedule context while seeing what drives the end date.

Multi-Select & Bulk Actions

Check several tasks (the checkboxes at the left edge of the rows) and an action bar appears in the task-list header row. From it you can: delete, indent/outdent, change status or priority, mark complete, set the connection gap on every incoming connection of the selected tasks (the teal arrows chip, hidden when the selection has no connections), assign people (manager), and move or copy the selection after a chosen task.

> **Tip** Press Escape to clear the selection.

Filter Row

Expand the filter row below the toolbar to narrow visible tasks. Free on every plan: text search, Status, Priority, Group, My Tasks and Hide Done. The rest are Pro: on the free plan Assignee, Date range and Progress are replaced by a "More filters" button that opens the upgrade dialog, and the Pro toggles and presets are not shown. Available filters:

- Text search (task name only)
- Status, Priority, Group and Assignee multi-select dropdowns
- Date range presets or custom range
- Progress range (All / 0% / 1-50% / 51-99% / 100%)
- Quick toggles: My Tasks, Hide Done, Overdue, Milestones, Unassigned, Unscheduled, Blocked, Over-allocated, Conflicted

Choose between Hide mode (non-matching tasks disappear) or Highlight mode (non-matching tasks are dimmed).

> **Tip** Save frequently used filter combinations as named presets for one-click access (Pro). Applying a preset replaces every filter, including the search text.

Hover Info & Locator

Hover a task bar to preview the same overlays you see while moving it: start/end date pills with guide lines, a duration bracket, an on-bar % chip, and its dependency arrows lit up, all without dragging. Hovering a summary row outlines its whole subtree on the timeline, and hovering any bar highlights its matching row in the left list (and vice-versa), so you never lose the pairing on long lists.

> **Tip** Right-click a bar > Info on hover to turn the whole panel on/off or toggle individual parts (dates, progress, connections, summary frame). There's also a master 'Task info on hover' switch in Settings > Display.

Today Line & Visual Guides

A red vertical line marks today's date on the timeline; the chart opens centred on it (or on the task Claude is working on, when there is one), and switching Day / Week / Month keeps the date you were looking at. A dashed orange line marks the project's End date, set in the project's details (distinct from the per-task deadline flags). Weekend columns are shaded to distinguish working days, and holiday dates (configured in Settings > Calendar) are also shaded, even when holidays are set to count as working days. All of these can be toggled in Settings > Display.

Swimlanes (Group by Assignee)

Click the people icon in the toolbar to regroup the SAME chart by person: one lane per assignee (in their avatar color) with that person's tasks stacked inside in task-number order (the resource view). An Unassigned lane collects tasks with nobody on them.

The placement rule is one sentence: a task sits in its FIRST assignee's lane; reorder a task's assignees to move it. The assignee chips still show everyone on it; a member who is never listed first has no lane.

Lanes are display-only: the real task structure is untouched, and while grouped, structure edits (reorder, indent/outdent, insert, paste) are locked. Switch back to tree grouping for those. Everything else works as usual: drag bars to reschedule, edit any field, lanes collapse like summaries.

> **Tip** Swimlanes + the over-allocation hatching answer 'who is overloaded next week and what can I move' in one view.

Deadlines

A deadline is the date a task MUST finish by: a promise, distinct from the SCHEDULED end date the plan computes. Set it in the task editor's Deadline field (or the opt-in Deadline column); clear it the same way.

On the chart, a red flag pins to the deadline day on the task's row: hollow while the schedule meets it, SOLID with a red wash over the bar's overrun the moment the scheduled end slips past it (the tooltip counts the working days over). The flag stays put while you drag; the bar slides under it.

Deadlines never move the schedule: the cascade, connections, and critical path read only the scheduled dates. The flag just makes a broken promise impossible to miss. Toggle all deadline ink with the flag icon in the toolbar.

Deadlines also surface beyond the chart: small flag markers in the header strip sit at each deadline day (red when the schedule overruns it; toggle in the marker group), My Tasks cards show the deadline next to the dates (highlighted red when breached), and the moment an edit pushes a task's scheduled end past its deadline, the owner and assignees get a one-time in-app notification.

> **Tip** Missed a deadline? Turn on Critical Path Mode. The chain driving that task late is where the fix lives.

> **Tip** Ask the assistant "explain task #12". An overrun deadline is part of its answer.

Header Markers

Small clickable markers in the strip above the calendar give a bird's-eye map of the timeline. Click any of them to jump to that task:

- Indigo diamonds: milestones
- Red dots: dependency conflicts
- Emerald lines: filter/search matches (while a filter is active)
- Amber triangles: overdue tasks (past their end, not done)
- Amber chevrons: the critical chain (while Critical Path Mode is on)
- Flags at each task's DEADLINE day: red when the schedule overruns it, slate otherwise
- Sky ring: the selected task; when its bar is scrolled out of view, an arrow pinned to the strip's edge points toward it and clicking re-centers it
- Phase bands (opt-in): thin colored spans along the strip bottom, one per top-level phase

Each marker type has its own toggle in the toolbar's marker group.

Timeline Mini-Map

Toggle the map icon in the toolbar to show a condensed strip of the WHOLE project above the chart: every row as a thin bar, milestones as dots, and a red today line. Two overlaid indicators show where you are: a sky column for the horizontal scroll position and a fuchsia band for the vertical one; their intersection is your viewport.

Click anywhere to jump there (both axes), drag to glide across the project, or use the arrow keys to nudge. The up/down arrows on the map's right edge make it taller or shorter.

The map mirrors the chart's emphasis: the selected task shows sky, the critical chain amber while Critical Path Mode is on, filter matches emerald (non-matches dim), summaries black, and milestones violet.

> **Tip** The mini-map shines on long projects. Keep it on while reorganizing far-apart phases.

Toolbar

The toolbar above the chart provides, left to right:

- View mode selector (Day / Week / Month / Hours; Day, Month and Hours are Pro, and all four are open in Claude's project); a right-click on the timeline's date header offers the same choice where you are
- Today button: brings the task Claude is working on onto the screen; another press goes to the next working task, newest first; with nothing at work it goes to the last finished task, and otherwise centres today's date
- Task-name labels and Summary-frame toggles
- Critical Path Mode toggle (route icon; see below)
- Mini-map toggle (map icon; see below)
- Deadline-flags toggle (flag icon; see Deadlines)
- On-bar assignee chips toggle (circle-user icon; stacks assignee avatar discs at the start of each task bar)
- Hours and tokens toggle (timer icon; shows what a task cost after its name, off by default)

- Group-by-assignee swimlanes (people icon, Pro) and Swimlanes-by-group (two-people icon, free; see below)
- Markers dropdown - the legend and the header-marker toggles (milestones / conflicts / filter matches / overdue / critical / deadlines / locator / phase bands) share one icon; a right-click on the timeline's top strip, above the dates, opens the same menu where you are
- 3D view (cube icon, Pro)
- Filter button to show/hide the filter row (a count marks active filters)
- Horizontal & vertical Zoom sliders with a reset button (wide screens only)
- The status badges (see Header Badges below)
- Split / Timeline / List pane-view cycle (see below)
- Baseline menu (see below)
- New Task button (not shown to viewers)

Import, Export, and Undo / Redo live in the app header (top bar), available from every page.

With the app bars hidden (View > Hide app bars, for a small window or the VS Code tab) the status line folds away, the mini-map keeps following its own switch, and the toolbar stays on one line: every icon in a wide window, then, as the window narrows, without the zoom sliders, and without the display toggles, markers, 3D and Baselines (the View menu and Ctrl+K still reach them); the timescale, Today, Filters, the pane-view button and New Task always stay.

Split / Timeline / List Views

The pane button (next to Baseline) cycles the desktop layout: Split shows the task list and timeline side by side; Timeline hides the list for a full-width chart; List hides the timeline for a spreadsheet-style table (the former standalone Task List). Click the button to cycle Split → Timeline → List. The Gantt always opens on Split. In a small window (an app narrower than 768 px, such as the VS Code tab beside a chat) the button is not shown and the Gantt stays on Split, and at phone size the list takes two thirds of the chart (up to 250 px) so the names show; Ctrl+\ still folds the list away and brings it back.

Header Badges & Navigators

When relevant, small badges appear on the status line, the last line above the chart (on a narrow window, on a line of their own right above it). Most are click-to-cycle navigators that jump the timeline through the affected tasks:

- Red 'N conflicts': dependency violations (a task scheduled to break a link).
- Amber 'N over-allocated': a person summed over 100% on overlapping days.
- Indigo 'N matched': tasks matching the active filter/search (only while a filter is on).
- Amber 'N critical': tasks on the critical chain (only while Critical Path Mode is on).
- Rose 'N past deadline': tasks whose scheduled end has overrun their deadline.
- Slate 'N changed': tasks whose bar moved vs the active baseline (only shows while the baseline ghost is on).

Two more badges answer questions instead of navigating:

- Deadline forecast (Pro, with the AI assistant turned on, and only when the project has an End date): the answer to "are we going to make it?" It shows on track, or projected to overrun the project End date; click it for the driving tasks.
- Project Brief (sparkles, Pro): opens the AI-narrated "what should I worry about?" brief built from the risk and baseline engines.

> **Tip** Click a navigator badge repeatedly to step through each affected task in turn.

Over-Allocation & the Percentage

Every assignment carries a work-% (default 100%): how much of that person's capacity the task takes. On any calendar day, a person's load is the SUM of their work-% across all of their tasks active that day, so 300% means three full-time tasks overlap. Anything over 100% counts as over-allocated. Only live work consumes capacity; Completed and Cancelled tasks never count. You can see overloads in the amber 'over-allocated' header badge (click to step through the affected tasks) and the hatched amber segments on the bars marking exactly which days overlap. Days where the work physically can't fit also carry an always-on red diagonal hatch, distinct from the amber overlap segments. Click an over-allocation chip to open a breakdown popover listing the overlapping tasks and each person's work-% for the peak day, with a one-click "Level this overload with AI" suggestion. To fix one: move the overlapping tasks apart, lower the person's work-% on a task (in the task's assignee settings), or reassign one of the tasks.

Baselines: Capture & Compare

A baseline is a frozen snapshot of the schedule you can compare the live plan against. Use the Baseline menu to capture one, switch the active baseline, and toggle the grey 'ghost' track that shows each task's baselined position beneath its current bar. The Variance column and the header 'changed' badge then highlight what has slipped.

While the ghost track is on, drifted bars also show a small ±Nd chip past their end (rose when the task ends later than planned, emerald when earlier), the same working-day slip the Variance column reports.

Managers can also Restore from a baseline (in the same menu): after a confirmation, every task's DATES are set back to the snapshot. Restore is schedule-only - progress, status and assignments are left exactly as they are (tasks added since, or summary rows, are skipped; summaries re-roll from their children).

The Baseline menu holds: Capture a baseline, a Show baseline on timeline switch (the ghost track), Compare against one of the captured baselines or None, Generate report as Excel or PDF (managers, Pro), Restore, and Delete this baseline. The menu is hidden on narrow screens.

Task-List Header Tools

Small buttons sit in the task-list header above the rows:

- **Show/hide columns**: tick the columns you want; Reset columns puts the default set back
- **Auto-fit all columns to content**
- **Scroll to the selected task**
- **Add task at end**
- **Collapse list to the Task Name column** / **Expand list to show all columns**: the quickest way to give the timeline more room and get the table back

Right-click the bar for the same actions by name, handy in a small window where the icons are tiny.

Each row also has an Actions menu (the ... button at the right end of the name, shown on hover) with Edit task, Edit description, Move up / Move down, Add task below, Add milestone below, Duplicate (with subtasks), Promote / Demote, Locate in timeline and Delete task.

The Bar's Right-Click Menu

Right-click a bar on the timeline for: Edit task, Status, Priority, the Connection gap submenu (Pro), Assign to (managers), Convert to milestone / task, a Scheduling section for the whole plan (the two Maintain gap on move switches and the default gap; locked behind a Pro row on the free plan), Info on hover (what the hover overlay shows), and Delete. Double-clicking a bar opens the task window. Bars take the keyboard focus when clicked but are not Tab stops: **Tab** moves on to the next control, and the task list is the keyboard's way to the tasks.

What the Drag Readout Shows

While you move or stretch a bar, pills follow it: the start and end dates (Mar 3 → Mar 14), the working-day length with the change you are making (21 days · +3d, or 19 days (−2d)), and for a progress drag the done share (60% · 3/5d). Drop, and the same numbers go into the task. On Pro a ghost of every task the cascade would move draws under its bar before you drop; a predecessor's name and its Ends date show on a bar that is about to break a link.

Drawing and Editing Dependencies on the Chart

Hover a bar and small circles appear at its ends. Drag from one onto another task: the end you started from and the half of the target you drop on decide the type.

Drag from	Drop on the target's	Type
the end circle	right half (its finish)	Finish → Start (FS)
the start circle	left half (its start)	Start → Start (SS)
the end circle	left half (its start)	Finish → Finish (FF)
the start circle	right half (its finish)	Start → Finish (SF)

On the free plan only FS is available; the other three open the All Dependency Types upgrade dialog. The Deps column in the task list (hidden by default) lists each task's predecessors and lets you add one by picking a task; the Gap column edits the gap. Click an arrow to select it (**Del** removes it, **Esc** deselects); right-click a circle for Delete connection.

Over-Allocation Chips

Amber hatched segments on a bar mark the days on which one of its assignees is over capacity; a red diagonal hatch marks days where the work cannot physically fit. Click a chip to open the breakdown: the overlapping tasks, each person's work-% on the peak day, and a Level this overload with AI button (Pro) that asks the assistant for concrete moves. Time off counts as zero capacity, so work scheduled on someone's day off shows the same warning.

Undo & Redo

All task changes support undo and redo. Press Ctrl+Z to undo the last action or Ctrl+Y (or Ctrl+Shift+Z) to redo. The undo/redo buttons are also in the app header. Works for edits, deletions, reordering, and status changes, including multi-task operations, which undo as one step.

History Panel: Jump Back in Time

The clock icon in the app header (next to Undo/Redo) opens the History panel: a timeline of your recent edits. Steps you could redo sit dimmed above a "You are here" divider; your past actions run below it, newest first. Each row shows what happened (move, edit, delete, assign, an AI action…), where it happened (a page chip for actions taken on other pages), and when.

Click ANY step to jump the whole plan there. The app replays the undos (or redos) for you, so you don't have to hammer Ctrl+Z. Jumps of more than a few steps ask for a quick confirmation first.

> **Tip** Made a mess five edits ago? Open History and click the last step that looked right.

3D Timeline Show

The cube button in the Gantt toolbar flips the same plan into a cinematic 3D scene (the floating pill at the bottom-right is the EXIT button, shown once you are in 3D): bars become blocks you can fly around, great for presentations and reviews. It's a read-only mirror: nothing you do in 3D edits the plan. Press Esc (or the Exit 3D pill) to return.

Controls overlaid on the scene:

- Lens switcher (top-left): Normal, Baseline (floor imprints: red where a task runs late vs the baseline, green where ahead), and Critical (the zero-slack chain glows amber, the rest dims)
- Assignee figures toggle: show who owns each bar
- Save view / Reset view: keep your favorite camera angle; it's restored next time
- Settings gear: a live theme panel (bars, floor, lighting, bloom, milestones and more) with Save-as-default

Move with the mouse: drag to rotate, right-drag (or two fingers) to pan, scroll to zoom. The scene's scrollbars scroll the real chart underneath, so 2D and 3D always look at the same window.

> **Tip** 3D is part of the Pro plan. On free plans the toolbar cube carries a Pro ring and opens an upgrade preview.

Swimlanes by Group

The two-people icon in the Gantt toolbar (Swimlanes by group) regroups the same chart into one lane per group. It is free on every plan; the people-icon assignee swimlanes next to it are Pro.

How the lanes are built:

- One lane per group that actually has tasks, in the same order as the Team page, with the No group lane last
- Only leaf tasks are placed in lanes. Summary tasks are structure, so they are not shown
- A lane bar spans the earliest start to the latest end of its dated tasks, wears the group's color, and shows the aggregated progress of everything in it
- Inside a lane, tasks are listed in task-number order

Grouping is display-only: the real task tree is untouched. While grouped, structure edits (reorder, indent/outdent, insert, paste) are locked and the drag grip turns into a lock reading "Turn off grouping to reorder tasks". Everything else still works: drag bars to reschedule, edit fields, collapse lanes. Click the icon again to return to the task tree.

> **Tip** Group lanes are the fastest read on cross-team hand-offs: one glance shows where each group's span ends and the next one's begins.

What's on this screen

Control	What it does
New Task	Create a task in this project. Shortcut: press N on the Gantt page, or Shift+Enter to insert below the selected row.
Claude's project notice (free plan)	The orange View only tag, shown instead of New Task on a project Claude Code made: on the free plan it follows Claude's own work and you watch. Click it to see what upgrading unlocks: changing Claude's projects, by hand or by asking Claude.

Timeline Zoom (Day / Week / Month / Hours)	Switch the timeline's time scale. Finer scales show more detail; coarser scales show more of the project at once. Hours shows when work really happened, hour by hour, and only shows (no dragging). Week is on every plan; Day, Month and Hours are Pro, and all four are open in Claude's project on every plan. Switching keeps the date you were looking at; switching to Hours goes to now.
Go to Today	Brings the task Claude is working on onto the screen; press again for the next working task, newest first. With nothing at work, the last finished task; otherwise scrolls the timeline so today's date is in the middle.
Split / Timeline / List view	Cycle between the split view (list + chart), the timeline-only chart, and the list-only table.
Baseline	Capture a snapshot of the current schedule, then compare live dates against it. Ghost bars and a Variance column show the drift.
Deadline flags	Toggle the red deadline flags and overrun wash on the bars. A deadline is a promise date (distinct from the scheduled end); the flag goes solid when the schedule slips past it.
On-bar assignee chips	Show or hide a stack of assignee avatar discs at the start of each task bar, so you can see who owns what without reading the Assigned column.
Group by assignee (Swimlanes) (Pro)	Regroup the chart into one lane per person (a resource view). Display-only. Structure edits lock until you switch back to task-tree grouping.
Swimlanes by group	Regroup the chart into one lane per group (tasks tagged on the Team page or in the task editor; untagged tasks collect in a No-group lane). Display-only. Structure edits lock until you switch back to task-tree grouping.
Critical Path Mode	Emphasize the zero-slack chain in place: amber bars and arrows, dimmed non-critical tasks, and slack tails showing how far each task can slip.
Hours and tokens	Show or hide what a task cost after its name on the chart, like 1.4 h · 620 K: the hours recorded and the tokens Claude Code used.
Timeline mini-map	A condensed strip of the whole project above the chart. Click to jump, drag to pan both axes, resize with its edge arrows.
Header markers & legend	One dropdown to toggle which marker kinds show in the timeline header (milestone, conflict, overdue, critical, deadline, filter match, locator, phase band). Each row's swatch doubles as the legend, and the bottom section explains the rest of the ink (weekend/holiday shading, the today and project-end pills).
Filters	Narrow the chart by status, priority, group, and more (assignee, date range, progress, presets and the special toggles are Pro). A count on the button shows when filters are active; combine them with AND/OR.
Show/hide columns	The task list's column menu, in the list header (a right-click on the column header opens it at the pointer, with Hide 'that column' first): tick the columns you want (Group, Deadline, Owner, Gap, Days Left, Updated, Notes, Variance, Actual hours ship hidden), including the Move handle column (hide it to give the names its room; Move up / Move down in the row menu still reorder), or Reset columns. Your choice is saved per user.
Bulk action bar	Appears in the task-list header while rows are checked: Delete selected, Outdent / Indent selected, Edit status / priority, the gap chip, Assign selected to… (managers), Move after a task, Copy after a task, Clear selection (Esc). Each action is one undo step.

Filter logic (AND / OR)	AND shows only tasks that pass EVERY active inclusion filter (narrows the view); OR shows tasks that pass ANY of them (widens it). Exclusions like 'hide completed' always apply.
Filter mode (Highlight / Hide)	Highlight (eye) keeps all tasks visible but dims the ones that don't match, so you keep context. Hide (eye-off), the default, removes non-matching tasks from the chart entirely.
Markers	In the filter row: on top, tick markers to show only the tasks that carry one of them (every plan in Claude's project, Pro elsewhere); below, every marker the chart can show, the header strip's kinds and Claude's marks, each with a switch to show or hide it. The kinds on the chart now are lit, with how many; the rest are dimmed. Hidden kinds stay hidden on this device.
Zoom sliders (H / V)	Drag to widen the timeline columns (horizontal) or grow the row height (vertical). Double-click a slider to reset it.
Reset zoom	Puts both zoom sliders back to 100%. Shown next to the sliders on wide screens; disabled while both are already at 100%.
3D Timeline Show (Pro)	Flip the plan into a read-only cinematic 3D scene: fly around the bars, switch Normal/Baseline/Critical lenses, and save your camera angle. Esc exits.

10. Task Dependencies

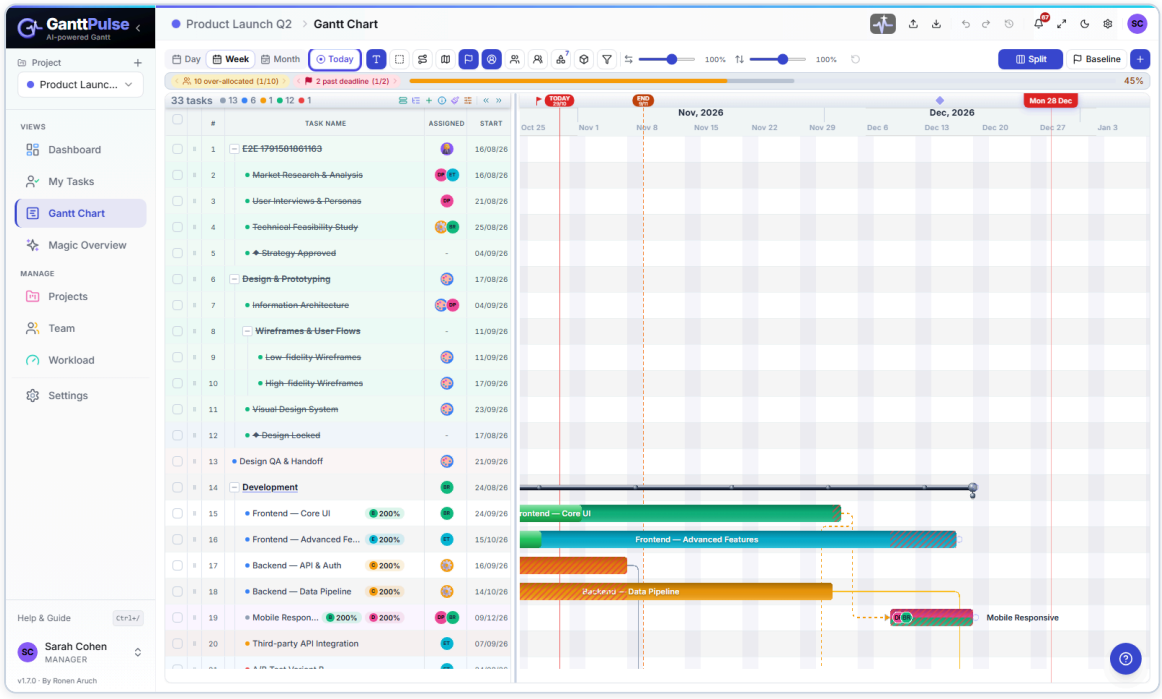


Figure 8 — Drawing a dependency — drag from a bar's edge handle toward another task and drop on it to link them.

Link tasks to define execution order, enforce scheduling logic, and visualize the critical path.

Dependency Types

Finish-to-Start is available on every plan. The other three types are Pro: on the free plan they carry a Pro ring, and picking one opens the "All Dependency Types" upgrade dialog (a request that gets through anyway is refused with "Free plan only supports Finish-to-Start (FS) dependencies. Upgrade for all types.").

4 types control the relationship between tasks:

- Finish-to-Start (FS): Task B starts after Task A finishes (the most common type)
- Start-to-Start (SS): Task B starts when Task A starts
- Finish-to-Finish (FF): Task B finishes when Task A finishes
- Start-to-Finish (SF): Task B finishes when Task A starts (rare, used for just-in-time scheduling)

> **Tip** FS covers about 90% of use cases. Use SS when two tasks should begin simultaneously, FF when they must finish together.

Connection Gap (Lag Days)

Editing a gap needs Pro: on the free plan the gap controls open the "Auto-Scheduling" upgrade dialog, and new connections are stored with a gap of 0 whatever the team default says. Every connection carries its own gap: the number of working days between the linked tasks. For example, FS with a 2-day gap means Task B starts 2 working days after Task A finishes.

On Pro, new connections take the team default from Settings > Display > Scheduling > Default gap (ships as 1 day). After that, the connection's own gap is the truth: moving tasks never rewrites it; the cascade enforces it.

Edit a gap anywhere:

- Gap column in the task list (inline for one predecessor, per-connection popover for several)
- Right-click a bar > Connection gap
- Multi-select tasks > the gap chip in the action bar (sets all their incoming connections at once)
- Settings > Display > Scheduling: changing the default offers "Apply to all existing connections" for the current project (manager only)

The task edit window's dependency rows show each link's type but have no gap control; links added there take the team default.

> **Tip** The gap is a property of the connection, not the task: a task with no predecessor shows a dash in the Gap column until you link one.

Creating Dependencies

Three ways to create a dependency:

- Visual: hover over a task bar to reveal connection handles at its edges, then drag from one handle to another task
- Form: open the task edit window, go to its dependency rows, and pick a task to add it as a predecessor; set the type per row. Rows you add or remove there are staged and written when you click Update, and one Ctrl+Z puts back every link that save removed
- Right-click a task row > Add dependency, then click the other task

New links take the team default gap; change it afterwards in the Gap column or from the bar's right-click menu (Pro).

Arrow Visualization

Dependencies display as arrows on the Gantt chart connecting predecessor and successor bars. Customize in Settings > Display:

- Arrow style: Orthogonal, Rounded, Curved, or Straight
- Thickness: Thin, Normal, or Bold
- Color-by-type: different colors for FS, SS, FF, SF
- Animations: smooth drawing effect
- Lag display: show lag values on arrows
- Chain highlight: hover to highlight the full dependency chain

Auto-Cascade Scheduling

Auto-cascade is a Pro feature. On the free plan links are still drawn and validated, but moving a predecessor does NOT move its successors - nothing happens, and that is the paywall rather than a bug.

When you move a task that has successors, the system can automatically cascade date changes through the dependency chain. Three modes (configurable in Settings > Display > Scheduling):

- Auto-cascade: always adjust dependent dates (a threshold setting makes it ask first when more than a chosen number of tasks would move)
- Ask every time: show a dialog with options before moving dependent tasks
- Manual only: never auto-move tasks; dependencies are visual only

Cascade respects dependency types, lag values, and working days.

> **Tip** Use Ask every time when you want control over which changes propagate.

Bidirectional Cascade (Gap Maintenance)

Gap tracking is TWO switches in Settings > Display > Scheduling, and they do not share a default:

- Maintain gap on move RIGHT - predecessor moves LATER, successors shift later by the same amount. This is OFF by default: unless you turn it on, moving a task later leaves its successors where they are (they only move if the dependency would be violated)
- Maintain gap on move LEFT - predecessor moves EARLIER, successors shift earlier too, keeping the current gap. This one is ON by default

Left shifts are clamped against all other incoming dependencies so a successor never overshoots another predecessor. Ghost bar previews show exactly where tasks will land before you drop.

> **Tip** Only the left-hand switch is on by default. Turn it off if you only want successors to move when a constraint is actually violated; turn the right-hand switch on to make later moves push successors along.

Validation & Conflicts

The system prevents invalid dependencies:

- Circular dependencies (A → B → C → A), including loops that run through a summary task
- Self-dependencies (a task depending on itself)
- Duplicate dependencies between the same tasks
- Links between a summary and one of its own subtasks (a summary's dates roll up from its children)
- Cross-project dependencies

When a move or a new link breaks a dependency, the Schedule Conflict dialog offers Auto-fix dates, Keep dates, show as conflict, or Cancel. After a move, Keep leaves the new dates in place; after a new link, Keep creates the link in a violated state, drawn as a red dashed arrow. On the free plan there is no dialog: the link is kept as a conflict and the dates stay as they are (a one-time toast says so). Fix a conflict by moving the tasks apart, removing the link, or (Pro) changing its gap or type.

Links the App Refuses, and Why

- A link between a summary and one of its own subtasks: Cannot create dependency: "A" is a descendant of "B". A summary's dates roll up from its children, so this dep would be unsatisfiable.
- A loop, including one that runs through a summary: Adding this dependency would create a circular dependency through a summary task.
- The same link twice: This dependency already exists.
- Moving a task under a parent when one of its links would then connect a summary with its own subtask: Cannot move "X": "Y" has a dependency with "Z", which would become its summary. Remove that dependency first, then move the task.

A member who draws a link whose auto-fix would move a teammate's task gets the link as a conflict instead, with Dependency created without auto-fix: ask a manager to reschedule.

Removing Links and Following a Chain

Right-click a task row > Remove dependencies asks once (Remove all dependencies?) and removes every link on that task; one **Ctrl**+**Z** puts them all back. Right-click > Show dependency chain turns on a filter that keeps only the tasks linked to this one, upstream and downstream; clear it from the filter row. Click a single arrow and press **Del** to remove just that link.

Critical Path Mode

The critical path is the chain of dependent tasks with zero slack: any delay on it delays the whole project. Turn on Critical Path Mode with the route-icon button in the Gantt toolbar: critical bars and their connecting arrows are emphasized in amber, everything else dims, and non-critical tasks grow a thin 'slack tail' showing how far they can slip before they become critical.

The calculation runs in working days and honors each connection's own gap and type (FS, SS, FF, SF), so it updates live as you move tasks or edit gaps. A header badge shows how many tasks are critical. Click it to jump through them.

> **Tip** Focus on keeping critical-path tasks on schedule. Non-critical tasks have float (slack) and can slip without affecting the deadline.

> **Tip** Reducing a connection's gap can pull a whole branch off the critical path. Watch the amber chain update as you edit.

11. Filtering, Searching & Groups

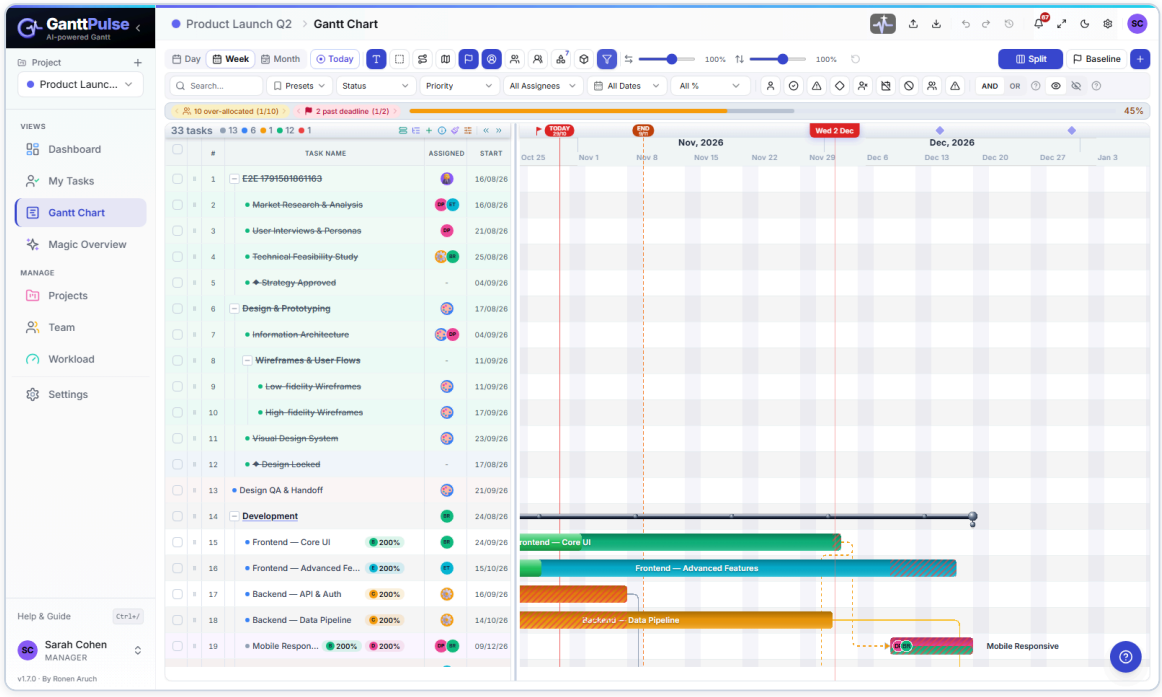


Figure 9 — The Filters panel — narrow the chart by status, priority, assignee, and more.

Filtering & Search

Find exactly the tasks you need with powerful, combinable filters.

Available Filters

Some filters are free and some are Pro. FREE on every plan: Text search, Status, Priority, Group, and the My Tasks and Hide Done toggles. PRO: Assignee, Date range, Progress, saved presets, and the special toggles below. On the free plan Assignee, Date range and Progress are replaced by one "More filters" button that opens the upgrade dialog, and the Pro toggles and presets are not shown.

Combine any of these filters to narrow your view:

- Status: Not Started, In Progress, On Hold, Completed, Cancelled
- Priority: Critical, High, Medium, Low
- Group: the group tagged on a task, plus a No group option for untagged tasks (free)
- Assignee: select one or more team members
- Date Range: presets (This Week, Next 2 Weeks, This Month, This Quarter) or custom range
- Progress: All, 0%, 1-50%, 51-99% or 100%
- Text Search: matches task names (not descriptions)
- My requests: what you typed in a Claude Code chat, per chat (free, where the project has them)
- Quick Toggles: My Tasks, Hide Done, Overdue, Milestones, Unassigned, Unscheduled, Blocked, Over-allocated, Conflicted

Filter Modes

Two modes control how non-matching tasks behave:

- Hide: non-matching tasks disappear from view entirely
- Highlight: non-matching tasks stay visible but are visually dimmed

Hide is the default. Highlight mode is useful when you want to see filtered tasks in context, for example to see overdue tasks relative to the full timeline.

Filter Logic (AND / OR)

When several inclusion filters are active, the AND/OR switch decides how they combine:

- AND: show only tasks that pass EVERY active filter (narrows the view)
- OR: show tasks that pass ANY active filter (widens it)

Exclusions like Hide Done and the date range always apply regardless of this switch.

Quick Filter Toggles

One-click toggles for common filters. My Tasks and Hide Done are free; the rest are Pro:

- My Tasks: show only tasks assigned to you
- Hide Done: hide completed and cancelled tasks. While it is on, the number beside it (last N done) keeps the N tasks finished last on the chart, with their phases: every task not done, and what was just finished. 0 hides every done task; the chip then reads Hide Done · last N kept
- My requests (free, beside Assignee, where the project has them): only the tasks made from what you typed in a Claude Code chat, in their chat's folder; Claude's own to-dos, plan tasks and messages from other chats are hidden. Which chats, beside it, picks one or more chats by name (all when none is picked); the chip shows how many, like My requests · Login page fix · 5. Only the messages that led to work become tasks: a question Claude only answered is not there
- Overdue: show tasks past their end date that aren't done
- Milestones: show only milestone tasks
- Unassigned: show tasks with no assignees
- Unscheduled: show tasks with no dates yet
- Blocked: show tasks with unresolved blocking dependencies
- Over-allocated: show tasks where someone's daily load exceeds 100%
- Conflicted: show tasks that violate a dependency

Toggles combine with other active filters. To see the critical path, use Critical Path Mode (the route-icon toolbar button). It emphasizes the chain in place instead of filtering.

> **Tip** The Blocked and Conflicted toggles are especially useful during daily standups to identify risks.

Filter Presets

Saved presets are a Pro feature. Save your current filter combination as a named preset for one-click reuse. Click the preset icon in the filter bar, name it, and save. Apply any saved preset instantly. Delete presets you no longer need by hovering and clicking the trash icon.

> **Tip** Create presets for recurring workflows: "My Overdue", "Critical This Week", "Blocked Tasks", "Sprint Review".

Active Filter Chips

Active filters display as removable chips below the filter bar, making it clear which filters are applied. Click the X on any chip to remove that specific filter. The Clear All button removes every active filter at once to reset to the default view.

Markers

The Markers button (shapes icon) in the filter row filters by marker and shows or hides each kind. On top, under "Show only tasks with" (on every plan in Claude's project; elsewhere Pro, like the other special filters, and the free plan shows it as one Pro item): tick one or more markers - milestones, conflicts, overdue, critical path, deadlines, phase bands, or one of Claude's marks - and the chart keeps only the tasks that carry one of them, by your Highlight / Hide and AND / OR settings; a "Markers: ..." chip names them, and the button is filled while it filters. Clear the marker filter, or Clear all, takes it off. Below, one list of every marker the chart can show: the header strip's kinds (milestones, conflicts, filter matches, overdue, critical path, the selected-task locator, phase bands, deadlines) and Claude's marks (Waiting for you, Not answered, Blocked, Stopped, Waiting on, Working). Click a kind to show or hide it; the list stays open. The kinds on the chart now are lit, with how many, and the rest are dimmed. Show all and Hide all switch every kind. Your choice stays on this device, and the menu is free on every plan.

Rules Worth Knowing

- Defaults: Hide mode and AND logic. Hide Done and the date range are scope limits, so they apply under OR as well.
- **Esc** closes an open filter dropdown or the presets panel.
- Four quick filters ship with the presets (Pro): My Tasks, Overdue, In Progress, Milestones; Save current filters... adds yours. Applying any preset replaces every filter, the search text included.
- Blocked means a predecessor is not Completed; a cancelled predecessor still blocks.
- Each project keeps its own filters, with Hide / Highlight and AND / OR, on this device: they are still on after a reload or when you come back to the project, and another project opens with its own (none at first). Clear all filters takes them off for good. Your column layout and grouping are saved too.
- The Magic Overview shares the same filter set and greys non-matching tasks instead of hiding them.

Text Search

Type in the search box to filter tasks by name (descriptions and notes are not searched on the Gantt). Search is instant and updates results as you type. Applying a saved preset replaces every filter, including the search text. On the My Tasks page, press / to focus the search box immediately.

Groups

Named sub-sets of your team's people, usable as a tag on tasks to group, filter and colour the Gantt.

What a Group Is

A Group is a named sub-set of the people on your team, with a color of its own (Frontend, Backend, Design). Groups belong to the workspace rather than to a project, so the same set is available in every project you open.

The rules are short:

- A person can be in several groups
- A task carries at most ONE group, or none at all
- The tag lives on the task, so it does not change when the work is reassigned
- Only managers create groups, and only managers tag tasks with them

A group is a planning label, not an access level. What someone may see or change still comes from their role (Manager, Member, Viewer) plus who owns or is assigned the task.

Groups are free on every plan. They give you a second way to slice a plan next to who is assigned: swimlanes, a Group filter, a Group column, color dots beside task names, and an optional By Group color for the bars.

> **Tip** Groups answer a question assignees cannot: "how is the Design work tracking?" stays true even after the work changes hands.

Creating and Editing Groups

> **Note** Managers only.

Groups live in the Groups card on the Team page, above the roster sections. The card shows a count next to its title, a chevron to collapse it, and one row per group with its color dot, its name, and its members as avatars.

Managers get the controls:

- New group opens the New Group dialog (in an empty card the same thing sits on a Create your first group button)
- The pencil icon on a row opens Edit Group
- The trash icon removes a group

The dialog has three fields. Name is required, holds up to 60 characters, and must be unique in the workspace. Color is one of 12 swatches. Members is a searchable checklist with the number selected shown next to the label.

The member list is a full replacement: whoever is checked when you save IS the group, so unchecking someone removes them. Anyone you can assign work to can be in a group, contractors included. Viewers are not listed, because they cannot be assigned tasks. A workspace can hold up to 50 groups.

Members and viewers see this card read-only, and only once at least one group exists.

> **Tip** Name a group after the discipline that does the work (Frontend, QA, Field crew), not after a phase - phases are already the task tree.

Tagging a Task with a Group (managers only)

Setting a task's group is MANAGER-ONLY, on both create and edit. This is a real permission, not a hidden button: the server strips the field from a non-manager's request on create, on edit, and on batch create.

Managers can set it in two places:

- The task editor's Group field, alongside Status and Priority
- The Group cell in the task list: click it and pick from the list

Both pickers offer only your own workspace's groups, and the server rejects a group id from anywhere else. The editor field is hidden entirely, and the list cell is display-only, while no group exists yet.

Members and viewers see the tag but cannot change it. In the task editor the label reads Group (manager sets) and the picker is disabled; in the task list the Group cell shows the tag and does not open.

A tag change behaves like any other edit: a Task updated toast describes it as Group changed or Group cleared, and Undo takes it back.

> **Tip** Tag the task, not the person. Reassigning a task never changes its group, which is exactly what makes group reporting stable.

What "No group" Means

No group is not a special group. It is simply a task with no tag, which is what every task starts as, and it is also how you clear a tag: pick No group in the editor field or in the Group cell.

Untagged tasks stay first class everywhere groups are used:

- In group swimlanes they collect in a No group lane, always last
- The Group filter offers a No group option that matches exactly those tasks
- In the By Group progress color they keep the neutral grey track
- They show no color dot next to the task name (the Group cell shows a dash)

Removing a group has the same effect on the tasks that carried it: they become No group and keep everything else.

Swimlanes by Group

The two-people icon in the Gantt toolbar (Swimlanes by group) regroups the same chart into one lane per group. It is free on every plan; the people-icon assignee swimlanes next to it are Pro.

How the lanes are built:

- One lane per group that actually has tasks, in the same order as the Team page, with the No group lane last
- Only leaf tasks are placed in lanes. Summary tasks are structure, so they are not shown
- A lane bar spans the earliest start to the latest end of its dated tasks, wears the group's color, and shows the aggregated progress of everything in it
- Inside a lane, tasks are listed in task-number order

Grouping is display-only: the real task tree is untouched. While grouped, structure edits (reorder, indent/outdent, insert, paste) are locked and the drag grip turns into a lock reading "Turn off grouping to reorder tasks". Everything else still works: drag bars to reschedule, edit fields, collapse lanes. Click the icon again to return to the task tree.

> **Tip** Group lanes are the fastest read on cross-team hand-offs: one glance shows where each group's span ends and the next one's begins.

Filtering by Group

A Group filter sits in the Gantt filter row, right after Priority and before the Pro filters, and it is free. The same control appears in the Magic Overview's filter panel (Overview itself is a Pro page), so a filter set on one page stays editable on the other.

It is a multi-select of your group names plus a No group option for untagged tasks, and it only appears once at least one group exists.

A summary task passes the filter when ANY task beneath it matches, so filtering by a group never hides the branch its work lives in. The filter joins the other inclusion filters under the AND/OR switch, counts toward the active-filter badge, and shows up as a removable chip reading Group: followed by the names you picked.

The By Group Progress Color

Settings > Display > Progress Bar > Progress Color offers six modes, one of which is By Group (Track in group colors). It is a personal display preference rather than a team setting, and the default is By Status.

In By Group mode each task bar's track is painted in its group's color while the completed portion stays a constant green, so how far along a task is reads the same on every bar no matter which group it belongs to. Tasks with no group keep the neutral grey track. Milestones and summary bars are not colored this way; they keep their own colors, so By Group repaints the leaf task bars only.

Because a task belongs to one group only, there are no split color bands to read here, unlike By Assignee where a shared task splits its track between everyone on it.

Where Else Groups Show Up

Beyond lanes, filters and bar colors, groups turn up in four more places:

- The Group column in the task list. It ships hidden; turn it on from the Show/hide columns button in the list header
- Color dots after a task's name: a leaf shows its own group, a summary shows the groups of everything under it (up to three dots plus a +N count), with the full names in the tooltip
- For managers, the people picker in the Assigned cell lists each person's groups under their name, so you can pick by group at a glance
- The Groups card on the Team page shows each group's members as avatars (up to six, then +N)

Group changes reach every open screen live: rename, recolor, re-member or remove a group and the lanes, filter options, dots and cards follow without a reload.

Removing a Group

> **Note** Managers only.

The trash icon on a group's row asks Remove this group? and states plainly that tasks tagged with it keep everything else and simply lose the group tag. Confirm with Remove group.

Nothing else is deleted. The group's people stay on the team with all of their work, and the tasks that carried the tag keep their dates, assignees, dependencies and history; they just become No group. Open Gantt tabs update on their own, so an untagged task simply moves into the No group lane.

If you only want to change a group's name, color or membership, use the pencil icon instead. Removing a group clears the tag from every task that carried it, and a new group with the same name will not pick those tasks back up.

Part IV — Team, Workload & Time

12. Team Management

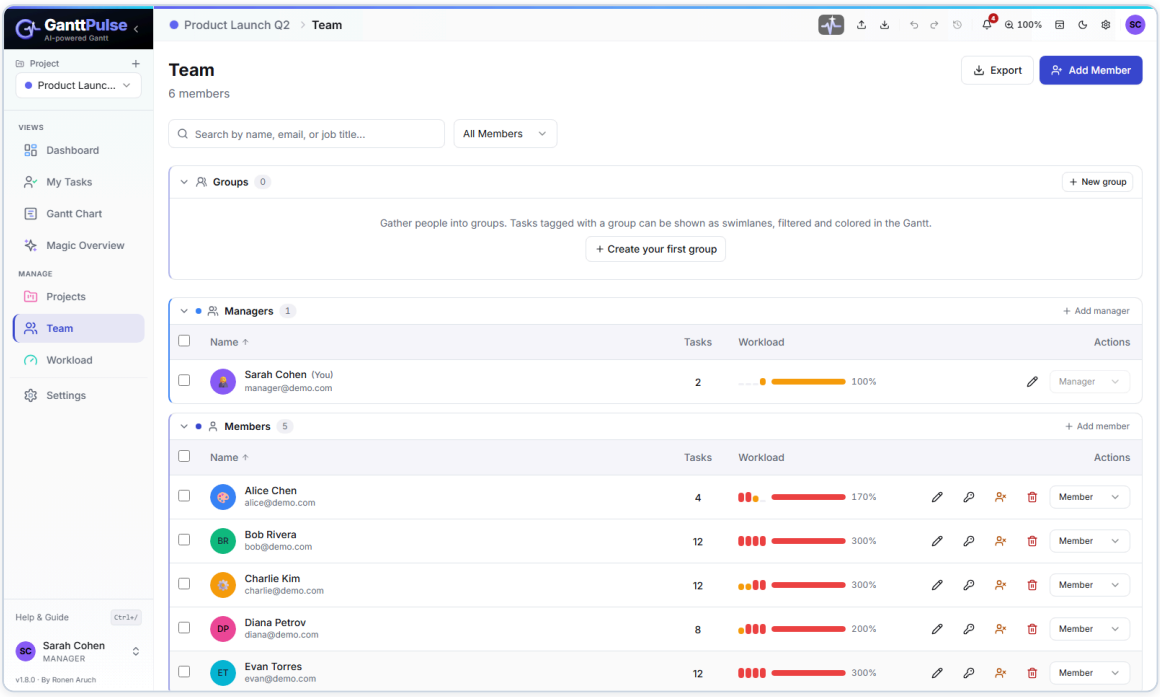


Figure 10 — The Team page — members, roles, and contractors.

Manage everyone on the team (managers, members, read-only viewers, and name-only contractors), plus roles, invites, time off, and workload.

Roster Section Cards

The roster is grouped into collapsible section cards by person type: Managers, Members, Contractors, and Viewers. Each card is a sortable table with the same columns, so people line up across sections. The page header shows seats used (only login-capable managers/members consume seats) plus separate contractor and viewer counts.

When someone's type changes (a role change, or a contractor converted to a member), their row moves to the right section and briefly flashes so you can follow it.

Each section header has its own Add button (Add member, Add contractor, Add viewer) that opens the dialog on that person type. An empty Contractors or Viewers section shows a ghost card ('No contractors yet') with the same button, and while the roster is just you a first-run nudge points at Add Team Member.

> **Tip** Collapse sections you rarely touch. The open/closed state is remembered.

> **Tip** Use the search box to find people by name, email, or job title; the Active/Inactive dropdown filters out deactivated accounts. In a narrow window that dropdown is a filter icon that opens the same choices.

Workload & Load Forecast

Each row shows the person's load-bearing task count (the same tasks the workload % counts), a workload bar with their current peak daily allocation %, and a 4-week mini-forecast sparkline so you can see load building up before it lands.

- Green: comfortable (≤80%)
- Amber: full (≤100%)
- Red: over-allocated

Click the workload bar to open the full Workload heatmap page for the whole team.

The table follows the room it has. When the page is narrow, the long bar goes first, then the Workload column, then the Tasks column. The person's detail panel still shows their tasks, and the Workload page their load.

> **Tip** Members with many overdue tasks may need help. Consider reassigning or adjusting deadlines.

Add Member / Contractor / Viewer

> **Note** Managers only.

Click Add Member and first choose what kind of person you're adding:

- Team member: can sign in and edit; uses a license seat. Provide a display name, email, and role (Member, Manager, or Viewer; Viewer is read-only, no seat). They receive a set-password invite link (emailed when email is configured, otherwise copy it from the confirmation).
- Contractor: a name-only person with no login and no seat. Just a display name and optional job title; assign them work like anyone else.

At the seat cap the dialog steers you to contractor/viewer options; those are never blocked. A Job Title is optional for everyone and shows on the roster row.

> **Tip** In the desktop login edition you can also set a username and starter password directly; email is optional there.

> **Tip** Importing a project can add its unmatched assignees as contractors in one step; see Export & Import.

Contractors & Convert to Member

> **Note** Managers only.

Contractors appear in their own section: plannable people with no login. Assign them tasks, track their workload and time off; they just can't sign in and never use a seat.

When a contractor needs real access, use the convert action (the log-in icon on their row, Convert to member in the row's ... menu when the page is narrow, or Convert to member in their detail panel): enter their email and they become a full member with the SAME identity: every task, comment, and history entry stays attached. Conversion mints a set-password invite link that lasts 7 days and starts consuming a seat. The desktop editions hide the row icon; in the desktop login edition the detail panel's Convert to member still works but shows no link: set their password with Reset password next.

Edit, Roles & Deactivation

> **Note** Managers only.

Each row has inline actions: Edit (display name, email, job title, Capacity %, avatar colour and emoji, plus a Username in the desktop login edition), a role dropdown (Member / Manager / Viewer; you can't demote yourself), Reset password, Deactivate/Reactivate, and Delete. When the page is too narrow for the icons side by side, they fold into one ... button at the end of the row, which lists the same actions by name; in a phone-size window the role is chosen in that list too.

- Capacity % (10 to 200, default 100) is the person's working capacity. Every workload, over-allocation and availability judgement is made against it, so someone at 50% is over-allocated once their day tops 50%
- Changing someone to Manager gives them full control including team management and settings, so the dropdown asks you to confirm the promotion first
- Changing someone to Viewer makes them read-only (they keep their login); it also revokes their API tokens, so a Claude Code connector they used stops
- Deactivating revokes access without deleting the account: the person is signed out at once, their sessions and API tokens are revoked, the row shows an Inactive badge, and they drop out of the pick lists (an inactive person cannot take over a leaver's tasks). Tasks and history stay intact, and you can reactivate later
- A team's last active manager cannot be demoted, deactivated or deleted. The refusal names the team; promote someone else there first

Rows also badge invite state: Invite pending (with a Resend action) and Invite expired. (Deactivate and password reset are hidden in the no-login single-user desktop edition.)

Capacity %

> **Note** Managers only.

Capacity % is the share of a full-time day a person is available for: 100 is full-time, 50 is half-time. Set it in the Edit dialog on their row, as a whole number from 10 to 200 (the default is 100). Every load judgement in the app is made against it:

- The Workload heatmap colours a cell by the person's peak load divided by their capacity, and shows 'cap N%' under their name when it is not 100
- The Team page workload bar, the Dashboard's Team Workload and Resource Heatmap, and the Gantt's over-allocation badges use the same rule, so a half-timer turns red at a lower load
- Availability ('Next free') and AI leveling plan against the same number

The roster CSV export carries a Capacity % column so you can review everyone's at once.

Time Off

> **Note** Managers only.

Open a member's detail panel to manage their time off: date ranges (with an optional note) during which they have zero capacity. Those days show a palm-tree in the Workload heatmap, count as overload if work lands on them, and are skipped by leveling suggestions.

Managers and members manage their OWN time off from their Profile (viewers cannot record time off); managers can manage anyone's from here.

Bulk Actions

> **Note** Managers only.

Select several people with the row checkboxes and a bulk bar appears: change role, deactivate, or export the selection as CSV. In a narrow window its buttons become icons, then one Actions button that lists them. The Export button in the page header downloads the whole visible roster as CSV. The CSV columns are Name, Email, Role, Active, Capacity % and Invite.

A bulk role change skips you and the contractors (a contractor is converted, not re-roled). When the server refuses some of the rest, for example a team's last active manager, the result toast reads 'N updated, M skipped (server guards)'.

Reset Password

> **Note** Managers only.

Managers can reset a member's password from the row actions or the member detail view. No password is ever emailed: the member gets a Set New Password LINK that is valid for 15 minutes and works once. If no email server is configured, the dialog shows the link for the manager to copy and pass on. The member chooses their own password from that link - there is nothing to change afterwards. (Invite links for new members and converted contractors last 7 days instead.) In the desktop login edition there is no link: you type a new password for the member (at least 4 characters); they sign in with it and can change it later.

Sign In Without Passwords (desktop login edition)

> **Note** Managers only.

The switch under the page header, Sign in without passwords, is this project file's sign-in rule. On, members sign in by picking their name on the sign-in page; Add Member then has a Needs a password to sign in checkbox, off by default, and a member added without one shows a No password badge on their row. Anyone who can open the project can sign in as any member, so use it on your own PC or with people you trust.

A member who wants a password anyway sets one on their Profile page (Set a Password), and Reset password on their row gives them one too; either way they are asked for it from then on. A manager who has no password can still turn the switch off only after setting their own (Set your own password first), and turning it off asks you to confirm when members have no password: they cannot sign in until you set one for each (Reset password).

Accounts without a password cannot create API tokens, so a Claude Code connector needs a password first. The switch exists in the desktop login edition only.

Remove Member

> **Note** Managers only.

Delete removes the person's ACCOUNT everywhere, not just from this team. The dialog shows how many tasks they own and lets you pick who takes those over (an active teammate who is not a viewer; you are the default); you type the person's name to confirm. Their task assignments, comments, time-off records and saved

presentation decks are deleted with the account; their audit history is kept, anonymised; baselines they captured go to the same person. Work on a team the chosen person is not on goes to that team's longest-standing manager instead, and the delete is refused when a team has no active manager to take it. You cannot delete the last active manager of a team.

Member Details

Click a person to open their detail panel: four stat tiles (assigned, completed, in progress, overdue), quick actions, their Time Off section, and their Assigned Tasks list (click a task to open it in the project Gantt). When a manager with a Pro license opens someone else's panel, the header also shows 'Next free: ' or 'Fully booked for the next 8 weeks'. This gives you a quick view into individual contributions and availability.

Groups

Above the roster sections, the Groups card lists the workspace's groups: a color dot, the name, and the members as avatars, with a count next to the title and a chevron to collapse it.

Managers manage them here. New group creates one, the pencil edits its name, color and members, the trash removes it. The dialog's Members list holds anyone you can assign work to (contractors included, viewers excluded), and it is a full replacement: whoever is checked when you save is the group. Names must be unique in the workspace, and a workspace can hold up to 50 groups.

A group is a planning label, not an access level. It changes nothing about what anyone may see or do; that still comes from role, ownership and assignment. Its job is on the plan: managers tag tasks with a group, and the Gantt can then be split into lanes per group, filtered by group, and colored by group.

Removing a group never deletes anything else. Its people stay on the team and its tasks simply become No group.

> **Tip** Set groups up before you tag: the task editor's Group field and the Group column stay hidden or display-only until at least one group exists.

What's on this screen

Control	What it does
Add Member (managers)	Add a login-capable team member (uses a seat), a read-only Viewer, or a name-only Contractor (both seat-free). New members get a set-password invite link.
Sign in without passwords (managers)	This project file's sign-in rule (desktop login edition). On, members sign in by picking their name and Add Member asks whether a new member needs a password. Turning it off locks out members who have none until you set one.
Search & filter the roster	Find people by name, email, or job title; the dropdown next to it filters Active vs Inactive accounts.
Roster section cards	The team grouped by person type (Managers, Members, Contractors, Viewers), each a sortable, collapsible table with workload bars, load sparklines, and row actions.

13. Time-Off & Capacity

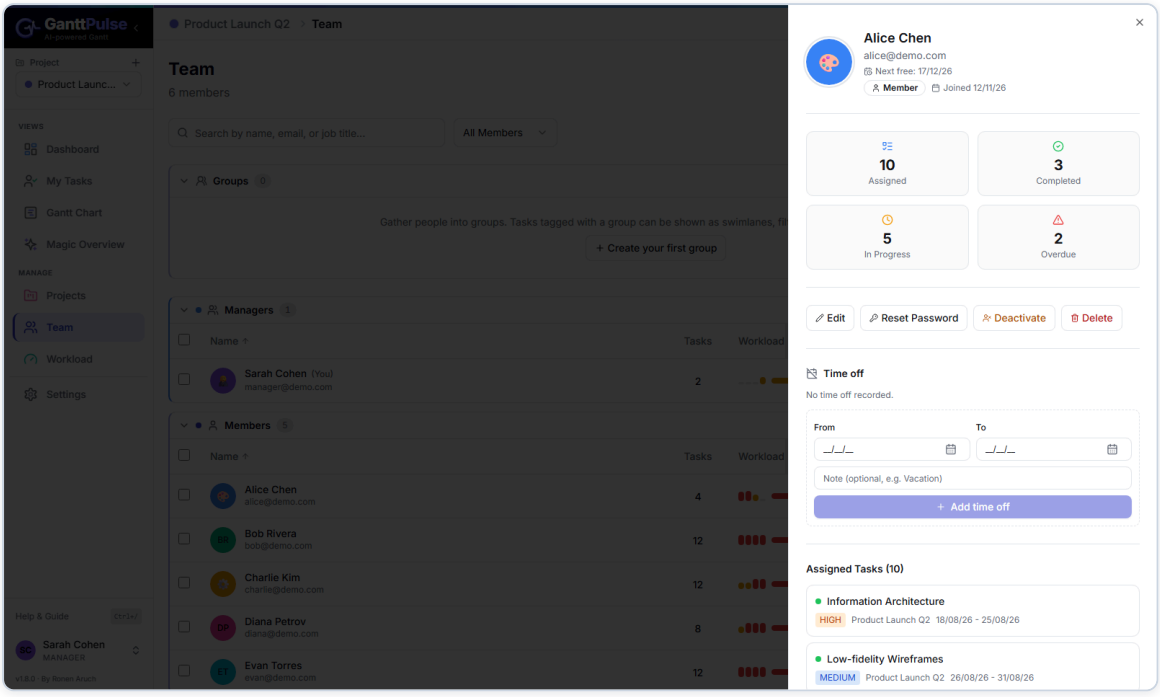


Figure 11 — A member's detail sheet on the Team page — record time off with From/To dates and an optional note.

Record vacations and other absences so workload, over-allocation, and scheduling suggestions know when someone isn't available.

What Time Off Does

A time-off entry is a date range (with an optional note) during which a person has ZERO capacity. The planning engines treat those days like personal weekends:

- The Workload heatmap shows a palm-tree on time-off days, and flags any work scheduled onto them in red
- Over-allocation checks count any scheduled work on a zero-capacity day as an overload
- Free-window and leveling suggestions route work around the absence

Time off never moves tasks by itself. It only changes what the app considers possible, so you can spot and fix collisions yourself.

Who Can Add or Remove It

- Managers and members manage their OWN time off from Profile > Time Off (viewers cannot record time off; their Profile shows the section read-only)
- Managers can also manage any teammate's time off from the Team page: open the member's detail panel and use its Time Off section

Entries are simple ranges (From / To, plus an optional note like "Reserve duty" or "Vacation"). Add as many as you need; delete one to give the days back.

Rules & Limits

- An entry covers whole days, from a single day up to 366 days in one range
- The note is optional and up to 200 characters; it is visible to managers and to the person it belongs to, and hidden from everyone else

- Adding or deleting an entry is recorded in the audit log
- Viewers cannot record time off; a contractor's time off is recorded by a manager from the Team page

Capacity is the other half of the picture: a person's Capacity % (Team page, Edit member, 10 to 200) sets what a normal day holds, and a time-off day is simply a day with zero capacity.

Where You'll See It

- Workload page: palm-tree cells on absence days; red when work overlaps them
- Over-allocation badges and banners on the Gantt and My Tasks include zero-capacity collisions
- AI leveling and "free window" suggestions skip absence days when proposing new dates

> **Tip** Recording time off BEFORE you plan a phase keeps the workload heatmap honest. Collisions show up while they're still cheap to fix.

14. Workload (Pro)

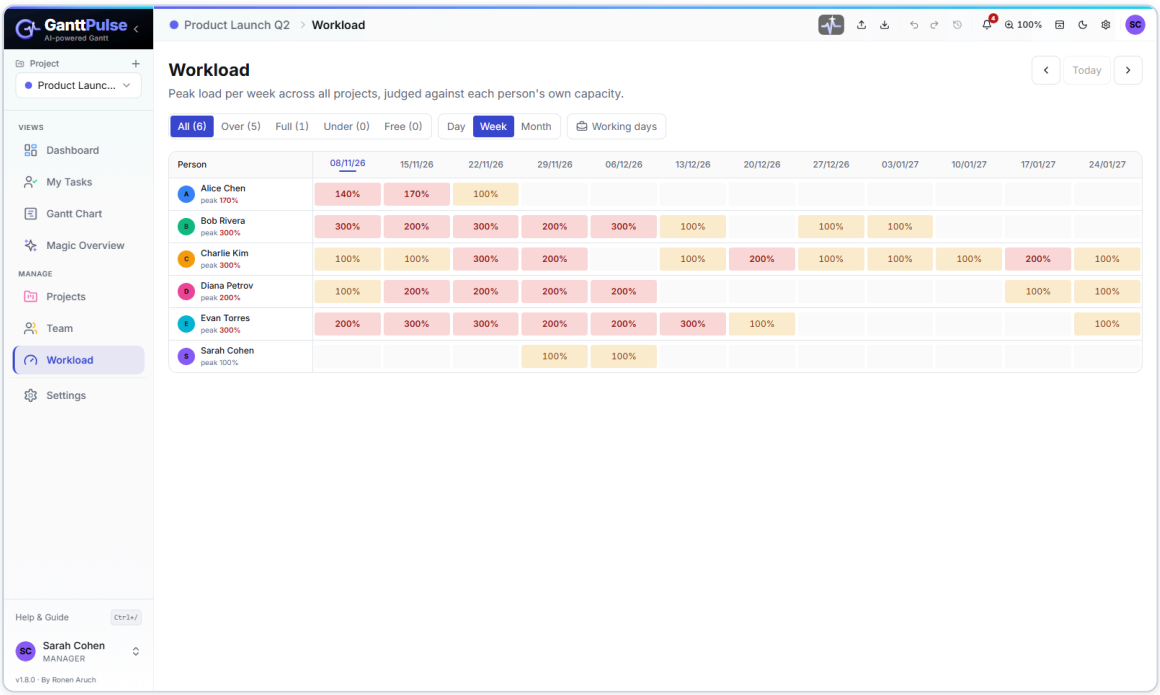


Figure 12 — The Workload heatmap — each cell is one person's peak load in one week (Day and Month are one click away).

The team capacity heatmap (a Pro feature, in the manager sidebar group): people as rows, time as columns, each cell showing how loaded that person is against their own capacity.

How to Read the Heatmap

Each row is a person; each column is a time bucket. A cell shows the person's PEAK daily load % within that bucket, judged against THEIR capacity (a part-timer's capacity may be below 100%):

- Green: comfortable (up to ~80% of capacity)
- Amber: effectively full (up to capacity)
- Red: over capacity
- A plain grey cell means nothing is scheduled there

The row header shows the person's avatar (in a narrow window the name alone), capacity (when not 100%), and their peak across the visible horizon. The names stay in place while the time columns scroll under them. The numbers come from the same engine as the over-allocation badges on the Gantt, so the two always agree.

What Feeds the Numbers

A task loads its assignees only when ALL of these hold; anything else contributes nothing, which is the usual reason a heatmap looks emptier than the plan:

- It has both a start and an end date (unscheduled work occupies no days)
- It is not finished: Completed and Cancelled tasks stop consuming capacity
- It has at least one assignee
- It is a leaf task: a summary carries no load of its own, its children do (so a lead assigned to a wide summary is not double-counted)
- It is not a milestone (a zero-work marker)

Each assignee's work % is spread flat across the task's span, across every project in your team, and summed per day. The result is judged against the person's own Capacity % from the Team page (Edit member, 10 to 200), which is why a half-timer turns red at a lower load.

Empty States & Defaults

The page opens on Week columns. Switching the granularity snaps the horizon back to today, and so does the Today button. When nothing loads anyone in the horizon the table gives way to 'No scheduled, assigned work in this horizon.'; when people exist but none passes the load filter you see 'No one matches this filter in this horizon.' A person whose work lies outside the visible horizon reads 'no work in view' under their name instead of a peak.

Load Filter (All / Over / Full / Under / Free)

The segmented control narrows the people list, with live counts (in a narrow window it is one button that shows the chosen one and opens the five):

- Over: over capacity in at least one bucket in view, or any work scheduled on a recorded time-off day
- Full: hits capacity somewhere but never over
- Under: has at least one working bucket BELOW capacity (spare room somewhere)
- Free: nothing scheduled in view

Note that Under cross-cuts the others on purpose: an overloaded person with a light week matches both Over and Under, because they both need relief AND have somewhere to put work.

Granularity & Time Paging

Choose the column size: Day (14 columns), Week (12), or Month (6); in a narrow window the three are one button that opens them. At the right of the page's title, the Earlier / Later arrows page the horizon backward or forward a full screen at a time; the Today button between them snaps back to now. The current bucket is underlined in the header.

Working Days Toggle

By default load is spread over calendar days. Turn on the Working days toggle (a briefcase icon when the window is narrow) to count load on working days only. Weekends and holidays then contribute nothing to demand or capacity, which typically makes short tasks look denser and honest.

Cell Details & AI Leveling

Click any non-empty cell to open a popover listing the tasks that create that load: each task's name, dates, the person's work % on it and its project, with a jump action that switches to that project and locates the task on the Gantt. For a person who is over capacity, a 'Level this overload with AI' button appears beside their name (a sparkle icon unless the window is wide; hover it for its name). It asks the assistant for concrete fixes (move / reduce % / reassign), worst window first.

Time Off on the Heatmap

Buckets containing someone's time off show a small palm-tree. Those days count as zero capacity. If work is scheduled onto them anyway, the cell turns red with a warning ring so you can move the work or the absence.

> **Tip** People record their own time off on their Profile; managers can edit anyone's from the Team page.

What's on this screen

Control	What it does
Load filter (All / Over / Full / Under / Free) (Pro) (managers)	Narrow the people list by how loaded they are in the visible horizon, with live counts. 'Under' finds spare room: anyone with at least one bucket below capacity.
Granularity (Day / Week / Month) (Pro) (managers)	Choose the column size: 14 days, 12 weeks, or 6 months per screen. Each cell shows the person's peak daily load in that bucket.
Working days toggle (Pro) (managers)	Count load on working days only. Weekends and holidays contribute nothing to demand or capacity. Off by default (flat calendar).
Horizon paging (Earlier / Today / Later) (Pro) (managers)	Page the visible time window a full screen at a time; Today snaps back to now (the current bucket is underlined).

Part V — Personal & Analytics Views

15. My Tasks (Pro)

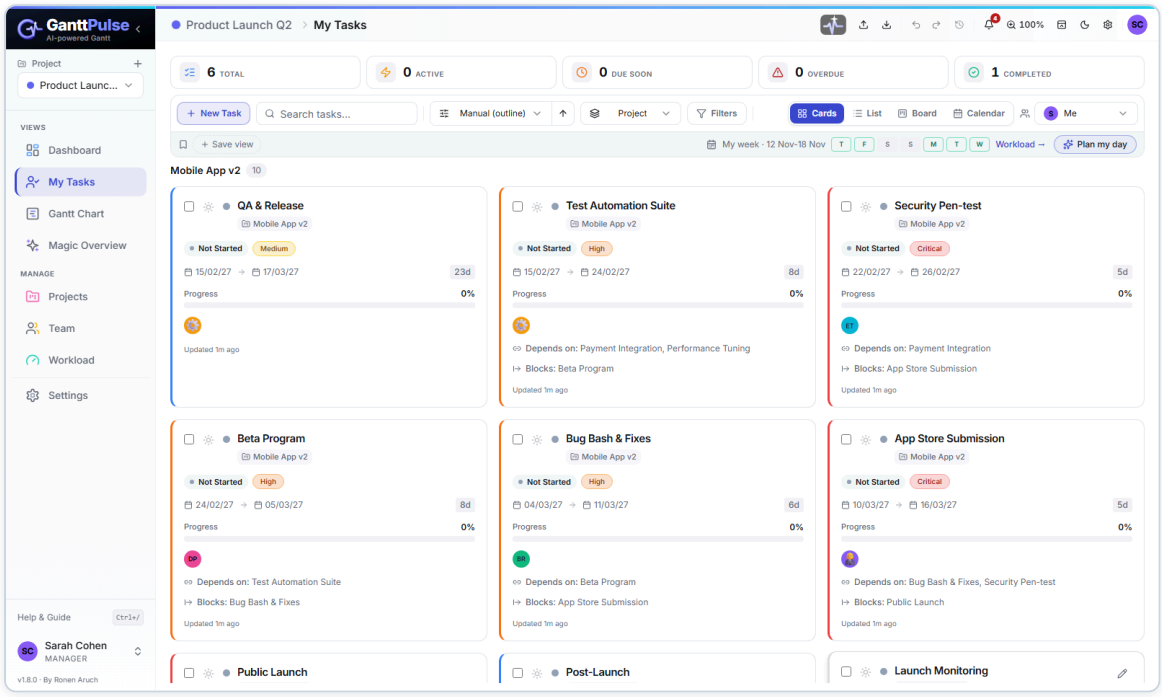


Figure 13 — My Tasks — your personal work surface.

Your personal task command center. See all tasks assigned to you across every project in one place, as Cards, a List, a Board, or a Calendar.

Cross-Project View

Unlike other pages that show one project at a time, My Tasks always aggregates every task assigned to you across all your projects, plus the parent rows above them so the outline stays intact (the Only mine filter chip hides those context rows). To narrow what you see, use the filters and search rather than a project switch, e.g. filter by status, priority, or due date.

Who Sees My Tasks

My Tasks is a Pro feature: on the Free plan the page shows a preview with an upgrade prompt instead of your tasks. Viewers never see it at all. The sidebar hides the entry for them and the app's home page sends a viewer to the Gantt, because a read-only account is never assigned work.

Stats Cards

The top row shows personal metrics: Total tasks, Active (in progress or with progress > 0%), Due Soon (due within the next 7 days, counted from today rather than the calendar week), Overdue, and Completed. Click any stat card to instantly filter your task list to that category. Click it again to clear the filter. The cards always share one line: in a narrower window each card's name moves under its number, and in a very narrow one the name becomes the card's hover text.

Four View Modes

Switch between Cards, List, Board, and Calendar views using the toggle buttons in the toolbar. Press 1, 2, 3, or 4 on your keyboard to switch quickly. (For a timeline of your work, open any task in the Gantt.)

> **Tip** Cards view shows rich task details with inline editing

> **Tip** List view has inline dropdowns for status and priority, and a click-to-type progress cell

> **Tip** Board view lays your tasks out as status columns; Calendar view draws each task as one continuous bar over the days it spans, and dragging a bar reschedules it

> **Tip** In List view, a task row's right-click menu offers 'Open in Gantt' and the row's action chip is titled 'Locate in Gantt'; both jump to the task on the project timeline

> **Tip** In a narrower window the four view buttons show their icons only (hover one for its name), and in a phone-width window they become one button that lists the four views

The Toolbar in a Narrow Window

The toolbar and the status line under it each stay on one line, and nothing on them is cut off or scrolled out of reach. As the window gets narrower, or the side menu opens, or you zoom the app in, they show the fullest form that still fits and give way in a fixed order:

- Toolbar: the view buttons lose their names, the person picker shows the person's avatar alone, 'Filters' becomes its icon, Sort and Group by become icon buttons (hover one to see what is chosen), the search box narrows and 'New Task' becomes '+'. In a small window Sort, Group by and, for managers, the person picker move under the More button (three dots) at the end of the row.
- Status line: the 'My week' caption hides, 'Workload' and 'Plan my day' become icon buttons, the saved-view chips fold into one Views button, and the seven day boxes fold into the Workload button's hover text. The 'matched' and 'over-allocated' badges always stay and give up their words last: in a small window a badge keeps its count and what it counts ('2 over-allocated'), and in the smallest its count alone. Hover a badge for all of it.

Every control keeps working in its smaller form, and widening the window brings the names back. The filter panel and the New Task row wrap onto more lines instead.

Task Cards

Each card shows status, priority, project name, dates, duration (working days), progress bar, estimated/actual hours, assignees, dependencies, notes, and a deadline flag when one is set (it turns red when the schedule overruns the hard due date). The status badge shows the effective status: if a task has progress > 0%, it shows as 'In Progress' even if the database status is 'Not Started'.

> **Tip** Click the pencil icon to enter edit mode directly on the card

> **Tip** Duration auto-syncs: change dates and duration recalculates, change duration and end date recalculates

> **Tip** Use the checkbox in the top-left corner to select tasks for bulk actions

The Today Flag

In Cards view every card carries a small sun button ('Do this today'). Click it to flag the task for today: flagged tasks leave their regular groups and gather in a pinned Today section at the top of the page, so your day's list sits above everything else. Click the sun again ('Remove from Today') to send a task back. The flag is yours alone and has nothing to do with due dates.

- Flags are kept in this browser, per person, so they do not follow you to another device
- Nothing clears them at midnight: a task stays in Today until you unflag it or it is deleted
- When a manager views a teammate, the flags set there are kept apart from the manager's own, on the manager's browser

List View: Inline Editing

The list view shows a compact table with inline editing. Click any cell to edit it without opening a detail panel.

> **Tip** Status: click to open dropdown, auto-couples progress (Completed = 100%, Not Started = 0%)

> **Tip** Priority: click to change via dropdown with color indicators

> **Tip** Progress: click the percentage to type a new value, press Enter to save

> **Tip** Duration column shows working days between start and end dates

Drag Rows to Reorder (List view)

In List view you can drag a row by its handle to a new position. The handle appears only while the Sort is Manual (outline), the default: under any other sort the order on screen is computed, so there is nothing to rearrange and the handle is hidden. Drops stay inside one project, because the order you set is that project's outline order, the same order the Gantt shows. Dropping a row onto a task from another project does nothing.

List View Keyboard

Click a row to focus it, then drive the list from the keyboard:

Keys	What happens
↓ or **J** / ↑ or **K**	Move the focus down / up (it wraps at the ends)
Enter	Edit the focused task's name
Insert or **Shift**+**Enter**	Add a task below the focused row (a sibling under the same summary, or at the end of the project)
Tab / **Shift**+**Tab**	Indent / outdent the focused row

Ctrl+**A**	Select every task in the focused row's group (all visible tasks when nothing is focused)
Ctrl+**C** / **Ctrl**+**X** / **Ctrl**+**V**	Copy / cut the selected rows (or the focused row) and paste them into the focused row's project
Esc	Clear the focus

The keys are ignored while you are typing in a field or a dialog, so they never hijack text editing. Press **/** to jump to the search box and **1** to **4** to switch views.

Row Menu & List Columns

Right-click a row in List view for its menu: Edit name, Open in Gantt, Insert task above, Insert task below, Insert milestone below, Duplicate, Convert to milestone (or Convert to task), Copy, Cut, Paste, Indent, Outdent, Copy link to task, and Delete. Items you may not use on that task are greyed out.

The list's columns are a row number, Task #, Name, Project, Status, Priority, Assignees, Work %, Start, End, Days (working days) and % (progress), plus Days Left, Owner, Updated and Notes (an icon that shows the description or note when you hover it).

Calendar View: Continuous Task Bars

Press 4 (or click Calendar in the view switcher) to lay your tasks out as a real calendar. Every task draws as ONE continuous bar covering each day of its span, from its start date to its end date, instead of a single pill on a due day. Bars are packed into lanes so they never overlap, longest tasks first, so a multi-week task tends to keep the same lane row after row. Where a bar runs past the edge of a week it is cut square with a chevron and picks up again on the next week's row.

Each bar is tinted with its PROJECT color, with a solid edge of that color at the task's true start, and it carries its state as small ornaments:

- Completed: a check, with the name struck through and faded
- Cancelled: struck through and faded
- On hold: a pause glyph
- In progress: a thin project-color line along the bottom, as wide as the progress %
- Milestone: a diamond, a single day by nature
- Deadline breached: a red outline round the bar, plus a flag icon

Hover any segment and every segment of that task lights up across the weeks. Click a bar to open the task in the detail panel; its tooltip shows the name, the project, the date range, and the deadline when it has one.

The calendar shows exactly what your filters and search leave, the same set the Cards and Board views show (the List additionally shows parent and sibling rows so the outline stays intact). A task with no dates at all has nothing to draw, so it does not appear here.

> **Tip** A task with only one of its two dates renders as a single-day bar on that date

> **Tip** Month scale fits 3 lanes of bars per day; anything past that becomes a '+N more' chip. Week scale has room for 8

> **Tip** Bars use the project color for identity, so one glance tells you which project a week belongs to

Getting Around the Calendar

The calendar header sticks to the top of the page and carries everything you need to move around:

- Month / Week: the scale toggle. Month draws the whole month grid with 3 lanes of bars per day; Week draws a single week with room for 8. Your choice is remembered for next time.
- The arrows step one month, or one week, at a time. Today jumps back to the current period and selects today.
- Jump to date: pick a date and the calendar navigates there AND selects that day.
- iCal: downloads every task your filters and search leave, not just the month on screen, as my-tasks.ics, an all-day calendar file for Outlook, Google Calendar, or Apple Calendar. Each event carries its project name; a task missing a start or an end date is skipped.

In a narrow window the header shows 'iCal' and 'Today' as icons and Month / Week as M / W, and it wraps onto a second line when it must; the weekday row stays right below it.

Clicking any day cell selects it (it gets a highlight ring) and opens a panel above the grid listing every task that covers that day, each with a status dot and its project name. Click the same day again, or the X, to clear the selection. When a day holds more bars than its lanes can show, a '+N more' chip appears under it; clicking the chip opens that same day panel, which always lists everything, hidden bars included.

Non-working days and holidays are tinted, days from the neighbouring months are dimmed, today's number is circled, and the week starts on the day you chose in Settings > Calendar.

> **Tip** The day panel is the escape hatch for a busy day: it lists the tasks the lane cap hides

> **Tip** Working days come from Settings > Calendar (managers set them for the team); holidays only pick up the red off-day tint when 'Count holidays as non-working days' is on

Dragging a Bar Reschedules the Task

Calendar bars are live, not a picture. Dragging one changes the task's dates and saves that change the moment you let go, with no confirmation step:

- Drag the MIDDLE of a bar to move the task. The whole span slides and the working-day length is preserved, so dropping it across a weekend or a holiday pushes the end date further out to keep the same number of working days.
- Drag either END of a bar (the cursor turns into a left-right arrow) to resize it. That edge lands exactly on the day you drop it on, working day or not, and the other edge stays put. Drag an edge past the opposite one and the task stops at a single day.
- While you drag, the days the task would cover are tinted and the bar itself dims. That tint is exactly where it lands.
- On release the dates are saved. A 'Task updated' toast names the dates that changed - both of them for a move, just the edge you dragged for a resize, and Ctrl+Z undoes it (Ctrl+Shift+Z redoes).

What protects you from an accidental reschedule:

- A press that travels less than 4 pixels is a click, not a drag, so it opens the task instead of moving it.
- Escape during a drag aborts it, and so does the system taking the gesture over. Nothing is written.
- The click that ends a drag is swallowed, so a reschedule never also opens the task editor.
- Dragging is mouse and pen only. On a touch screen the calendar scrolls and you tap a bar to open it.

> **Tip** Only the edge you moved is sent to the server: a resize writes one date and leaves the other one untouched

> **Tip** A drag can only reach days that are on screen. The preview sticks at the edge of the grid, so to push a task into a further month, navigate there first or edit the dates in the task detail panel

> **Tip** Milestones can be moved but not resized: a moved milestone collapses onto the day you drop it on

> **Tip** A calendar drag saves that one task's dates. The dependency cascade that also shifts successor tasks runs on the Gantt timeline, not here

Bars You Cannot Drag

A bar is draggable only when you are allowed to edit that task:

- Managers can drag any bar.
- A member can drag tasks they own or are assigned to, and nothing else.
- A viewer never drags anything; the role is read-only.

Summary tasks are never draggable, for anyone, managers included: a parent's dates are rolled up from its children, so the way to move a parent is to move its children. The calendar treats a task as a parent if anything on the page points to it as a parent or it reports children, even when its children are filtered out of view.

A bar you cannot drag simply has no grab cursor and no end grips. It still highlights on hover and still opens the task when you click it. A bar that is cut off at a week edge has no grip on the cut side either, because that is not the task's real end: go to the week that holds the true end, or edit the dates in the detail panel.

> **Tip** No grips and no grab cursor is the tell: if you can drag it, the pointer changes over the bar and thin resize zones sit at both true ends

Add a Task on a Day

Hover a day cell and a '+' appears in its corner ('Add a task on this day'). Click it and the New Task row opens at the top of the page, pre-dated to that day: the new task is a one-day task on the first working day on or after the day you clicked (a weekend or holiday click lands on the next working day), rather than the usual default span from today.

It is the same quick add the toolbar's New Task button opens, so the name tokens still apply: !critical / !high / !medium / !low for priority, #Project to pick the project by name, and today / tomorrow / a weekday like fri / a date for the due date. A due token stretches the end date while the start stays on the day you clicked, unless the due date falls BEFORE that day - then the task collapses to a single day on the due date. The line under the row shows the dropdown's project and the default start and end dates. It does not react to tokens typed into the name. It says who the task is for: 'assigned to you', or the teammate's name when a manager is adding for a teammate.

The task is assigned to you, or to the teammate you are viewing when a manager is using the person picker.

> **Tip** The '+' is a real button, so it is reachable by keyboard as well as by hovering the day

> **Tip** Closing the add row clears the day it was prefilled with, so the next New Task starts from the normal defaults

Filtering & Search

Filter tasks using the toolbar: search by text (name, description, notes), and open the filter panel for quick chips (Only mine, Hide Done, Overdue, Over-allocated), an AND/OR combine toggle, a Hide vs Highlight mode, and a progress range. A dedicated Sort dropdown (with an ascending/descending toggle) orders by Manual (outline), the default, which keeps the Gantt's outline order, or by due date, start date, priority, status, progress, recently updated, or project, and the Group-by dropdown groups tasks by project, status, priority, or due date. A 'Showing N of M' line under the toolbar says how many of your tasks the current filters leave.

> **Tip** Press / to focus the search box instantly

> **Tip** Active filter chips appear below the toolbar; click X on any chip to remove it

> **Tip** Click 'Clear all' to reset all filters at once

> **Tip** The small number on the Filters button's corner counts the filters that are on; the search counts as one

> **Tip** In a small window Sort and Group by are under the More button (three dots) at the end of the toolbar

Saved Views

Once you've dialed in a combination of filters, sort, grouping, and view mode you like, click "Save view" in the chips row under the toolbar and name it. Each saved view becomes a chip. Click a chip to restore that exact setup, click its × to delete it. Great for switching between e.g. "This week, by project" and "Everything overdue" in one click. When the line has no room for the chips they fold into one Views button: its list applies a view, has 'Save current view…', and 'Delete a view'.

Over-Allocation

When your work-% across overlapping tasks tops 100% on any day, an amber badge appears on the status line under the toolbar: "N over-allocated · up to X%". Hover it for the full sentence. It counts all your over-allocated tasks, so it stays even when your filters hide some of them, and then it says how many are shown. Click the badge to step through the over-allocated tasks in the list (Shift+Click for the previous one), and use the Over-allocated filter chip to isolate them. Each affected task carries an allocation chip showing its share. Spread the tasks apart or lower a work-% to clear it.

Bulk Actions

Select multiple tasks using the checkboxes on cards or list rows. A bulk bar appears above the pane (in List view it sits in each group's status bar) with batch operations: change status, change priority, mark all complete, delete, Copy / Cut / Paste, and Indent / Outdent. A manager viewing their own tasks also gets Assign to. Click 'X' or press Escape to clear the selection.

Quick Add with Natural-Language Tokens

Click '+ New Task' to open an inline add row. You can fill the dropdowns, or just type everything into the name:

- !high / !critical / !low: sets the priority
- #Project: picks the project by name
- fri / today / tomorrow / a date: sets the due date

For example: "Draft launch email !high #Website fri". The tokens are stripped from the final name, override the dropdowns, and the task is assigned to you (or to the teammate you are viewing) with a default span from the first working day on or after today to five working days after today, so it appears in the list immediately.

Plan My Day

The "Plan my day" pill opens your personal brief: overdue work, what lands today and this week, and any days where your combined load tops your capacity, across ALL your projects. It's computed by the app's own engines (no AI quota used) and refreshable on the spot. Start your morning here, then jump straight into the tasks it points at.

My Week Strip

A slim 7-day strip shows each day's load at a glance in four states: off-day, free, partly booked, or full (which also covers over-booked). Hover a day for the exact percentage. It uses the Workload page's timeline math but judges every day against a flat 100% and does not know about your time off, so the Workload page and the Dashboard, which use your real capacity and time off, can show a different picture.

Viewing a Teammate (Managers)

> **Note** Managers only.

Managers get a person picker in the toolbar to view a TEAMMATE's My Tasks (their cards, list, and availability) to prep a 1:1 or find room before assigning work. In a narrower window the picker shows the person's avatar alone (ringed while it is a teammate's), and in a small window it is the 'Tasks of' line under the More button. Quick-added tasks in this mode go to the viewed person. Messages and filters on the page name the teammate ("Only theirs", "Alice's week"); Plan my day stays your own brief. While you are viewing someone else, a banner at the top of the page reads 'Viewing ' with a Return to me button that brings your own tasks back.

Task Detail Panel

Click any task in any of the four views (Cards, List, Board, or Calendar) to open the full detail panel on the right side. From here you can edit all fields, manage dependencies, and see the full task history. Press Escape to close the panel.

What's on this screen

Control	What it does
New Task (Pro)	Quick-add a task from My Tasks without leaving the page. It's assigned to you, or to the teammate you are viewing, with default dates so it shows up immediately.
Cards / List / Board / Calendar view (Pro)	Switch between four views: rich Cards, a compact List with inline editing, a status Board you can drag cards across, and a Calendar of continuous task bars. Press 1 to 4 to switch quickly.
Search (Pro)	Filter your tasks by name, description, or notes. Press / to jump straight to the search box.
Sort (Pro)	Order your tasks by Manual (outline, the default), due date, start date, priority, status, progress, recently-updated, or project. The arrow button flips ascending/descending.

Group by (Pro)	Group your tasks by project, status, priority, or due date. Or pick no grouping for a flat list.
Filters (Pro)	Open the filter panel for quick chips (Only mine, Hide Done, Overdue, Over-allocated), an AND/OR combine toggle, Hide vs Highlight mode, and a progress range.
More (Pro)	In a small window Sort, Group by and, for managers, the person picker move under this button, so the toolbar stays one line with nothing cut off. Each line shows what is chosen now.
Saved views (Pro)	Save the current filters + sort + grouping + view mode as a named chip, then restore the whole setup with one click. Delete a view with its ×. In a narrow window the chips fold into one Views button with the same choices in a list.
Plan my day (Pro)	Your personal brief: overdue work, today's and this week's landings, and days where your load tops your capacity, across all projects. No AI quota used.

16. Dashboard & Analytics (Pro)

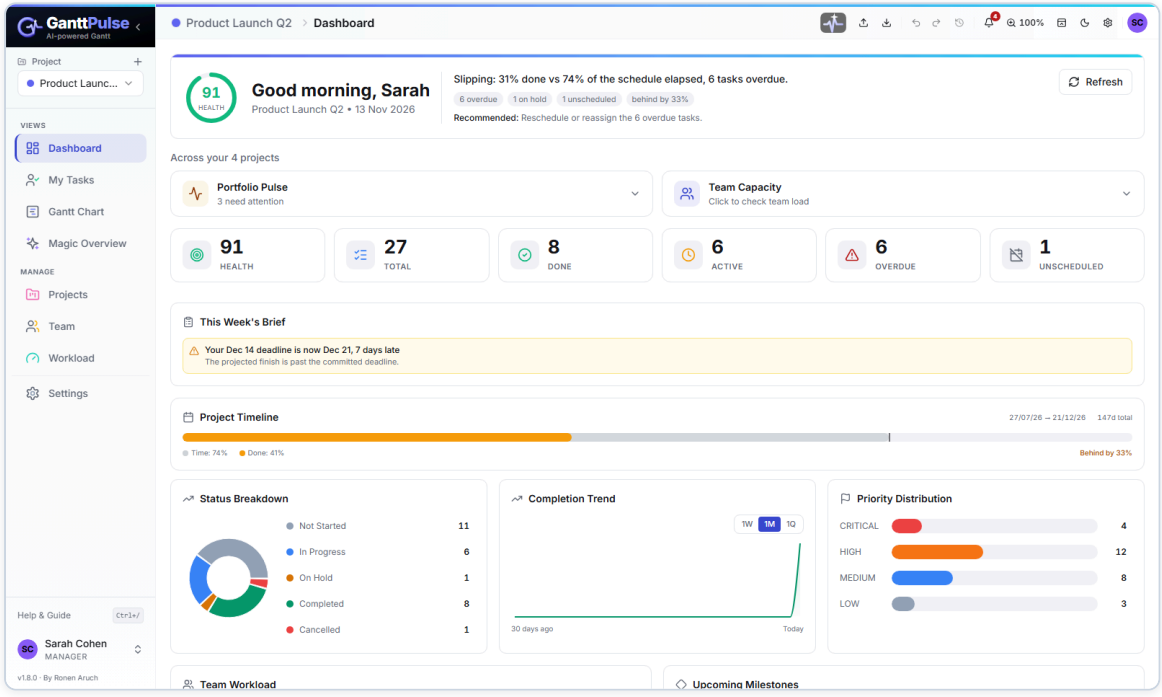


Figure 14 — The Dashboard — health, KPIs, and project analytics at a glance.

Executive overview of your project health. See key metrics, trends, workload distribution, and items that need immediate attention.

Before You Have a Project

With no project open the Dashboard shows a welcome screen instead of cards. A manager gets three ways in: Create your first project, Generate a sample project, and (when import is available) Import a project. A member sees 'No project yet' with a note that their manager will add them to a project, and a Go to My Tasks shortcut when My Tasks is licensed.

In Claude's file (claude.db) the welcome is about Claude Code instead: it says that plans there come from Claude Code, offers Connect Claude Code (the same form as Settings > Claude Code) or, once connected, what to ask Claude. It offers no project by hand and no sample there: plans in that file come from Claude. With the app bars

hidden it also says how to reach Settings (the strip at the top of the window, or Ctrl+Shift+Space).

The sample is a REAL project, Website Relaunch, with a dozen tasks, a hierarchy, dependencies and a milestone, rebased to today. It counts toward your plan's project cap (1 on Free) and its tasks toward the per-project cap (15 on Free), so on the Free plan it uses up the project allowance. Delete it from the Projects page when you are done exploring.

Project Pulse (hero)

The hero at the top greets you and headlines the open project: its name, a big health figure, and the key stats, with a refresh control. It's the one-glance answer to "how is this project doing right now?" before you read the cards below.

Getting Started Checklist

> **Note** Managers only.

On a project with no tasks yet, a Getting Started checklist walks a manager through the first steps: Create a project (already done), Add your first task (opens the Gantt), and Invite your team (optional). It disappears on its own once the project has a task. Dismissing it with the X hides it for good on this browser, for every project.

Portfolio Strip

> **Note** Managers only.

For managers with several projects, a strip above the cards pivots across ALL of them: the same two summary cards as the Projects page, Portfolio Pulse (how many projects need attention or finish soon) and Team Capacity. Click a card to expand its detail; clicking a project in the Pulse list makes it the active project and opens it in the Gantt.

Stat Cards

The top row shows 6 key metrics: Health score, Total tasks, Done, Active, Overdue, and Unscheduled. Click any card to drill down. A detail panel opens below showing the specific tasks in that category.

> **Tip** The Health score is a 0-100 Schedule Health score built from four weighted factors: on time, progress pace, critical-path health, and blocked load. It is the same score the Magic Overview shows. 70 or above is good, 40 to 69 is a warning, below 40 is critical. Click the card to see each factor and why it scored as it did.

> **Tip** Health shows a dash, and its drill-down says 'Not yet scorable', while none of the project's tasks have dates. Give a few tasks start and end dates and the score appears.

How Much Each List Shows

The dashboard lists are capped so the page stays quick. Each shows its most urgent rows, and a 'View all in Gantt' link under a capped list opens the full, filtered set on the timeline:

List	Rows shown
Overdue, Due This Week, Upcoming Milestones, Needs Attention	5
My Tasks card	8

Recently completed, Active, Unscheduled (the stat-card drill-downs)	10
Resource Heatmap	6 weeks across, up to 6 people, the most overloaded first

This Week's Brief

A ranked list of this week's findings for the open project (deadline risks, baseline slips, and all-clear notes), each row colored by severity (red critical, amber warning, green info). The findings come straight from the app's risk and baseline engines, never invented. Click a finding to open the task behind it.

Project Timeline

One dual-track bar compares calendar time with work completion: the grey track shows how much of the project timeline has elapsed (with a marker at today), the coloured fill shows the share of work completed, and the labels below give both percentages. When completion trails elapsed time the fill turns amber and a 'Behind by N%' label gives the gap, a sign you may need to accelerate or adjust scope.

Status Breakdown

Donut chart showing how many tasks are in each status: Not Started, In Progress, On Hold, Completed, and Cancelled. Hover over segments to see exact counts, and click a slice (or a legend row) to jump to the Gantt filtered to exactly those tasks.

Completion Trend

Area chart tracking the number of tasks completed per day. Use the 1W / 1M / 1Q period toggle in its corner to widen or narrow the window (1M is the default). A rising line means the team is accelerating. A flat line signals work has stalled. Use this to spot momentum shifts early.

Priority Distribution

Bar chart showing how many tasks fall into each priority level: Critical, High, Medium, and Low. Click a bar to open the Gantt filtered to that priority. Helps you check whether the team is focused on the right things.

> **Tip** If most tasks are Critical or High, consider re-prioritizing. When everything is urgent, nothing is.

Team Workload

Shows each member's peak daily allocation % across their tasks (counted across projects), turning amber or red when someone is over capacity. Use it to spot who is overloaded and who has room, and rebalance work before bottlenecks form.

Resource Heatmap

A compact people × weeks grid showing each person's peak allocation per week: green comfortable, amber full, red over. It's the dashboard-sized cousin of the full Workload page: use it to spot a hot week at a glance, then open Workload for the full picture and the tasks behind it. The grid is six weeks wide and shows up to six people, the most overloaded first; the rest are on the Workload page.

Baseline Variance

Appears once the project has a baseline: "N tasks behind baseline · project +Xd": how many tasks slipped versus the active snapshot, the project-end drift in working days, which baseline it compares against, and the worst-slipping task. Behind/ahead chips give the split at a glance.

Slips use the same working-day formula as the Gantt's Variance column and the comparison report, so all three always agree.

> **Tip** Red drift means the project end moved later than planned; green means you're ahead of the snapshot.

Deadline Forecast

Compares the project's PROJECTED finish (from the live schedule) against its committed deadline and says it plainly: on track, cutting it close, or projected to overrun by N working days, with the driving tasks listed. This is the early-warning card: it turns red BEFORE the deadline passes, while there's still time to act.

Needs Attention

Highlights active tasks that are overdue (past their end date without completing), on hold, or without an assignee, worst first and each with its reason. These are the items that need immediate action to keep the project on track.

Hours Tracking

A ring showing actual hours logged as a share of estimated hours, with an Estimated / Actual / Remaining table and a utilization bar beside it. Helps identify tasks taking longer than planned so you can adjust estimates or reallocate resources.

My Tasks Card

Shows a short list of your active tasks in the current project, soonest due first. Click any task to view its details. For a full cross-project view of your work, visit the My Tasks page from the sidebar.

Due This Week

Lists active tasks due within the next 7 days, counted from today rather than the calendar week. Keeps you on top of upcoming deadlines without opening the Gantt or applying filters.

Upcoming Milestones

A clickable list of the project's milestones with how many days are left (or how overdue they are, or whether they're done). Click one to open it. Milestones are the checkpoints stakeholders ask about, so they get their own card.

What's on this screen

Control	What it does
Stat cards (Pro)	Health (a graded score, a dash until the project has dated tasks), Total, Done, Active, Overdue and Unscheduled. Click a card to open its drill-down list below.
Project Pulse (Pro)	The health hero card: overall score, schedule and workload signals at a glance. The score is the 0-100 Schedule Health score from four weighted factors: on time, progress pace, critical-path health, blocked load.

This Week's Brief (Pro)	Ranked findings for the week (deadline risks, baseline slips, all-clears), colored by severity. Click a finding to open its task.
Analytics charts (Pro)	Status breakdown, daily completion trend, and priority distribution for the current project.
Team Workload (Pro)	Each member's peak daily allocation % (amber/red when over capacity). Spot who is overloaded or has room. Click a member on the Team page for details.
Resource Heatmap (Pro)	People × weeks peak allocation at a glance: green comfortable, amber full, red over. The full story lives on the Workload page.
Baseline & Deadline cards (Pro)	The plan-vs-reality footer: how far tasks drifted from the active baseline, and whether the projected finish still lands before the committed deadline.

17. Magic Overview (Pro)

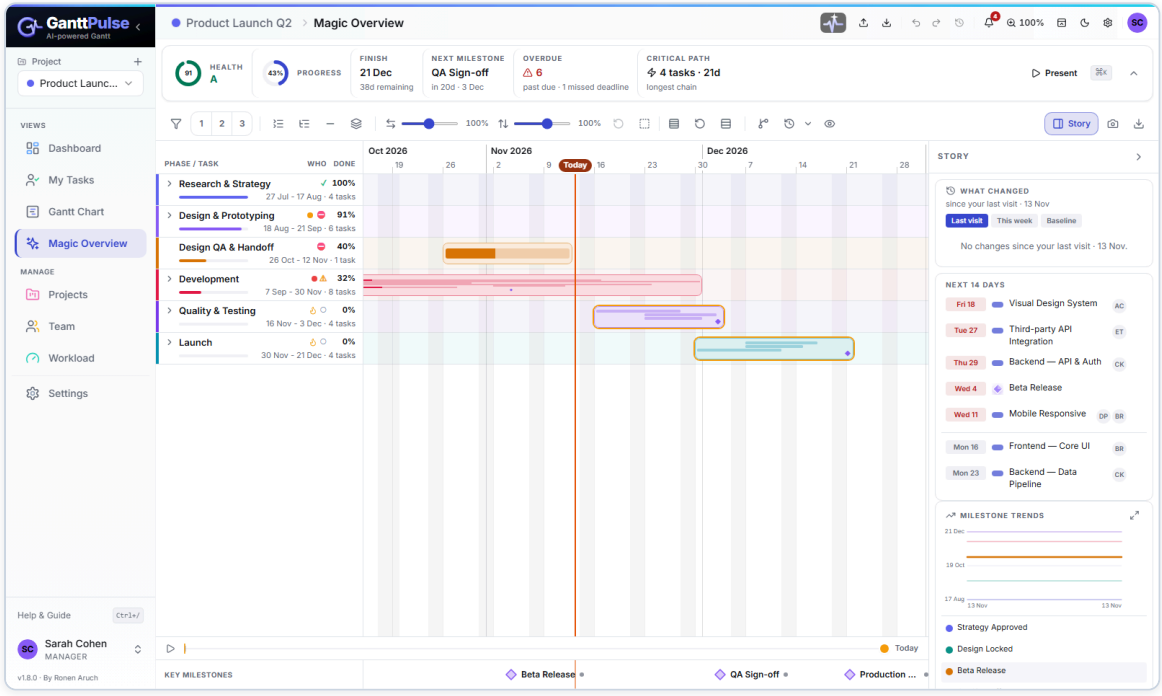


Figure 15 — Magic Overview — the presentation-grade board with health score, story rail, and timeline.

A presentation-grade, bird's-eye canvas of the whole project: a health score and pulse up top, phases and tasks laid out across time below, with dependency connections, a time-travel scrubber, and one-click presenting and export. Built for sharing the big picture, not editing individual tasks.

What the Overview Shows

Each summary (phase) is a lane across the timeline. Folded, the phase is a capsule holding one stripe for each of its tasks, each stripe at the task's own days with its done part filled. Open, it is a flat summary bar with a row for each task under it: a bar in the task's colour whose done part is filled, a diamond for a milestone, a small flag at a task's deadline. It is the same data as the Gantt, drawn for reading and presenting rather than editing.

The names column left of the chart lists every phase and, under an open phase, each task on the same line as its bar, with the people on it and how much is done; click a task's row to bring its bar into view. In a narrower window the column shows names and percents only, and in a window with no room for it each phase gets a title line and

each task its name on a line above its bar. The column and the date axis stay in place while the chart scrolls, and the axis keeps the month you are looking at named at its left edge.

The chart opens with today in view, a third of the way in. It's a Pro view; open it from the Magic Overview entry in the sidebar (or through Ctrl+K from any other page).

Health Score & Pulse

A card strip above the canvas leads with an explainable health ring: a 0-100 Schedule Health score built from four weighted factors (on time, progress pace, critical-path health, and blocked load), graded A to F, the same score the Dashboard shows. It then summarizes progress, the project's finish date ('No end date yet' until the project or its tasks have one), the next milestone, the overdue count, and the critical path. Click the health ring to open the factor cards that show exactly why the score is what it is and jump to the offending tasks. Most cards are clickable to locate or scroll, and the strip collapses to reclaim space (the choice is remembered on this device, and the collapsed strip keeps a compact Present button).

In a short window the strip stays on one line: it drops the cards' second lines first, then their labels, and the cards it has no room for move under a More button.

Time Travel

Drag the amber playhead on the time rail (or press play) to rewind the whole board to any saved checkpoint or baseline. The canvas re-renders 'as of' that date, with an on-screen banner showing the date you're viewing. Click Today (or Esc) to return to the live plan.

The rail appears only once the project has history to travel to: automatic checkpoints or baselines you captured. A fresh project has none, so the rail is simply absent. While you are viewing 'as of', the board is built from that frozen snapshot, so teammates' live edits do not repaint it until you return to Today.

Story Rail

A side panel tells the project's story: what changed versus the baseline (narrative diff), what's due in the next two weeks (lookahead), and how each milestone's forecast finish is trending over time (milestone trends). It turns the raw board into a few sentences you can read aloud in a standup.

Open and close it with the Story button on the toolbar. It sits beside the chart while the window has room for both; in a shorter window it opens over the chart's right side, and **Esc** closes it.

Command Palette

Press Ctrl/Cmd + K (or the ⌘K button in the pulse strip) to open the Overview's own command palette: jump to any phase or upcoming milestone, spotlight a milestone's dependencies, toggle a layer (critical connections, all connections, text labels, merged rows, stacked leaf tasks, the story rail, the overdue filter), apply a saved preset, or start presenting, all from the keyboard without hunting through the toolbar. Rows are grouped under Jump, Spotlight, Toggle, Presets and Stage, and typing filters them by label.

This is not the app-wide palette. On every other page Ctrl+K opens the global command palette, which runs the application menu commands (Go, View, Tools, Settings). The global one stands down here so the two never fight over the key, so while you are on the Overview these board commands are all Ctrl+K gives you.

> **Tip** Running any command closes the palette, so the on/off badges next to the toggle rows are never stale.

Presentation Mode

The Present button launches a full-screen, scene-by-scene walkthrough of the board built from the same live data. Advance with → or Space, go back with ←, and exit with Esc. Use it to drive a status meeting straight from the app instead of exporting slides.

Present needs dated tasks: until some tasks have both a start and an end date the button is greyed and its tooltip reads 'Present needs dated tasks. Give some tasks start and end dates first.' A running show ends on its own if the last dated task loses its dates while you present.

Hover Card & Right-Click Menu

Hover a bar for its card: the task's name, dates, duration, progress, assignees, a critical-path mark and the deadline when it has one. Double-click a task's bar or a milestone to open it in the Gantt. Right-click a bar for its menu: Open in Gantt, Open task details (the Gantt with the task's window open), and Copy task ID. A click on a phase's or a summary's bar opens or folds it.

Every bar is a button the keyboard reaches with **Tab**. **Enter** or **Space** on a phase or a summary opens or folds it; on a task or a milestone it brings the bar to the middle of the chart, flashes it and opens its card, and **Esc** closes the card.

What Esc Does

One press of **Esc** undoes one layer, in a fixed order: it clears a spotlight first, then ends a presentation, then returns a time-travelled board to Today. Press it again for the next layer.

Connections & Critical Path

The connections button cycles how dependency links are drawn: none (clean), critical-path only (the chain that drives the end date, highlighted as a flowing highway), or all connections. Use critical-path mode to see what's actually controlling your finish date.

Baseline Ghost (As-Promised)

Turn on the ghost toggle to draw a dashed outline where the 'as-promised' baseline had each bar, behind the live bar, so slippage from the plan you committed to is visible at a glance. A phase or a summary whose finish moved by two working days or more also gets an arrow above its bar, from the planned finish to the live one: red when later, green when earlier. Pick which baseline to compare against from the adjacent menu. With a baseline selected, each milestone label also gets a slip chip: +Nd when the milestone is later than the baseline, -Nd when earlier, and a small dot when it is on time.

Row Density & Zoom

Tighten the canvas for an overview at a glance: 'Stack leaf tasks' collapses a summary's leaf tasks onto one line; 'Merge all rows' compresses everything into a single band per phase; the row-density buttons make rows tighter or looser (tighter rows close in until their bars touch, never over each other). Horizontal and vertical zoom sliders (double-click to reset) and marquee-zoom (drag across a time range to fit it to the screen) control how much you see. The row-height slider changes the rows and the bars; text keeps its size, and rows too low for text carry none. With rows stacked or merged onto one line, the names column lists the phases only.

In a window too short for the whole toolbar, a group of buttons moves into a menu of its own (Zoom, Rows, Layers) and, at a phone's width, into one View menu; nothing is removed. In the Zoom menu the sliders become steps: Wider days, Narrower days, Taller rows, Shorter rows.

> **Tip** Expand / Collapse all quickly opens or closes every phase.

View Presets

The toolbar's three per-project preset slots save the way you've set the board up (zoom, density, layers, filters). **Shift**+click a slot to save (or overwrite) the current view into it; a plain click loads it. Keep one preset for the weekly status meeting and another for your own deep-dive, and switch between them without re-fiddling the toolbar.

Export & Present

Export the canvas as a PNG image (the camera button; choose a light, dark, or auto theme): the picture holds the whole project with the full names column, whatever the window shows. Or use the export hub for an editable PowerPoint board deck (pulse, timeline, milestones and risks as native slides) and a styled Excel workbook. The deck and workbook are built from this Overview model and honor the active date-range and include-completed scope.

Filtering

The filter panel is the same global filter the Gantt uses, so a filter set there carries over here; tasks that do not match are greyed out rather than hidden (a chip indicates active filters). Vertical and horizontal scroll happen inside the canvas, so the scrollbar stays put while you pan.

To give the chart more of the window, hide the app bars: View › Hide app bars, or Ctrl+Shift+Space. The Overview has no full-screen button of its own; Present covers the window only while its deck is open.

What's on this screen

Control	What it does
Health score & Pulse (Pro)	The card strip up top: an explainable A-F health ring plus progress, finish date, next milestone, overdue, and critical path. Click the ring for the factor cards that explain the score.
Time travel (Pro)	Drag the amber playhead (or press play) to rewind the whole board to any saved checkpoint or baseline; click Today to return to the live plan.
Presentation mode (Pro)	Launch a full-screen, scene-by-scene walkthrough of the board built from live data. Advance with the arrow keys or Space, exit with Esc.
Command palette (⌘K) (Pro)	Press Ctrl/Cmd+K to jump to any phase or milestone, toggle layers, start presenting, or filter to overdue, all from the keyboard.
Story panel (Pro)	Opens and closes the Story panel: what changed, the next 14 days and the milestone trends. Beside the chart in a wide window, over its right side in a short one.
Filter panel (Pro)	The same filters as the Gantt (they are shared): non-matching tasks grey out here instead of hiding.
Row structure (Pro)	Collapse all or Expand all phases, stack the leaf tasks, or merge every row into one band for the big picture.
Zoom & density (Pro)	Widen or narrow the time scale and tighten or loosen the rows; Reset row density puts the spacing back.

Part VI — Intelligence & Data

18. The AI Assistant (Pro)

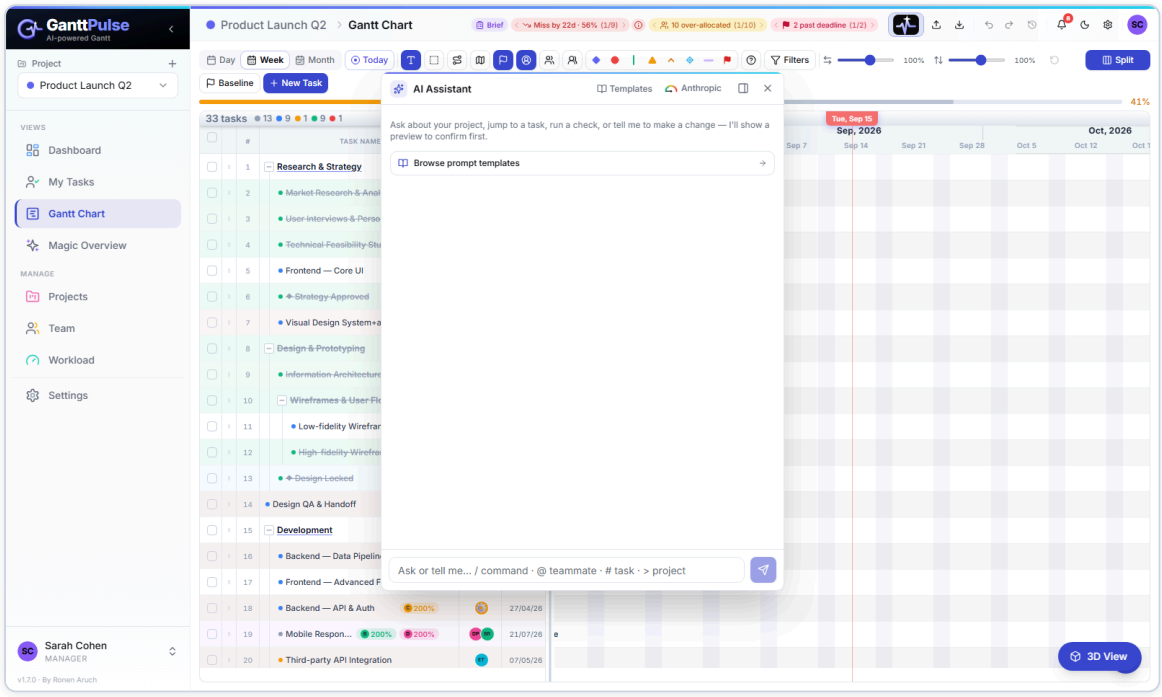


Figure 16 — The AI Assistant panel — ask, command, or browse prompt templates.

Chat in plain language to find, explain, plan, and change your project. Every edit is previewed and confirmed before it happens, and stays undoable (adding a team member is the one exception).

Opening the assistant

Click the pulse-spark icon in the app header (left of Import/Export) to open the assistant as a movable, resizable window you can dock to the right. It is a Pro feature: on the free tier the button shows a Pro ring and opens an upgrade prompt; if you are on Pro but the assistant is turned off, the button stays but is dimmed: a manager is told to turn it on in Settings → AI, and everyone else to ask their manager to set it up. The assistant sees only a small, read-only snapshot of the screen you are on (counts, a sample of task names/numbers, the selected task, your team and project names), never your whole database.

The exact words you meet when it is off:

- The button's tooltip: "AI Assistant (turned off; turn it on in Settings → AI)" for a manager, "AI Assistant (turned off; ask your manager to set it up)" for everyone else, and "AI Assistant (Pro)" on the free plan.
- Clicking it: the notice "AI assistant is turned off" with "Turn it on in Settings → AI." or "Ask your manager to set it up in Settings → AI."
- From the server, when a request still gets through: "AI assistant is not enabled. A manager can turn it on in Settings → AI.", "The AI assistant is not set up yet. A manager can set it up in Settings → AI." (no provider or model chosen) or "No API key is saved for this provider. A manager can add one in Settings → AI."

Viewers: ask, never apply

> **Note** For viewers (read-only accounts).

The assistant is open to you as a viewer. Asking, finding, explaining, reports and the brief all work. Anything that would change data still shows its confirm card, and every Confirm answers "Viewers have read-only access. Ask a manager to apply changes." Nothing is written.

How to ask

Type what you want in everyday language: "what's overdue?", "move task 30 to next week", "who is overloaded?", "assign 12-15 to Alice". The assistant grounds answers on the open project: refer to a task by the # number you see in the Gantt or by name, to people by name, and to a range as "48-50". Say "this task" to act on the selected row. It keeps recent turns for context, so follow-ups like "and outdent it" work.

> **Tip** It never invents dates or permissions. When you don't give a date it uses the working-day calendar, and it checks your role before suggesting an action.

> **Tip** Chain several changes in one message, like "add task X, assign it to Bob and make it high priority". Every step is previewed on ONE confirm card and undone as one.

Making changes (confirm-first)

Anything that writes data (create, edit, reschedule, assign, delete, move/indent, add or change dependencies, fix conflicts, post a comment, edit the project, add a team member) is a PROPOSAL, never an instant change. The assistant shows a preview card with exactly what will happen; nothing is written until you click Confirm, and the applied change rides the normal undo stack (Ctrl+Z), with two exceptions: adding a team member cannot be undone, and when a create proposal first adds unknown assignees to the team (login edition), undoing it removes the tasks but leaves those members. Read-only actions (find, filter, navigate, explain, reports, export) just run.

> **Tip** Member vs manager rules still apply: a member can't assign others or add team members, and the assistant refuses actions your role can't take: a viewer can ask anything, but every Confirm answers "Viewers have read-only access".

> **Tip** Deleting a parent deletes its subtree. The confirm card spells that out before you commit.

Find, filter & explain

Ask it to find and reveal a task, apply a filter (overdue, over-allocated, conflicted, unscheduled, unassigned, mine, blocked, milestones, hide-done, or by status/priority/assignee), jump to another page or project, or toggle Critical Path Mode. It can also explain a situation in words: "explain task #12" walks through its predecessors, conflicts, overrun, and allocation; "why is everyone overloaded?" explains the peak % and the tasks causing it; "what slipped vs baseline?" summarizes behind/ahead counts and the biggest working-day slips.

Reports & the weekly brief

Ask for a Health Check or a Status Report (computed KPIs plus a narrative), or run the Project Brief: "what should I worry about this week?". The brief is deterministic-first: the risks, slips, and overloads come from the same engines the badges use (never invented); the AI only phrases and ranks them. There's also a Brief button in the Gantt toolbar. Both the chat and that button are only there while the assistant is turned on; with it off, the Dashboard's This Week's Brief card still lists the findings.

The status report and the brief count on the team's own calendar: a task's duration and the "due soon" window are working days of the team's week with its holidays, judged from your calendar day, so a Monday-to-Friday team and a Sunday-to-Thursday team get different numbers for the same dates.

Time Machine: what changed?

Ask "what changed since Monday?", "what happened in the last two weeks?", or "catch me up on this project". The app reconstructs the project from its daily history checkpoints and tells you the EXACT story: which tasks slipped and by how many days, what was added, removed, or completed, which milestones were hit, and what's newly overdue, each change with a jump-to-the-Gantt icon. The change list is math from the history engine (never guessed); the AI only narrates it. It lives in the chat, so it needs the assistant turned on. Questions about the BASELINE ("what slipped vs the plan?") are answered by baseline variance instead.

> **Tip** A brand-new project has no history yet. The first daily checkpoint is captured automatically, so ask again tomorrow.

Instant commands (no AI round-trip)

For managers, unambiguous commands are recognized locally and run instantly, without calling the AI model at all, so they cost nothing against the AI usage limits and work even when the provider is slow: undo/redo, show or hide the critical path, go to a page, focus #N, delete #N (or a range), export, complete or start #N, and split #N into subtasks. Members and viewers always go through the model, so for them every message counts against the limits. Mutations among them still show the same confirm card as everything else.

Resolve over-allocation

When someone is over capacity, ask the assistant to level the work. "Suggest leveling" returns concrete, pre-validated fixes (move a task, lower a work-%, or reassign), worst window first. Each is advice you then confirm. For a bigger overload it can build a multi-move "Fix it" plan you review and apply in one go; cross-project plans offer a per-project "Fix here". You can also launch this from the "Level this overload with AI" button inside the over-allocation breakdown popover on the Gantt.

Draft & generate

The assistant can write for you: break one task into AI-drafted subtasks (funnelled into a normal confirm-first create), draft or improve a task's description or notes (a confirm-first edit), suggest a priority or duration, or open the Project Plan generator pre-filled from your prompt. Drafting actions still preview before anything is saved.

The plan generator opens as the **AI Project Plan Generator** panel over the Gantt (there is no toolbar button for it; the chat opens it). Describe what you want to build and press **Generate Plan**; the draft comes back as phases you can expand, with a count of phases and tasks. **Regenerate** starts over, **Import to Gantt** creates the phases as summary tasks with their tasks and links underneath. A failed import rolls back and adds nothing.

AI buttons in the task form

The task window has its own AI helpers, each a small button next to the field it fills. They appear while the assistant is turned on; on the free plan an **AI** pill takes their place and opens the upgrade dialog.

- **AI Description Assist** next to the description, with Generate description, Improve description and Shorten description
- **AI Duration Estimate** next to the duration
- **AI Priority Suggestion** next to the priority
- **AI Notes Assist** next to the notes
- **AI: Break into Subtasks**, which drafts subtasks with durations you can untick or adjust before they are created

Each shows its result before anything is applied, and you can still edit the field afterwards.

Next to an assignee in the assignee pickers, a warning such as "At 130% across 2 projects in this window." means that person is already over capacity across every project of the team during this task's dates. It is advice only and never blocks the assignment.

Prompt templates (guided fill)

Open the template library from the assistant header (or type / in the composer) for ready-made prompts across Tasks, Scheduling, People, Insights, Navigation, and Help. Picking one drops it into the composer with each blank marked ‹like this› and steps you through them in place: a task blank opens the # task list, a person blank the @ roster, a choice blank the ! options. Free-text blanks are just selected for typing over, and Tab jumps to the next blank. Nothing is auto-sent; you review and press Enter. Star a template to pin it as a favorite.

@ / # / > mentions

While typing, @ mentions a teammate, # references a task, and > scopes the chat to another project. Each opens an autocomplete you pick from. The same @ and # mentions work in task comments and notes; mentioning a person in a comment notifies them.

Key	Opens	What it inserts
@	the team roster	the person's name
#	the task list of the project in scope	the task's # number
>	your projects	In "": in front of what follows, so a # after it lists that project's tasks
/	your starred prompt templates	the template, with its blanks to fill
!	the choices of a template blank	the option you pick

Ask how the app works

The assistant doubles as a guide. Ask "how do I outdent a task?" and it answers from this verified help, not a guess. Ask "why is X greyed out?" and it grounds the reason in your live license tier and role. You can also ask it to start a page tour, run an export ("export to PDF"), or undo the last change, all without leaving the chat.

Provider, model & usage

> **Note** Managers only.

Managers configure the assistant in Settings → AI: choose the provider and model first (the Enable AI assistant switch stays off until you have, with the hint Choose a provider below first.), add an API key where the provider needs one (Ollama runs locally and needs none), then turn it on. For managers the assistant header shows today's request count against the team's daily limit (Team Usage Today, used / limit requests, or Unlimited); click it for the breakdown and a quick provider or model switch, which changes the setting for the whole team and turns the assistant on if it was off.

The providers are Google Gemini, Groq, OpenRouter, OpenAI, Anthropic and Ollama (Local). Each card lists the steps to get a key from that provider. The key is saved encrypted for the team and shown back masked (the first four and last four characters, dots in between); the field is labelled "Your personal API key for the selected provider." but it serves the whole team. Ollama's card reads "No API key required. Make sure Ollama is running, then test the connection."

Chat routing model is a second model choice: it runs only the chat's intent routing on a faster model with its own rate limits, so answers are unaffected; leave it as "Same as main model" if unsure. A model whose free tier is too small for the chat's payload is marked "may not fit the chat's payload on free tiers".

Usage limits and offline providers

Two caps apply, and both count requests, not words:

- Per person: 20 AI requests an hour. Over it you get "AI generation limit reached for this hour. Please try again later." Managers' instant commands (undo, go to a page, delete #N, export) make no model call and do not count.
- Per team, per day, on the models that carry one: the Google Gemini free models allow 250 requests a day (100 on Gemini 3.1 Pro), counted for the whole team and reset at midnight UTC. Over it: "Daily limit reached (N requests). Resets at midnight UTC. Try a different model or wait until tomorrow." Groq, OpenRouter, OpenAI, Anthropic and Ollama have no daily cap here; the Team Usage Today counter then reads Unlimited.

When the provider cannot be reached the words say which side failed:

- "Couldn't reach . Check the internet connection."
- "The provider rejected the API key. A manager can check it in Settings → AI."
- Ollama: "Ollama is not reachable at http://localhost:11434. Is it running?" when the local server is down, and "Model "" not found in Ollama. Run "ollama pull " first" when the model was never pulled.

What is sent to the provider

Every AI action sends only what that action needs, and the chat sees the snapshot described above. The bigger payloads are:

- A Health Check, a Status Report or the brief sends the project's task list: name, status, priority, progress, dates, deadline and the assignees' names, capped at a few hundred lines.
- The task-form helpers send the task's name and description, the project's name and description, the parent task's name and the names of its sibling tasks.
- The Time Machine sends the computed change list, never the raw history.

Nothing is sent while the assistant is off. With Ollama (Local) the model runs on your own machine and nothing leaves it. API keys are stored encrypted per team and never shown in full again after you paste them.

19. The Claude Code Connector

Let Claude Code push a plan into a project and keep the chart live while it works: how to connect it from Settings, Claude's own file, what revokes a key, what Claude's projects are on the free plan, and how its workers, claims and notes appear in the app.

What the connector is

The Claude Code connector (ganttpulse-mcp) is a separate program you run next to Claude Code, Claude Desktop, Cursor or any other MCP client. When Claude plans a piece of work, the plan lands in GanttPulse as phases and tasks; as Claude works, tasks go in progress and complete with their real start and end times; the next session asks GanttPulse where things stand and continues. The Gantt updates live in your browser as it happens. Claude's tasks often take minutes: switch the Gantt to the Hours view (press 4) to see each one at its real times, and the Actual hours column for the time Claude really worked.

It talks to the app over the same API the browser uses, signed with a personal API token instead of a sign-in. It needs no AI key inside GanttPulse and never calls a model itself.

Setting it up takes three steps: install GanttPulse, install the GanttPulse for Claude Code extension from the VS Code Marketplace (it sets Claude Code up for GanttPulse and keeps that up to date), then sign in to Claude's file (claude.db), which the Project list on the sign-in screen offers, and click Connect Claude Code in Settings (the Claude Code tab, in the login editions). Nothing is typed into a terminal. On a company server, and in a development checkout, the connector's own login command makes the key instead (below).

> **Tip** Tokens are a free-plan feature. The plan's caps apply to the projects you make, through the connector too: a push that would take one of your projects past 15 tasks is refused like any other create. The projects Claude creates have no caps (see Claude's projects on the free plan), and Pro-only reads (the risk forecast, the history diff) stay Pro. A change you ask the chat for (a task's dates, length or description) is a paid plan's too.

Connecting Claude Code

In the login editions (the desktop app, or the browser edition on your PC) sign in to Claude's file (claude.db), open Settings > Claude Code and click **Connect Claude Code**. It asks how long the key should last (30 days, 90 by default, or 1 year) - no password: the key works on this PC only, and you are signed in already - makes the key and writes it where the connector reads it: %APPDATA%\GanttPulse\connector-tokens.json, one entry per project file, readable by you only, never in the discovery file. The tab then reads "Claude Code is connected to this file (key … abcd, expires)", or "as " when the file's key belongs to someone else.

- **Connect again** replaces the file's key: the earlier one is revoked first, so clicking twice never eats into the 10-key cap.
- **Disconnect** revokes the key and removes it from the file.
- Connect works only in claude.db. Another project file shows the Claude Code tab only while it still holds a key: its status and **Disconnect**, and a line saying where Connect works. A Connect sent from another file anyway answers "Connect Claude Code in Claude's file: sign in to Claude's file (claude.db) from the Project list, then connect there."
- A viewer sees the form turned off ("A viewer cannot have API tokens"); an account that signs in without a password can connect too.

Everywhere else a key is made by the connector's own login command (npx ganttpulse-mcp login; node dist/index.js login in a development checkout). It asks for your email or username and your password in the terminal, never in the chat, calls the app's token endpoint for you, and saves the key as GANTTPULSE_TOKEN in the connector's .env file. On a company server the app cannot write to your PC, so that is the way there.

What the endpoint (POST /api/auth/tokens) needs and does, whichever way it is called:

- A **label** of 1 to 40 characters (the button and the connector name it for you).
- An **expiry** of 30, 90 or 365 days; 90 is the default and there is no "never". An expired key answers "This API token has expired".
- Your **current password**, asked again on purpose so a stolen browser session cannot turn itself into a long-lived key. A wrong one answers "Current password is incorrect". Ten attempts an hour are allowed.
- The secret, a string starting gp_, is handed out **once**, at creation: shown in the terminal, or written to the key file by the button. The app keeps only a hash and the last four characters, so a lost key is replaced, not recovered.
- At most 10 keys can be active per person: "At most 10 API tokens can be active - revoke one first".

Who cannot have one: a viewer ("A viewer cannot have API tokens"), a contractor and the admin console account. In the no-login desktop edition the endpoint answers "This edition signs in without a password, so it needs no API token": the connector signs in there without one.

> **Tip** Your keys are listed by GET /api/auth/tokens (label, last four characters, created, expires, last used, revoked) and revoked by DELETE /api/auth/tokens/. The Claude Code tab shows and revokes the open file's connection; the rest are API calls.

Claude's own file: claude.db

All of Claude's work can live in one project file of its own, apart from your files: claude.db, beside workspace.db. While it holds no project, its first screen (the Gantt and the Dashboard) leads with Connect Claude Code - the same form as Settings > Claude Code - and then with what to ask Claude; with the app bars hidden it says how to reach Settings. It offers no project by hand: plans in this file come from Claude. In the login editions the Project list on the sign-in screen offers **Claude's file (claude.db)** (unless it is the file already open). Started from VS Code (the tab's Start GanttPulse button), the app opens Claude's file by itself, and makes it first when it is not there yet: its sign-in screen then asks for the file's first account. The first time, picking it shows Create project: choose a username and a password, or tick Sign in without passwords, and click Create project. The file is made with a 7-day working week (Claude works weekends too) and you are its manager. After that the same entry opens it, and you sign in with its own accounts. Connect Claude Code there: Connect works only in claude.db, and a key belongs to one file.

Inside claude.db each code folder Claude plans is one project, named like the folder. The connector knows which file is open (the app writes the open file's name into its discovery file), so a plan pushed with another file open is refused: "GanttPulse has "" open. Claude keeps its projects in claude.db.", and it tells you to sign in to Claude's file (claude.db) from the Project list.

On the free plan claude.db is allowed like the demo file: one more fixed file beside the default workspace, with no Pro key. You may still make one project by hand inside it on the free plan; that one is capped and editable like any hand-made project.

The Gantt in a VS Code tab

The extension's command GanttPulse: Open Gantt shows the chart in a VS Code tab, on the project of the folder you have open. When the file open in GanttPulse has a key for Claude Code, the tab opens signed in: the extension asks the app for a one-time ticket, which takes that key and a program running under your own Windows account, and lasts one minute. Nothing is typed.

- A file with no key shows the sign-in page in the tab.
- The tab signs in as the person the file's key belongs to. On a Windows account two people share, that can be the other person: the account menu shows who.
- The tab is for the chart. Managing people (a name-only contractor is fine), the sign-in policy, your own email or username, the license and Share a copy answer "This needs your password: log out here, then sign in with your password."
- Opening a file where that account has a password asks for the password, and so do making a key and changing your password. Save As ends on the sign-in page.
- The tab's sign-in lasts as long as its key. Disconnect or Connect again on your own key, a manager's revoke or a new password sign the tab out at its next step. Save As copies the key, so in the copy the tab can stay signed in until the key is ended there too.

More room in the tab

The VS Code tab starts with the app bars hidden: no sidebar, no header, no title bar, no status line under the Gantt toolbar, and the toolbar on one line (in a narrow tab its widest groups give way; the timescale, Today, Filters, the pane button and New Task always stay). The thin strip across the top of the tab shows the bars again with one click; Ctrl+Shift+Space does the same, and so does View > Hide app bars from the Ctrl+K palette. The choice belongs to that tab: your main GanttPulse window keeps its bars.

> **Tip** The header's zoom (once the bars are shown) still works in the tab and combines with hidden bars for the most chart.

Claude's projects on the free plan

A project Claude creates through the connector is marked as Claude's: the portfolio shows it with 🤖. On every plan it has no caps: any number of projects, tasks and links, and it never takes your one project slot. Every timescale is open in it on every plan too: Day, Week, Month and Hours (press 4 to watch Claude's real working times). In return, on the free plan people only watch Claude's projects. The page then looks as it does to a viewer: the edit controls are hidden or turned off (no New Task, no add row, no bulk bar, no link handles, the baselines menu off, the palette's New Task gone), bars do not drag, and the task window reads "View only. Claude's project is view-only on the free plan". The lock is named once, in the toolbar where New Task would be: the notice "Claude's project · view-only on the free plan", which opens the upgrade dialog for Edit Claude's Projects. In the portfolio the project's Actions menu hides Rename, Edit, Archive and Delete and offers one item, Edit Claude's project..., that opens the same dialog; the rename pencil on its card is gone. Settings > License lists the rule: Claude's projects, "No limits; view-only on the free plan". A change that reaches the server anyway is refused with "Claude's project is view-only on the free plan. Upgrade to change it, by hand or by asking Claude".

What is walled: tasks and their dates, status and progress, links, reordering, bulk edits, baselines, the project's name and archive state, deleting it, and merging a member's copy into it. What stays open: reading everything, comments on its tasks, and status notes on the project.

What the free plan gives: the chart follows Claude's own work by itself. Claude's plans arrive with their own dates and lengths, and its tasks start, finish, fill up and count their hours as it works. A change you ask the chat for is a paid plan's. Asked to change a task's dates, length or description, Claude's key is refused with "On the Free plan the Gantt follows Claude's own work by itself. Changing a task's dates, length or description by asking the chat needs GanttPulse Pro. Nothing was changed.", and asked to make a project, Claude says it keeps its work in its own project for the folder. Every paid plan, Starter included, lets you change Claude's projects, by hand or by asking Claude.

The rule follows the project, not who is asking:

- Your own hand-made projects keep their caps and stay editable by hand. A push into one of them through the connector stops at 15 tasks, and the chat's rule above holds there too.
- Copying Claude's project (clone, save as template) makes a hand-made, capped copy: on the free plan a copy with more than 15 tasks is refused.
- A Pro key that lapses to the free plan makes Claude's projects view-only; nothing is lost.

> **Tip** Claude's own tracking keeps working on the free plan: its plans, starts, finishes, percent and hours are never refused.

Viewers and the connector

> **Note** For viewers (read-only accounts).

A viewer gets no API token: Connect Claude Code is turned off, creating one by any route answers "A viewer cannot have API tokens", and a key made before an account became a viewer stops working at that moment. The connector therefore needs a member's or a manager's account.

A key belongs to one project file

In the desktop login edition every project file is its own database, and a key is made inside one of them. Presented while another file is open, it answers "This API token was made in another GanttPulse file or server". Connect Claude Code makes the key in Claude's file, claude.db, the one file it works in. The key file keeps one entry per file (a key a file got before stays until you Disconnect it there), and the connector picks the one for the file that is open. On a company server there is one database, so one key serves everything.

Two copies behave differently on purpose:

- Save As… copies the whole file, keys included, so a key keeps working in the Save-As copy (the same project under a new name).
- Share a copy of this file… strips every key from the member's copy, so your key never travels with it.

The connector finds the desktop app by itself: the app writes %APPDATA%\GanttPulse\connector.json at every start (the address, the edition, an id and the name of the open file, never credentials), and the connector reads it, checks the app answers, and refuses to send a key made for another file. The keys themselves live next to it in connector-tokens.json. GANTTPULSE_DISCOVERY points both sides at a different discovery file, and the keys then sit beside it; GANTTPULSE_TOKEN_FILE names the key file outright. For a server, the connector is given the address in GANTTPULSE_URL instead, and GANTTPULSE_TOKEN holds the key.

What revokes a key

A revoked key answers "This API token was revoked" and the connector stops at once. Keys are revoked:

- by you, with Disconnect in the Claude Code tab, or through DELETE /api/auth/tokens/;
- by a manager of your team, who can list the team's active keys with the owner's name (GET /api/users/tokens) and revoke any of them (DELETE /api/users/tokens/);
- all at once when your password changes: your own change under Profile, a reset or invite link you redeem, a password a manager sets for you in the login edition, or an admin-console reset;
- all at once when your role becomes viewer.

A revoked key leaves connector-tokens.json at the next status read or app start; a stale entry is harmless, because the connector gets the refusal and says to click Connect again. Deactivating an account needs no revoke: every request checks the account is active first. Changing your password is the quickest way to cut every session off at once.

> **Tip** A key never lets the connector manage keys: creating, listing and revoking are sign-in-only routes, so a leaked key cannot mint another.

How a session's changes are labelled

Each Claude Code session carries a label, A, B, C and so on (or the one you set in GANTTPULSE_SESSION). Every change a session makes is audited as you, with the label: the audit row reads ", via Claude Code · A". A request made with a key but outside the connector reads "via API token · " (or just "via API token" when the label is not short plain text).

The label also appears in task notes. A blocker or a release appends a dated line the app writes itself, never overwriting what was there: "[· Claude Code · A] Blocked: " or "[· Claude Code · A] Released: ". The same line is not appended twice in a row, so a retried call leaves one note. When a note line would take the task's notes past their limit, the whole call is refused and nothing is written.

Workers on the Team page: claim, release, blocker

The first time a session claims a task, the app creates a worker for it: a row named **Claude · A** (the session label), with a 🤖 avatar, no login and no seat. The Team page lists these rows in their own section, **Claude's workers**, which starts closed. A worker is offered as an assignee only while it holds an open task. A worker that is on no task is removed 14 days after it was made, and deleting a worker keeps its name on the tasks it finished. It belongs to your account and your session label, so your "A" and a teammate's "A" are two workers; when a teammate's worker already has that name, yours is called "Claude · A ()".

What the four work-queue calls do in the app:

- **next**: the ready tasks, most urgent first (critical path, then float, then priority, start date and name). Ready means a task with no subtasks, Not Started, not held by a predecessor (a finish-to-start link waits for Completed, a start-to-start for started; a waiting phase holds its tasks), not claimed by another worker, and not assigned only to other people.
- **claim**: puts the session's worker on the task and sets it In Progress, stamping the real start the first time. A task another worker holds answers "Claude · B is working on "" since ."; a completed or cancelled task, and a phase, are refused. Unassigning the worker in the app ends the claim.
- **release**: takes the worker off; the task goes back to Not Started, or On Hold when work was done, with the reason as a note.
- **blocker**: sets the task On Hold, keeps the claim, adds the "Blocked:" note, and sends the project's active managers and the task's owner one in-app notification titled "Blocked: " (the caller is never notified; a repeated blocker sends no second notice). A blocker of the kind "waiting" says the task waits on something else instead: the same hold, a "Waiting on:" note, a soft mark, and no notification.

A member's key can claim and release only tasks that member owns or is assigned to; a manager's, any task of the team. A manager who deactivates a worker on the Team page stops its sessions: they answer "Claude · A was turned off by a manager." A completed task keeps its worker as the record of who did it.

Claude's marks on the chart

While Claude works, its tasks carry a mark on the bar and in the task list. Each chat's worker is named after the chat's session (what Claude Code calls it; /rename in the chat changes it), so two chats read as two names. When a session starts on a task, or the Gantt opens with a session already on one, the chart brings that task onto the screen and selects it; the Today button goes there too, and round the other working tasks.

- **Working now**: a ring around the bar in that session's colour, and a dot in the list. It goes by itself when the session stops reporting.
- **Waiting for you**: a yellow badge with a person, and a pale yellow band across the row, when the chat stopped for you.

- **Blocked**: a red badge on a task on hold, with the reason on hover.
- **Waiting on**: an indigo badge with an hourglass on a task on hold that waits on something else, such as another chat's work, a build or a person, with what it waits on on hover. A soft mark: nothing is wrong, and no one is notified.
- **Not answered**: an orange badge with a question mark, and a pale orange band across the row, when a chat ended while it still waited for your answer. It stays, however long, until that chat comes back, another session takes the task, or the task is closed; hover to read the question.
- **Stopped, not finished**: a grey badge with pause bars, when the session ended or went silent for three minutes and the task is still in progress. In the Hours view its bar ends where the session was last seen.

A bar shows one badge, the most urgent. A folded group shows the most urgent mark of the tasks under it. The strip above the task list counts each mark, and a click selects the next task that has it. Hover a marked bar to read it in words, with the chat it came from (its title, and in the VS Code tab where that chat is now: in this window, another window, a terminal, or when it ended). In the VS Code tab a mark also takes you to its chat: click its badge, or the small chat bubble on a working task's ring, or right-click the bar and choose Go to chat, or select the task and press G. In a browser or the desktop window there is no such button: open the chat in VS Code. The Markers button in the filter row shows only the tasks with a ticked mark, hides or shows each kind of mark, and lights the kinds on the chart now. Marks show only on Claude's tasks, on every plan, and they send no notification or e-mail.

> **Tip** The timer icon in the Gantt toolbar, or View > Show > Hours and tokens, adds what a task cost after its name, like 1.4 h · 620 K (under an hour in minutes, like 12 min, and under a minute in seconds). View > Show > Start and end time adds when the task really started and ended, on your clock: 16:19 → 23:09 on one day, with the dates across days, and 16:19 → while it is still open; with both on they read as one text, the times first. Each is off until you turn it on, and they show with the task names: hide the names and they hide too.

Task references (externalRef)

The connector names every task it pushes with its own reference, stored on the task as cc: (phases cc:phase:). That is how a repeated push finds the same tasks instead of duplicating them, and why an existing task keeps its dates, notes and description across pushes: once a task exists, the schedule is yours.

A reference is unique per project. A second task with the same one is refused: "Another task in this project already has the externalRef """, and a batch using one reference twice is refused before its first write. Copies start without references (a cloned project, a file import, a template, paste and duplicate), while undoing a delete keeps the task's reference.

Rate limits and what a key may call

One key may make 120 requests a minute; the answer carries RateLimit headers the connector paces itself from, and several sessions sharing a key share that budget. Making keys is limited to 10 attempts an hour per person, and an address that keeps presenting bad keys is slowed down.

A key reaches only what the connector needs: reading projects, tasks, settings, the license and the team; creating projects (a project a key creates is Claude's: uncapped, and view-only for people on the free plan), tasks and links; renaming a project Claude made (its name and nothing else of it); updating a task, its progress, status and dates; and the work queue (next, claim, release, blocker). Everything else, among it deleting, exports and imports, team and settings changes, merges, bulk edits and key management, answers "An API token cannot call this route". Your role still applies on top: a member's key cannot create a project.

20. AI Usage (Pro)

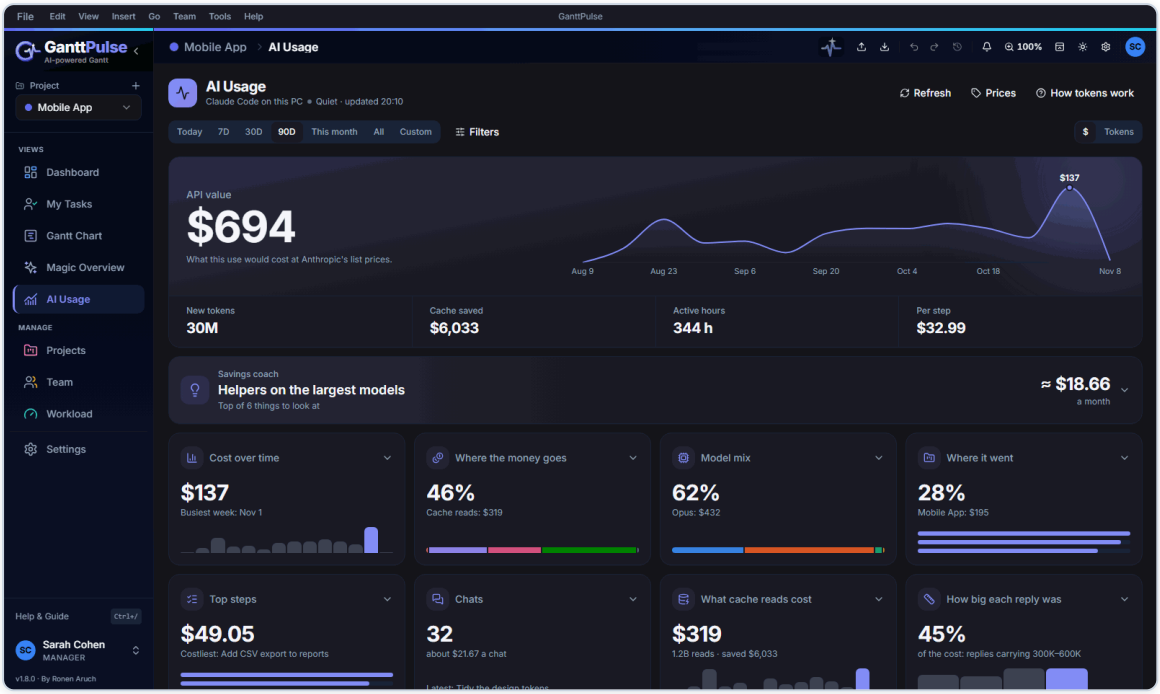


Figure 17 — The AI Usage page — tokens and what they are worth, on invented data.

See how Claude Code uses tokens and what that use is worth, from your own numbers, and learn where to spend less. The page exists only in Claude's own file, claude.db, for its managers. On Free and Starter it shows a preview and the way to Pro.

Cards That Open

> **Note** Managers only.

The page leads with the total, its trend and the savings coach's top finding. Below them, each card shows one number and a small picture: the busiest week, where most of the money went, the costliest task. Click a card to open its chart and details under it, and click it again or its X to close it. Open all cards at the bottom opens every one. The page remembers which cards you left open.

Where the Numbers Come From

The GanttPulse extension for VS Code reads Claude Code's logs on this PC and sends the numbers into claude.db. The page only reads that file, so opening it costs no tokens, and the app never looks at Claude's files itself. Until something has arrived the page says so, with the way to Settings > Claude Code. The first time, the extension also sends the history still on disk, and a progress card shows how far along it is while the dashboard fills in.

> **Tip** What arrives is numbers and labels, such as model and tool names, chat titles and folder names: never your messages or Claude's replies.

> **Tip** The numbers stay in claude.db. A shared copy of the file leaves them out.

The Filter Row

> **Note** Managers only.

One row above everything, and every card reads the same slice, so the numbers always agree. Choose the period (Today, 7D, 30D, 90D, This month, All or Custom). Filters opens the rest: Projects, Models, Who (the main chat, subagents or workflows) and the work switch. The button shows how many of them are in use, so nothing narrows the numbers out of sight. The $ and Tokens switch turns the whole page between dollars and tokens. Days are your own calendar days, and the page remembers your choices.

The Total and Its Tiles

> **Note** Managers only.

The big number is the API value: what this use would cost at Anthropic's list prices. It is not your bill, which depends on your plan. The line beside it is its trend over the period, with the peak marked. Under it: new tokens (input, cache writes and output, the tokens that are really new), cache saved (what the cache reads would have cost as fresh input, minus what they cost), active hours and the cost per task. Each number compares with the same number of days just before, with an arrow as well as a color.

> **Tip** Add your plan's price in Prices and the total also says how much API value the plan buys.

> **Tip** With nothing to compare with, as on All, the tiles show no change at all.

Use Over Time

> **Note** Managers only.

The columns show use per day, week or month, chosen from the length of the period, split by token type or by model. In tokens, cache reads get a chart of their own, because they would flatten everything else. In dollars they sit in the same stack, since they fit. Long periods scroll sideways on a phone.

Model Mix and Where the Money Goes

> **Note** Managers only.

Model mix splits the use by model family and lists each model, costliest first. Where the money goes splits the API value by token type, and says in one sentence why the biggest part is big. A model the price list doesn't know is counted but marked no price, and left out of the dollars.

How Big Each Reply Was

> **Note** Managers only.

Every reply sends the whole chat again, so a reply's size is how much context it carried. The columns count replies by that size, with the costliest size in color, and a sentence gives its share of the replies and of the cost. A small share of very large replies is often a large share of the money.

Where It Went

> **Note** Managers only.

A ranked list you can split by Project, Folder, Agent, Effort or Speed. A reply belongs to the project of the task it worked on, else to the project linked to its chat's folder, else to No project. A project of another team is counted but never named. The rows always add up to the total, with Claude Code's background calls in a row of their own where they have no agent, effort or speed.

The Savings Coach

> **Note** Managers only.

Thirteen fixed rules read the period's replies and say where tokens went and what to change: a chat carried into the next task of the plan, very long chats, a cache written again after a break or a model change, heavy thinking, and more. Each finding gives a month's amount, why, and what to do, largest first. It uses no AI, so it costs no tokens.

> **Tip** The rules overlap, so their amounts don't add up to a total.

> **Tip** A ≈ means the amount rests on an assumption, such as another model's price.

> **Tip** Snooze puts a rule away for 30 days. Dismiss puts it away until you bring it back.

> **Tip** It reads at most the last 90 days of a longer period.

Top Tasks

> **Note** Managers only.

What each Gantt task cost, costliest first, with its project, status, hours, new tokens, cache reads and API value. A task's work comes from two places. Since the connector began marking replies, each reply knows its task, and those numbers are exact. Earlier work comes from the Work lines in the task's notes: those are rounded, so the cost shows with a ≈. A line the rows already hold is not counted again.

> **Tip** The All work, With a Gantt task and No task switch in the filter row works on marked replies only, so every card still adds up. Work from before the marking shows here in Top tasks, not in that switch.

> **Tip** Claude's count holds all the work and a task's work is part of it, so never add the two together.

> **Tip** Hours are the task's Actual Hours, all time. They don't change with the period.

Chats

> **Note** Managers only.

Every chat in the period: its folder, models, replies, new tokens, cache reads, the largest context it reached, and its API value. The newest come first. Click any column to sort by it, and click it again to turn it around: the whole period is sorted, not only the page you see. To keep titles off the screen, turn on Hide chat titles in Prices; the Chat column then doesn't sort.

Tables and CSV

> **Note** Managers only.

Each chart has a button that shows its numbers as a table, in full rather than rounded, and a button that saves them as a CSV for a spreadsheet. Click any column of a table to sort by it, and click it again to turn it around. The Chats CSV holds the page of the table you are on.

Prices

> **Note** Managers only.

Prices opens the list the page uses, in dollars per million tokens, with where each price came from. It is read-only here. Costs are worked out from it each time the page reads, so a new price reprices the past too. The extension keeps the list up to date; until its first delivery the page uses the list built into the app. Your own prices and discounts move Your price, never the API value.

How Tokens Work

> **Note** Managers only.

Five short lessons with your own numbers for the period: the four kinds of token and their prices, why every reply re-reads the chat, why long chats cost more, what subagents and workflows add, and what effort, thinking, fast mode and model choice change.

What the Numbers Rest On

> **Note** Managers only.

The line at the bottom says how many logs and replies the page has, how far back they go, the extension's version and its last delivery, and any lines it couldn't read. Background calls are the ones Claude Code makes for itself and counts only as a total. They are part of the API value, so it matches Claude Code's own figure, and web searches are among them. The dot at the top says Live while deliveries are arriving and Quiet when they aren't; Refresh only reads the file again.

What's on this screen

Control	What it does

Filter row (Pro) (managers)	The period and dollars or tokens; Filters opens projects, models, who, and work with or without a Gantt task. Every card reads this one slice, so the numbers agree.
Total and tiles (Pro) (managers)	The API value or new tokens and its trend, with new tokens, cache saved, active hours and the cost per task, each against the days just before.
Use over time (Pro) (managers)	Columns per day, week or month, split by token type or by model.
Model mix (Pro) (managers)	Which models the use went to, split by family and listed by model.
Cache reads (Pro) (managers)	Cache reads on their own chart, because they would flatten the others.
Where the money goes (Pro) (managers)	The API value by token type, and why the biggest part is big.
How big each reply was (Pro) (managers)	Replies by how much context they carried, with the costliest size in color.
Where it went (Pro) (managers)	A ranked list by project, folder, agent, effort or speed. The rows add up to the total.
Savings coach (Pro) (managers)	Fixed rules over your own numbers that say where tokens went and what to change. No AI, so no tokens.
Top tasks (Pro) (managers)	What each Gantt task cost, costliest first, from its marked replies and its notes.
Chats (Pro) (managers)	Every chat in the period. Click any column to sort by it, both ways.
Prices (Pro) (managers)	The price list the page uses, read-only, and the setting that hides chat titles.
How tokens work (Pro) (managers)	Five short lessons with your own numbers.
What the numbers rest on (Pro) (managers)	How many logs and replies there are, how far back they go, and the last delivery.

21. Importing, Exporting & Sharing Files

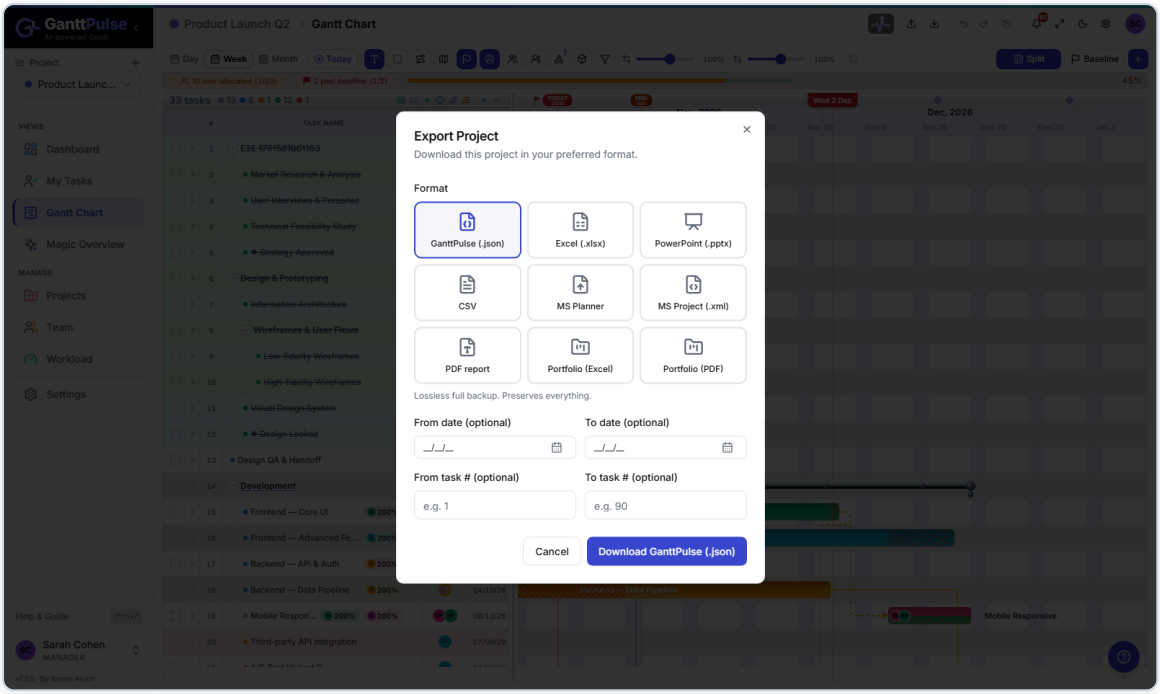


Figure 18 — The Export dialog — choose format and scope.

Export & Import

Move project data in and out: a lossless native backup, spreadsheets, MS Project / Planner interop, a designed PDF, and an editable PowerPoint deck.

Where it lives (Pro)

Export & Import are Pro features. The icons sit in the app header (left of Undo) and under File ▸ Export / Import, available from every page. On a plan without export (the Free and Starter plans) they show a Pro ring and open an upgrade prompt. Export is available to everyone; Import is manager-only, since it bulk-writes tasks and can create projects and add people.

How to Export

Open Export, pick a format, and optionally scope what's included. For GanttPulse JSON, CSV, MS Planner, MS Project and the PDF report you can set a date range and/or a task-number range (From task # / To task #). Excel and PowerPoint use the Date range presets and an Include completed tasks switch instead, and the two Portfolio formats offer only Include archived projects. The file downloads immediately. The formats are listed in this order: GanttPulse (.json), Excel (.xlsx), PowerPoint (.pptx), CSV, MS Planner, MS Project (.xml), PDF report, Portfolio (Excel) and Portfolio (PDF). The two Portfolio tiles are offered to every role, not only managers.

> **Tip** The PNG picture of the Magic Overview is not an export format: it is the camera button on the Overview page itself, saved as *MagicOverview*.png.

GanttPulse JSON (.json): lossless backup

The native format and the fullest export of the plan itself: the project, its calendar, the people, the tasks (hierarchy, dates, assignees and per-assignee work-%) and the dependencies with lag. It does not carry baselines, comments or history, and on import the team's own calendar is kept when the file's differs, so re-importing a .json restores the plan, not every record around it. Use this to archive a project or move it between instances with the least loss.

Excel (.xlsx): combined workbook

Downloads a .xlsx workbook combining several sheets: the task tree (with colored status cells and outline-level indentation), a flat task list, a dependencies sheet, the Overview canvas, and a summary (task counts by status, average progress, milestone count). Use the column options panel to choose which fields are included.

The options for Excel are a **Date range** preset (Project, This quarter or Custom with its own Start and End), a **Paper size** (A3, A4 or Letter), the **Include completed tasks** switch, and the **Columns** list, where you untick what the sheet should leave out: # (WBS), Task name, Assignees, Start date, End date, Duration, Progress, Status, Priority and Depends on. PowerPoint shares the date range and the completed-tasks switch only.

PowerPoint (.pptx): editable board deck

An editable slide deck built from the Magic Overview: native, editable PowerPoint shapes and tables, not screenshots. The deck runs: Pulse (the KPI numbers), the Status Brief, the Timeline (paginated on long projects, with dependency arrows drawn between phases; past 12 phase-level links the slide keeps the bars and leaves the arrows out), Milestones, and Risks. It honors the active date-range and include-completed scope. Use it to hand stakeholders a deck they can keep editing.

Previous Decks: Compare Exports Over Time

When PowerPoint is selected, a "Previous decks" panel lists the past deck exports of this project, whoever on the team made them. Each snapshot keeps the export date, % complete, forecast finish, and health grade (just the figures, no files are stored). The panel calls out what moved since the last deck (e.g. "finish moved +14 days"), so every new deck opens with an honest "what changed since the last status meeting" story.

PDF report

A designed document with a vector Gantt chart, a KPI summary, and a task table (with dependency connections; Hebrew is supported). Choose which sections to include, the page size, and the orientation. The baseline variance report (Excel or PDF) is not in this dialog: a manager generates it from the Gantt's Baseline menu, under Generate report, against the active baseline.

The PDF options are:

- **Include sections**: Gantt chart, Summary cards and Task table. The last ticked section cannot be unticked, so a PDF is never empty
- **Page size**: A4 or A3; **Orientation**: Landscape or Portrait
- **Draw dependency connections in the chart** and **Show start/end dates beside each bar**, both greyed out while the Gantt chart section is off

CSV, MS Project XML & MS Planner

Interop formats for other tools:

- CSV: standard columns that drop into any spreadsheet and re-import here (drops lag and per-assignee %). The columns are ID, WBS, Name, Start, Finish, Duration, % Complete, Predecessors (as task number plus link type, for example 12FS), Resources, Milestone, Priority, Notes and Description.
- MS Project (.xml): Microsoft Project XML (MSPDI); carries hierarchy, dependencies and lag, allocation %, deadlines and the team calendar (drops colors; status is derived from progress), and round-trips back in via Import.
- MS Planner: a CSV formatted for Microsoft Planner (drops colors and actual dates).

Lag in MS Project is not the same number as the gap here. MS Project measures a lag between working moments (the end of one day to the start of the next), GanttPulse between days, so a finish-to-start link with a gap of 0 is written as an MS Project lag of -1 day and read back the same way; a start-to-finish link runs the other way (+1); start-to-start and finish-to-finish lags are carried unchanged. The link type and the real dates are the same on both sides.

What the downloaded file is called

Every export is named after the project and the day it was made. The day is your own calendar day (the app sends it with the request), not the server's, so an export made late in the evening carries the date you see on your clock. Letters of any script are kept in the name; spaces become dashes.

Format	File name
GanttPulse (.json)	-GanttPulse-.ganttpulse.json
MS Project (.xml)	-GanttPulse-.xml
PDF report	-GanttPulse-.pdf
CSV	-.csv
MS Planner	-planner-.csv
Excel (.xlsx)	-overview-.xlsx
PowerPoint (.pptx)	-overview-.pptx

Import (manager-only)

Import accepts .json (native), .csv, .xlsx, and MS Project XML as .xml or .mspdi. A binary .mpp cannot be read: pick one and the dialog tells you to use File > Save As in MS Project, choose XML Format, and import that file instead. CSV and Excel are foreign sheets, so they show a column-mapping step (auto-guessed from the headers; at least the task-name column is required); JSON and MS Project XML are structured and need no mapping, and a Microsoft Planner CSV is detected automatically.

Three import modes:

- New project: the file becomes a fresh project
- Update current: rows are matched to existing tasks BY NAME. Matches refresh their fields, new rows are added (great for round-tripping a sheet you sent out for edits)
- Merge into current: everything in the file is appended alongside what's there

A dry-run preview runs automatically before you commit: task/dependency/milestone counts, an update-vs-add split, and any warnings.

> **Tip** After every successful mapped import the column mapping is saved in this browser (the most recent 30 are kept), so the next import of a sheet with the same headers starts with the mapping pre-filled.

> **Tip** Circular or otherwise invalid dependencies are skipped on import rather than failing the whole file.

> **Tip** On an empty workspace the welcome screen's Import a project button opens the same dialog; a first import can only create a new project, so the mode picker is not shown there.

Import limits, the preview, and what is skipped

> **Note** Managers only.

A file is refused before anything is read into the project when it is over 8 MB, when a CSV or Excel sheet has more than 5,000 rows, or when any format holds more than 10,000 tasks or 50,000 dependencies.

Press **Preview import (no changes yet)** and the dry run reports what the commit would do. Its warnings are spelled out:

- "N assignee(s) have no matching team member and will be skipped."
- "The file calendar differs from this team; the team calendar will be kept."
- "N milestone(s) have subtasks; they will be imported as summary tasks."

Update current matches rows to existing tasks by name: the name is trimmed and compared case-insensitively, and when the project holds several tasks with the same name the file's rows are paired with them in order, top to bottom. Choosing Update current or Merge into current shows "Updating or merging changes this project and can't be undone; it also clears the undo history." An archived project refuses both of those modes ("Project is archived. Restore it to make changes"); importing as a new project still works.

After the commit the completion message counts what was left out rather than failing the file: "N circular dependencies skipped", "N ancestor dependencies skipped", "N invalid parent links skipped (those tasks are at the top level)" and "N assignees unmatched". An import that would take the project past the plan's task cap (15 tasks on the free plan) is rolled back as a whole and the Plan Limit Reached dialog names the cap.

Add imported people to the team

When a new-project import has assignees that don't match anyone on the team, you can add them in one step: tick who to include. They're created as CONTRACTORS (plannable, name-only people with no login and no license seat), so an imported plan never eats your seats; convert anyone to a full member later from the Team page. Manager-only, new-project imports only, and not available in the single-user desktop edition.

Sharing & Offline Collaboration

Hand a copy of your whole workspace to a teammate to edit offline, then merge their changes back across all projects (desktop login edition).

Where the File menu is

The File menu in this topic is the one in the app's own window title bar at the very top of the desktop editions, to the left of Edit and View. It appears once you are signed in.

It is not the same list as the File menu you can switch on for the header in Settings > Appearance. That one holds only "New Project…", "Export…" and "Import…". The file actions "Open project file…", "Save As…", "Share a copy of this file…", "Merge returned copy…" and "Recent files" act on a project file on your disk, so they exist only in the title bar of the desktop editions.

> **Tip** No title bar at the top of the window means you are not on a desktop edition, and these file actions are not available there.

Save As: your own copy

File → Save As makes a full, independent copy of the current project file and switches you to working in the new file. Use it to fork a project or keep a copy. It is a one-way copy: there is no link back to the original and no way to merge changes between them. To collaborate with a teammate and get their edits back, use "Share a copy of this file" instead. On the free plan Save As carries a Pro chip and opens the More Project Files upgrade dialog; to keep a backup there, copy the .db file itself while GanttPulse is not running.

Share a copy of this file

> **Note** Managers only.

File → Share a copy of this file lets one teammate edit your projects offline. Pick the member and a destination file. The app records a merge base for every active project (each tagged with that member) and writes a consistent copy of the whole workspace to that file. Your live data is untouched. The copy is theirs to open and edit, signed in as themselves with their own role's permissions.

> **Tip** The recipient must already be on the team (add them on the Team page first), be able to sign in, be active, and not be a viewer: a viewer cannot edit, so there would be nothing to merge back. They sign in to the copy with their own account.

> **Tip** Unlike Save As, a shared copy records the bases needed to merge their edits back later.

> **Tip** Re-sharing to the same member replaces the previous copy's bases. The newest copy you hand out is the one you merge back.

Who can receive a copy, and what the dialog says

> **Note** Managers only.

The dialog is titled **Share a copy of this file with a member** and warns: "Files are not encrypted, so share only with people you trust." It lists only the people who can open and edit a copy. With nobody eligible it reads "No one else here can sign in and edit a copy. Add a member on the Team page first." If a refused person is picked anyway, the server answers with the reason:

- " cannot sign in, so they could not open the copy. Choose someone with a login." (a contractor or a deactivated account)
- " is a viewer and cannot edit, so there would be nothing to merge back. Choose a member or manager."

The copy is the whole file except your sign-ins to other services: the saved email sign-in (user and password), the AI provider keys and any API tokens made in your file (the Claude Code connector's keys) are left out. In the member's copy email is not set up, the AI assistant has no key, and a key from your file does not work.

Send the copy to the member

> **Note** Managers only.

Sharing only SAVES the copy to the location you picked. The app does not email or transmit it. Deliver that file to the member yourself: email, USB, or a shared folder. After they edit it offline and send it back, you bring their changes in with "Merge returned copy".

Merge the returned copy

> **Note** Managers only.

When the member sends the edited file back, use File → Merge returned copy. Pick their returned file and the member you shared with. You get a field-by-field preview grouped by project (matched by task), split into auto-apply, conflicts, and review. Tick what to accept and apply. On commit the server re-derives the duration of every task whose dates it wrote and rolls up the summary dates; it does not reschedule successors, so check dependent tasks afterwards. A role check sorts the changes rather than dropping any: edits that member could have made in the app go to auto-apply, and edits to tasks or fields they could not have changed go to review, under "Your call: tick to take the returned value", where you decide.

> **Tip** Pick the SAME member you shared the copy with. The merge compares against the latest copy you handed them, across every project.

> **Tip** Conflicts are where both you and the member changed the same field since the share. You choose which value wins.

What a merge can answer

> **Note** Managers only.

When the merge runs you get one of three notices: **Merge applied** (everything you ticked went in), **Merge applied with issues** (it went in, and the notice lists what was skipped or kept), or **Merge failed** (nothing merged, and the dialog stays open with the reason). A merge the server refused outright, before anything was written, shows **Merge failed. Nothing was changed** with the server's message.

The refusals and the things a merge leaves alone:

- An older copy: "This is an older copy. You shared a newer copy with on , and only the newest copy can be merged back. Ask to send that one."
- A project archived since the share: " is archived and was left out of this merge. To merge this member's changes to it, restore it from Projects → Show archived and compare again."
- The plan's task cap is judged for every project before the first write; a breach refuses the whole merge and the Plan Limit Reached dialog names the cap (15 tasks per project on the free plan).
- A returned link that the in-app rules forbid is skipped with its reason: "would create a cycle", "would create a loop through a summary" or "would link a summary with its own subtask".
- Deletions are never automatic. A task the member deleted is offered in the preview for you to tick, and even a ticked one is kept when it still has subtasks in your file: " was not deleted; it has subtasks in the master."

Save As vs Share: which to use

Both produce a copy the recipient can open and edit the same way (they must already have an account in the file). The difference is the round trip: Save As is a one-way fork: fine for a backup or handing someone a copy to use on their own, but there is no merge-back. Share a copy of this file records a merge base for every project, so when

the file comes back you can merge their offline edits into all of them. Choose Share whenever you want their changes back.

22. Notifications

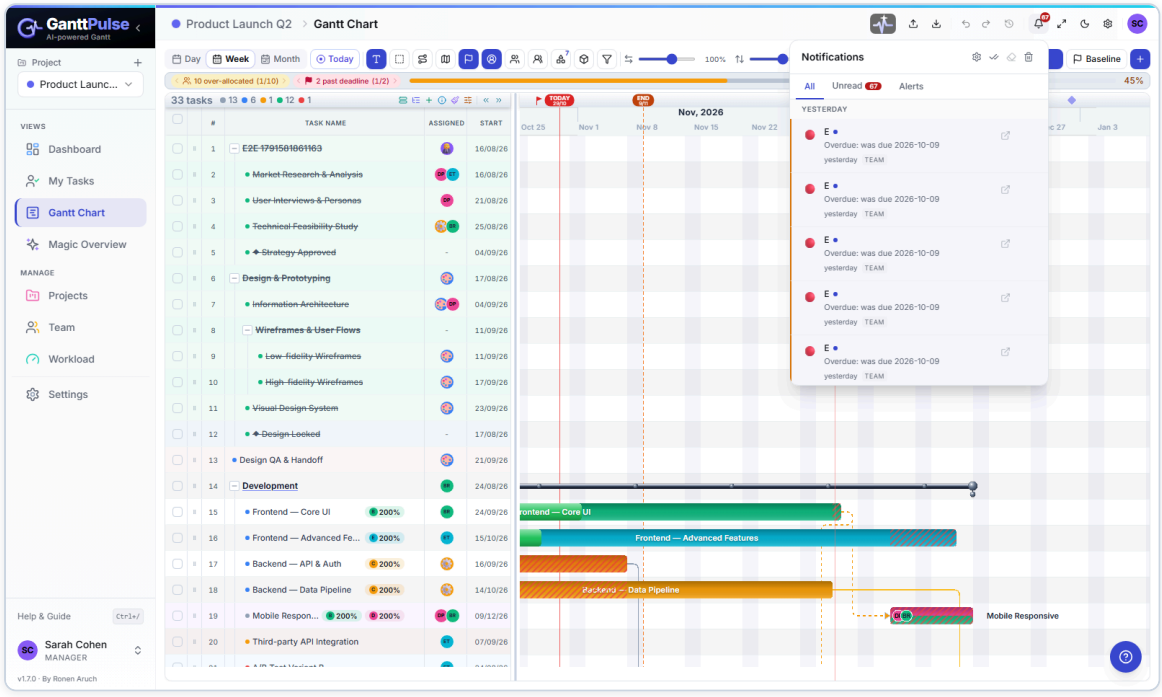


Figure 19 — The notification bell and feed.

The in-app notification feed keeps you informed about your work and the tasks you own, delivered live and stored so you see them on any device.

The Notification Bell

The bell in the app header opens your notification feed. A red badge shows the unread count. The popup groups notifications by day (Today / Yesterday / date) and has 'All', 'Unread' and 'Alerts' tabs. Notifications are stored on the server, so you see them on any device, even when email isn't configured. The feed keeps your most recent 100 notifications at a time - that is a display limit, not a retention rule. Nothing is deleted for 90 days after you read it, and unread items are kept for 365 days.

What You're Notified About

Notifications about YOUR work:

- Assigned: a task was assigned to you
- Reassigned: a deleted teammate's owned tasks were handed to you
- Updated: a task you're assigned to changed
- Due soon / Due today: your task is approaching its end date
- Deadline overrun: a task you own or are assigned to has slipped past its promised deadline (distinct from schedule-overdue)
- Completed: a task you're assigned to was finished (if you opted in)
- Comment / @mention: someone commented on, or mentioned you in, a task
- Project archived / restored / deleted: a project holding tasks you own or are assigned to was archived (your tasks are paused), restored, or deleted

Manager-oversight notifications about tasks you OWN:

- Someone else completed, blocked, or edited your task
- A task you own went overdue, or is assigned but not started near its due date

Which Notifications Email You

Every notification lands in the in-app feed. Only a few also go out by email, and only when a manager has configured Settings > Email Server, your account has an email address, and your 'Email delivery' switch is on:

Event	Feed	Email
Assigned to a task	yes	yes
A task you are assigned to was updated	yes	yes
Completed, due soon, deadline overrun, comments, @mentions, oversight, project archived or deleted, reassigned	yes	no
A manager reset your password, or added you to the team	-	yes (a link, or a welcome)
Monday Brief (managers)	-	yes

A username-only account with no email simply gets no email; the feed still has everything.

Due-Soon & Overdue Reminders

A scheduled scan runs every 6 hours. It raises 'Due soon' for your tasks that end within the next 3 days, 'Due today' on the day, and the overdue and stalled pings about tasks you own. Each reminder fires once per task and person: a reminder you cleared stays cleared, and the scan never recreates it. Mute the due-soon ones with the Due-soon reminders toggle in Settings > Notifications.

The Monday Brief Email

> **Note** Managers only.

On Mondays, managers get one email with a brief per project they run, judged by the team's work week and holidays. It is sent at most once per manager per week, and only when all of these hold:

- The plan includes the AI assistant (Pro or Enterprise)
- Settings > Email Server is configured and your account has an email address
- Your 'Oversight on tasks I own' and 'Email delivery' switches are both on
- You are on a server edition: the desktop and browser editions never send it

The assistant can show the same brief on demand on any day.

Reading, Opening & Clearing

Click a notification row to open the task it's about (it switches project if needed). Use the header buttons in the popup to manage the feed: Mark all read, Clear read (remove read ones), or Clear all. Hover a single notification to reveal its dismiss (×) button. Clearing is permanent.

> **Tip** Cleared reminders stay cleared. They won't reappear on a refresh.

> **Tip** Reading a notification clears it from the unread count but keeps it in the feed until you dismiss it.

Notification Preferences

Tune what you receive in Settings > Notifications (also reachable from the gear in the bell popup). Per-user toggles: Assignment changes, Task updated, Task completed, New comment, Due-soon reminders, and 'Oversight on tasks I own', plus an 'Email delivery' switch that turns notification emails off while keeping the in-app feed. @mentions always reach you. Turn Oversight off to mute completed/blocked/edited/overdue pings about tasks you own when you're a busy owner.

23. Real-Time Collaboration & Undo

All changes sync instantly across team members. No refresh needed.

How It Works

When any team member creates, updates, or deletes a task, all other users viewing the same project see the change instantly. This uses WebSocket connections for real-time communication. No manual refresh is needed. The Gantt chart, task list, and all views update automatically.

What Syncs in Real-Time

All task operations sync automatically:

- Task creation, editing, and deletion
- Status and progress changes
- Dependency additions and removals
- Task reordering and hierarchy changes
- Batch operations (bulk updates, imports)

Your own changes appear instantly. Changes from other team members appear within seconds. Your own edits are applied locally first, and their echo from the server is ignored for a few seconds, so nothing flickers.

When Two People Edit the Same Task

There is no locking and no merge dialog: each save writes the fields it changed, and the last save wins. Both screens then show the saved value. If you and a teammate are reshaping the same part of a plan, agree who drives, or watch the activity toasts and the task's history.

Dropped Connections

If the live connection drops (sleep, a network blip, a server restart), the app reconnects on its own and refetches the open project, so the board never stays stale on what it missed. An edit made while the server cannot be reached is rolled back with an error; redo it once you are back.

Undo, Redo & the History Panel

Ctrl+**Z** undoes your last action and **Ctrl**+**Y** (or **Ctrl**+**Shift**+**Z**) redoes it; the header's undo and redo buttons name the action they would reverse. Inside a text field the keys keep their native meaning. The stack holds your last 100 actions for the open project in this browser session. It is cleared when you switch project, when you import into the existing project (Update or Merge), when you restore a baseline, and on reload; a teammate's changes are never in it.

The History button in the header opens the panel: your actions newest first, a 'You are here' marker, and 'Click any step to jump there'. A jump of more than 5 steps asks 'Jump to this point?' first, because every step is a real write to the server. If a step fails on the way, the jump stops there and an 'Undo failed' (or 'Redo failed') toast carries the server's reason. Viewers have no undo: they change nothing.

Activity Notifications

When a teammate makes a change, a toast notification appears showing who did what. These activity toasts can be customized in Settings > Notifications:

- Toggle activity toasts on/off
- Adjust how long notifications stay visible

Your own actions do not trigger these notifications.

Email Notifications

The system sends email notifications when:

- You are assigned to a task
- A task assigned to you is updated
- Your password is reset by a manager
- You are added to a team
- It is Monday and you are a manager with the Monday Brief conditions met (see Notifications)

Comments, mentions, due-soon reminders and completions stay in the in-app feed only. Email delivery is configured by the team manager in Settings > Email Server, and your own 'Email delivery' switch in Settings > Notifications can turn it off for you.

Optimistic Updates

Changes you make appear in your UI immediately (optimistic update) before the server confirms. If the server rejects the change or a conflict occurs, the UI automatically reverts to the correct state. This keeps the app feeling fast while ensuring data consistency.

Part VII — Configuration & Administration

24. Settings

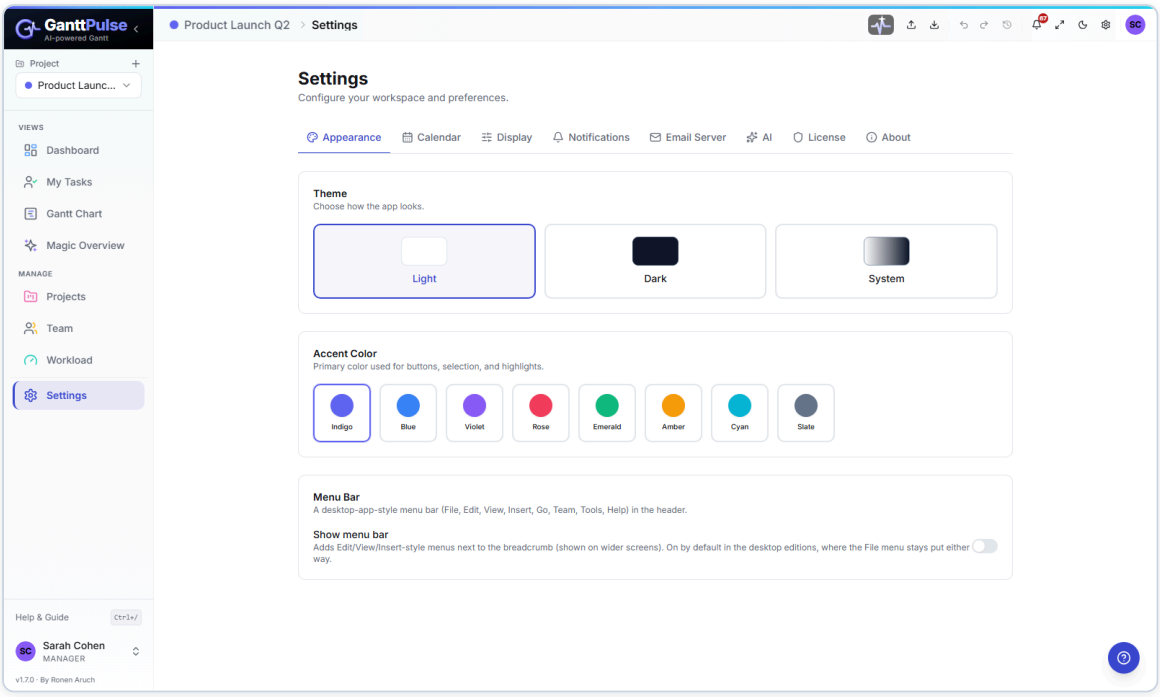


Figure 20 — The Settings page.

Customize the app's appearance, calendar, Gantt display, scheduling behavior, notifications, and email for your team.

Appearance

Choose your theme: Light, Dark, or System (follows your OS preference). Pick an accent color from 8 options: Indigo, Blue, Violet, Rose, Emerald, Amber, Cyan, or Slate. The accent color tints buttons, links, active states, and highlights throughout the app.

> **Tip** Use the quick toggle in the header to switch between Light and Dark. For System mode, go to Settings > Appearance.

Calendar

Configure how dates and time work across the app:

- Date format (your own): Auto (browser language), MM/DD/YY, DD/MM/YY, YYYY-MM-DD, or DD MMM YY
- Working days (team-wide, manager only): which days of the week count for duration
- Holidays (team-wide, manager only): specific non-working dates, and whether they stretch task durations
- Week starts on (your own): Sunday, Monday, or Saturday

Date format and week start are YOUR OWN preferences and affect nobody else. Working days and holidays are team-wide, manager-only, and affect Gantt rendering, duration calculations, and all date displays.

Saving. Working days and holidays are staged until you click Save. Switching tabs, leaving the page by any route (sidebar, menu bar, Ctrl+K, back) or reloading asks 'Discard unsaved changes?' first. Saving a new work week reprices the duration of every task in the team's projects.

Holidays. Pick a country and click the Load button (labelled with the current and next year) to stage that country's public holidays; the toast says 'Press Save Holidays to apply', and custom entries you already had are kept. Add your own holiday with a date and a name. Each holiday has a 'counts as a working day' toggle for a date you want listed but not excluded from durations.

> **Tip** Non-work days are shaded on the Gantt timeline when weekend shading is enabled in Display settings.

Menu bar (in the Appearance tab)

The Appearance tab ends with a Menu Bar section holding one switch, "Show menu bar". Turn it on to get File, Edit, View, Insert, Go, Team, Tools and Help menus beside the breadcrumb in the header. They run controls that already exist elsewhere in the app; nothing is exclusive to them.

- Off by default on the web (cloud, Docker, LAN); on by default in the installed editions, desktop and browser alike.
- Wider screens only. A phone-width layout hides the menus.
- Saved on this device rather than on your account, so it does not follow you to another machine.
- In the desktop editions the menus belong to the app's own window title bar, and this switch hides them there as well - except the File menu, which always stays.

> **Tip** Ctrl+K opens the same commands in a searchable list whether or not the menu bar is showing.

> **Tip** Tools > Settings in that menu jumps straight to any tab on this page.

Display

Control Gantt chart visuals:

- Task labels: on-bar, outside, or hidden
- Progress color: By Status, Subtle, By Progress, Custom (two colours: completed and remaining), By Assignee, or By Group (default: By Status); Faded remaining part (on by default) shows the part of a bar not done yet see-through, in every progress color
- Timeline elements: Dependency arrows, Weekend shading, Holiday shading, Today line, Deadline line, Task info on hover, Drag info panel, and Dependency highlights (coloured dots on the selected task's predecessors and successors)
- Dependency arrows: style (Orthogonal, Rounded, Curved, Straight), thickness (Thin, Normal, Bold), Color by type (FS, SS, FF, SF), Arrow animations, dependency tooltips, Highlight chain on hover, Show violation indicators with a style (Dashed + pulse, Dashed only, Color only), and lag-day labels on arrows

Scheduling (inside the Display tab)

Scheduling is a SECTION INSIDE the Display tab, not a tab of its own, and the whole section is a Pro feature. Control how dependencies affect task dates:

- Scheduling mode: Auto-cascade (always adjust dates), Ask every time (a dialog before moving), or Manual only (never auto-adjust)

- Maintain gap on move LEFT / Maintain gap on move RIGHT (hidden in Manual only): TWO separate switches with DIFFERENT defaults. Moving a predecessor EARLIER pulls its successors earlier with it (ON by default). Moving a predecessor LATER does NOT push them later unless you switch the right-hand one on (OFF by default)
- Cascade confirmation threshold (Auto-cascade only): minimum impacted tasks before showing confirmation
- Show cascade preview (hidden in Manual only): show a preview before applying cascading changes
- Conflict resolution when a new dependency creates a conflict: Show options (a dialog), Auto-fix (adjust the successor's dates), or Keep conflict (create the link and show it as violated)
- Default dependency type: FS, SS, FF, or SF
- Default gap (lag days): a TEAM-wide setting, the gap stamped on NEW connections (press Enter to commit). Changing it offers to apply the new gap to all existing connections in the current project in one click. Existing connections otherwise keep their own gap; moving tasks never rewrites it
- Completed as satisfied: treat completed tasks as satisfying their dependencies

> **Tip** Auto-cascade mode is recommended for most teams. It keeps dates consistent automatically.

> **Tip** Any role can change these. Only Default gap (lag days) is manager-only, because it is the one team-wide setting here.

Notifications

Two groups of settings:

- In-app toasts: Toast duration (a slider from 1 to 10 seconds, in half-second steps), Task & dependency toasts, and Team activity toasts
- What you're notified about (feed + email): Assignment changes (being assigned to a task AND being removed from one), Task updated, Task completed, New comment, Due-soon reminders, and 'Oversight on tasks I own' (mute completed/blocked/edited/overdue pings about tasks you own). @mentions always reach you. The 'Email delivery' switch ('Email me notifications') turns notification emails off while keeping the in-app feed

Email Server

> **Note** Managers only.

Configure SMTP settings for email notifications. Pick a provider preset (Microsoft 365, Gmail, Yahoo, Zoho, SendGrid, Mailgun, SES and more) to pre-fill the host and port, then add credentials and the sender address (From Address falls back to the username when empty). Gmail needs an App Password with 2-Step Verification turned on, not your normal password; the tab reminds you.

Testing. The Test button is available once a host and a username are filled in. It SAVES the form first and then sends a test email to you, so what you see is what gets tested. The status strip at the top reads Not configured, then 'Configured, not tested' once a host and username are saved, 'Connected. Test email sent' after a good test, or 'Connection failed:' with the reason. Every failure starts with 'SMTP test failed:' and names the thing to check:

Reason	What to check
authentication failed; check the username and password.	The credentials (Gmail: an App Password)
the mail server refused the connection; check the host and port.	Host and port, and whether a firewall blocks the port

the connection timed out; check the host and port.	Host and port; the server is unreachable from here
the mail server host could not be found; check the host.	A typo in the host name, or DNS
a TLS/socket error occurred; check the port and encryption settings.	The port and the encryption the provider expects
the message envelope was rejected; check the From/recipient address.	The From Address must be one this account may send as
could not send the test message; check the SMTP settings.	Any other refusal; recheck every field

> **Tip** Email notifications are sent when tasks are assigned, updated, or when team members are added or have their password reset.

License & Activation

The License tab shows your current plan (one of four tiers: Free, Starter, Pro, or Enterprise), its expiry, where the key came from (Loaded from environment variable, Uploaded via Settings with who did it and when, Loaded from licenses/ folder, or Loaded from license.key file; the desktop editions say 'Activated on this machine'), a lock icon when the key is bound to this hardware, and your plan's limits: projects, tasks per project, and Team seats (managers and members use a seat; viewers and contractors are free; Unlimited where your key says so).

To activate: paste your license key (it starts with GP-) into the Upload License Key box (or use Browse File… if you received it as a file), then click Activate License. The plan badge and limits update immediately. When several keys are present the environment variable (GANTTPULSE_LICENSE) is tried first, then the key uploaded in Settings, then a license file; a key that fails (expired, wrong hardware) falls through to the next.

A Hardware IDs section lists this machine's identifiers, which you may be asked for when a machine-locked key is issued.

Status banners:

- 'License expires in N days' during the last 30 days before expiry, and 'License expired on . Features reverted to free tier.' after it
- A paid key is one year of updates, and the card names its day 'Updates until': 'Your year of updates ends on ' during the last 30 days, then 'Updates ended on . This version keeps working on your plan.' A version made after that day runs as Free until the key is renewed
- Hardware change on a server edition: 'Hardware change detected. Pro features stay active until ' for a 72-hour grace period, after which the key runs as Free until a key for this machine (or a shareable site key) is activated. Desktop editions and a freshly uploaded key step down at once
- 'This license key has been revoked by the vendor.' when the key is on the signed revocation list that ships with the app and is re-read every hour
- An invalid key, and 'The application files failed their integrity check' when the installed files were altered; both run as Free

> **Tip** Pro-locked settings (the Email Server and AI tabs, and the Scheduling section of Display) stay clickable on the free plan. They show an in-tab preview and upgrade prompt instead of being disabled.

> **Tip** The tab strip scrolls sideways on a narrow screen, and the address bar's ?tab= opens a tab directly (a tab you may not use falls back to Appearance).

Claude Code (login editions)

In the login editions Settings has a Claude Code tab in Claude's own file, claude.db: it connects the Claude Code connector to that file without a terminal. To see it, sign in to Claude's file (claude.db) from the Project list on the sign-in screen.

- The status line reads 'Not connected', or 'Claude Code is connected to this file (key …abcd, expires)', or 'as ' when the file's key belongs to someone else.
- **Connect Claude Code** asks how long the key lasts (30 days, 90 by default, 1 year) - no password: the key works on this PC only - makes the key and writes it to %APPDATA%\GanttPulse\connector-tokens.json for the connector to read. **Connect again** replaces this file's key (the old one is revoked first); **Disconnect** revokes it and removes it from that file.
- Another project file has no Claude Code tab, unless it still holds a key: then the tab shows that key and **Disconnect** only, and says Connect works in Claude's file.
- A viewer sees the form turned off ('A viewer cannot have API tokens'); an account that signs in without a password can connect too.

On a company server the app cannot write to your PC, so the connector's own login command makes the key there. Everything else about keys, Claude's projects and the connector's sessions is in the Claude Code Connector guide.

> **Tip** The tab is free-plan too: claude.db is allowed like the demo, and the projects Claude makes have no caps. Editing them yourself needs a paid plan; comments stay open.

About

The About tab shows the app version, the edition you're running (Cloud, Desktop, or Local), and your plan badge, plus support actions (open Help, contact support, copy support/diagnostic info) and the license terms. Use it to confirm what build you're on when reporting an issue.

AI Assistant (Manager)

> **Note** Managers only.

Managers get an AI tab (between Email Server and License) to pick the provider and model, add an API key, and turn the assistant on. How the controls gate each other:

- The 'Enable AI assistant' switch stays disabled until both a provider and a model are chosen
- Keys are kept per provider: switch providers and each keeps its own saved key, shown masked once saved. Ollama needs no key
- Test needs a provider, a model and a key (typed or already saved); it sends one request and reports the result
- Clear key removes the saved key for the current provider and switches the assistant off ('API key removed. The AI assistant is now off.')

Once it is on and a key is saved for the chosen provider (Ollama needs none), anyone on a plan that includes the AI assistant (Pro or Enterprise, not Starter) can open it from the header.

What's on this screen

Control	What it does

Settings tabs	Appearance, Calendar, Display, Notifications, Email Server, License, About, and AI (Pro). The strip scrolls on narrow screens; the arrow keys move between tabs and the tab is kept in the address.
Working days (Calendar tab) (managers)	Team-wide: which days count for duration. Managers tick the days and click Save Working Days; leaving the page with unsaved changes asks first. Saving reprices every task's duration.
Default gap days (Display tab, Scheduling) (Pro) (managers)	Team-wide: the gap stamped on new connections, 0 to 365 days. Press Enter to commit; the app then offers to apply it to the connections this project already has.
Test (Email Server tab, Pro) (managers)	Available once a host and a username are filled in. It saves the form first, then emails you; the status strip reads Connected or names the failure to check.
Enable AI assistant (AI tab) (Pro) (managers)	Stays off until a provider and a model are chosen (and a key is saved, except for Ollama). Clear key switches it off again.
License key box	Paste the key that starts with GP- (or Browse File... for a key file), then Activate License. Limits and Pro controls update at once; the Hardware IDs below are what a machine-bound key needs.

25. Your Profile & Password

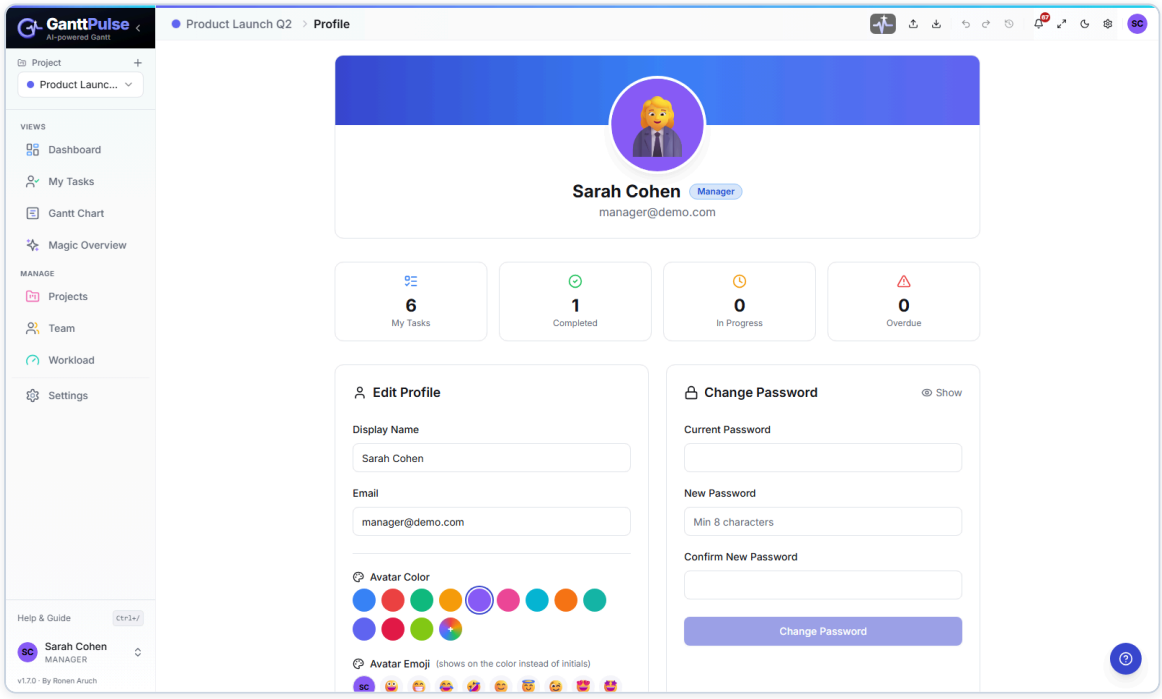


Figure 21 — The Profile page — identity, password, and appearance.

View and edit your personal profile, choose your avatar color, and manage your password.

Profile Overview

Your profile header shows your avatar, display name, your email (or your username when the account has no email), and role badge (Manager, Member, or Viewer). Below it are your personal stats: total tasks assigned, completed, in progress, and overdue.

Quick Edits from the Header Menu

You do not need this page for the two most common tweaks. Click your avatar in the app header to open the account menu: click your name there to edit it in place (**Enter** saves, **Esc** cancels), and pick an avatar colour from the swatches. Both save at once and show everywhere you appear.

Edit Profile

Change your display name and email in the profile section. Click Save Profile after making changes; it writes the name, the email (and the username where there is one) and the avatar colour and emoji chosen below in one go. Your display name appears throughout the app wherever you are assigned or mentioned: on task cards, the team page, Gantt assignee columns, and the sidebar.

In the desktop login edition there is also a Username field. You can sign in with either your username or your email, so a login account needs at least one of the two (email is optional there).

Your Time Off

Record your own vacations and absences in the Time Off section: add a From/To range with an optional note, or delete an entry to give the days back. During time off you count as zero-capacity: the Workload heatmap marks those days with a palm-tree, work scheduled onto them is flagged as an overload, and scheduling suggestions route around them.

Managers can also manage your time off from the Team page. Viewers see this section read-only: a viewer cannot record time off.

Avatar Color

Pick a color for your avatar from a palette of preset options. This color appears on your avatar circle across the app: in the sidebar header, team page, task assignments, Gantt bars, and comment threads. Choose a color that helps your team identify you at a glance.

Avatar Emoji

Instead of your initials, you can show an emoji on your avatar. Pick from the presets or paste any emoji (on Windows, Win + . opens the emoji picker). It appears everywhere your avatar does. Choose the initials swatch to turn the emoji back off.

Change Password

Update your password by entering your current password followed by the new one twice. A password must be 8 to 128 characters and contain an upper-case letter, a lower-case letter and a digit. (The desktop app, where the project file lives on your own machine, relaxes this to 4 characters with no complexity rule.)

You stay signed in after the change. It also revokes every personal API token, including a Claude Code connector token, so reconnect such tools afterwards. A password reset by a manager or the administrator does the same.

In a project that lets members sign in without passwords, the box reads Set a Password while you have none (there is no current password to enter), and a Sign in without a password box below it removes your password again after you confirm it, so you sign in by picking your name. Removing it ends your API tokens too; an account without a password cannot create new ones.

> **Tip** Forgot your current password? Ask your team Manager to reset it from the Team page.

Your Task Stats

The stats section shows a snapshot of your current workload: total tasks assigned to you, how many are completed, how many are in progress, and how many are overdue. This matches what others see on the Team page for your profile.

What's on this screen

Control	What it does
Save Profile	Commits your name, job title, email or username, and the avatar colour and emoji you picked above. Nothing changes until you click it.
Change Password	Current password, a new one that meets the rules shown, and a confirmation. Changing it signs out your other sessions and revokes every Claude Code connector key you made.
Sign in without a password	Shown in a project that lets members sign in without passwords while you still have one: confirm your current password to remove it and sign in by picking your name. It ends your API tokens too.
My time off	Whole days you are away. Each one is a zero-capacity day in the Workload heatmap, the Team bars and the Gantt chips. Viewers can read this list but not change it.

26. The Admin Panel

System administration: manage user accounts, view server health and activity, and check the license. Available to the system administrator.

User Management

The Users tab lists every account across all teams. Columns: User (name and email), Role (viewers get a muted badge), Groups (the user's teams, not the task Group tag), Tasks (owned / assigned), Joined, and Actions. Search the list and use Reset PW to recover access: you type the new password directly, and it must meet the strict policy (8 to 128 characters with an upper-case letter, a lower-case letter and a digit; the desktop login edition relaxes this to 4 characters). The user is not emailed, so hand the password over yourself; the reset also revokes the user's API tokens. (Adding or removing accounts, with the task handover a removal needs, and changing a Manager/Member role, is done on the Team page, not here.)

Server Info & License

The Server Info tab shows six runtime cards (Uptime, Node Version, Memory, Heap Used, Database Size, Connected Users), the platform, and the active license (tier and expiry). It also holds the log-retention setting (from one day to ten years, default 90 days): login history, audit logs and notification files older than that are deleted at server startup and when you click Clean Now. The Export button in the page header downloads the data of whichever tab is open, named after the tab and the date: login-history-.csv, server-info-.txt, active-sessions-.csv, notifications-.csv, users-.csv. Use it to confirm the deployment is healthy and licensed correctly.

Login History

Review recent login events for a security audit trail: who signed in, when, and from where. Columns: Time, Email, Status, IP, and Browser; the tab shows the latest 100 events, and older ones are deleted by the retention cleanup.

Active Sessions

The Active Sessions tab lists everyone currently connected over the live socket: user, email, when they connected, and which project they're in. Use it to see who is online right now.

Notifications

The Notifications tab is a delivery audit trail of the system notifications that were sent (e.g. task assigned / updated). Columns: Time, Type, Recipient, Task, Triggered By, and Details; the tab shows the latest 200 entries.

What's on this screen

Control	What it does
Export	Downloads the open tab (users, sessions, login history, the notification log or server info) as a file for support or audit.
Reset PW (Users tab)	Sets a new password for that account on the spot. The person is emailed when the server can send mail; otherwise hand them the password yourself.
Log Retention (Server Info tab)	How many days of login history, audit logs and notification files to keep, 1 to 3650. Older rows go on server startup and when you click Clean Now.

Part VIII — Reference

27. Keyboard Shortcuts

Every shortcut the app answers, grouped the way the Help panel's Keys tab lists them. Most stand down while you type in a field; Ctrl+K and Ctrl+/ work everywhere.

General

Keys	Action	Where
Ctrl + **Z**	Undo last action	Everywhere
Ctrl + **Y**	Redo last action	Everywhere
Ctrl + **Shift** + **Z**	Redo last action (alternative)	Everywhere
Ctrl + **/**	Open or close the help guide (works everywhere, even while typing in a field)	Everywhere
Ctrl + **K**	Open the command palette (on the Magic Overview it opens that page's own palette)	Everywhere
Ctrl + **Shift** + **Space**	Hide or show the app bars (sidebar, header, title bar) for a small window; the strip at the top shows them too	Everywhere
Esc	Close panel / Cancel	Everywhere
Ctrl + **=**	Zoom the app in, one step (as the browser's and VS Code's zoom; Ctrl and the numeric keypad's + work too)	Everywhere
Ctrl + **-**	Zoom the app out, one step	Everywhere
Ctrl + **0**	Actual size: the app back at 100 %	Everywhere

Gantt Chart

Keys	Action	Where
N	Open a blank task window (nothing is saved until you confirm). Not available to viewers	Gantt
1	Day view (Pro)	Gantt
2	Week view	Gantt
3	Month view (Pro)	Gantt
4	Hours view (Pro)	Gantt
G	Go to the selected task's Claude chat (in the VS Code tab)	Gantt

Gantt Navigation

Keys	Action	Where
↓ or **J**	Next task	Gantt

↑ or **K**	Previous task	Gantt
← or →	Nudge selected task 1 day earlier / later (a milestone moves as a point)	Gantt
Alt + ↑ + ↓	Move the selected task up / down among its siblings	Gantt
Enter	Edit task name inline	Gantt
Shift + **Enter**	Insert new task below	Gantt
Insert	Insert new task above	Gantt
Esc	Exit 3D view / close panel / deselect task or connection	Gantt
Tab	Indent (make child of the row above)	Gantt
Shift + **Tab**	Outdent (promote task)	Gantt
↑ or ↓	Inside a Days or % cell: change the value by 1	Gantt
Arrows	With the timeline focused: scroll one column / row. With the mini-map focused: nudge the viewport	Gantt

Task Operations

Keys	Action	Where
Ctrl + **C**	Copy selected task (with its subtasks)	Gantt
Ctrl + **X**	Cut selected task	Gantt
Ctrl + **V**	Paste task below the selected row	Gantt
Ctrl + **D**	Duplicate the selected task with its subtasks, right after it	Gantt
Ctrl + **A**	Select all tasks	Gantt
Del	Delete the selection after a confirmation (members: only the tasks you own are deleted). With a connection selected, Del or Backspace removes that connection instead	Gantt
Ctrl + **Enter**	Save the description popover / post a comment	Gantt

My Tasks

Keys	Action	Where
/	Focus search box	My Tasks
1	Switch to Cards view	My Tasks
2	Switch to List view	My Tasks
3	Switch to Board view	My Tasks
4	Switch to Calendar view	My Tasks
↓ or **J**	List view: next row	My Tasks

↑ or **K**	List view: previous row	My Tasks
Enter	List view: edit the row's name	My Tasks
Shift + **Enter**	List view: insert a task below	My Tasks
Insert	List view: insert a task below (same as Shift+Enter)	My Tasks
Tab	List view: indent (Shift+Tab outdents)	My Tasks
Ctrl + **A**	List view: select the whole group	My Tasks
Ctrl + **C**	List view: copy (Ctrl+X cuts, Ctrl+V pastes)	My Tasks
Esc	Close detail / Clear selection	My Tasks

28. When Something Goes Wrong

Every message the app can show, grouped by area, with where it appears, why, and what to do. In the app, paste the message into the Help panel's search box to open the same entry.

Permissions

"Access denied. Required role:"

Appears as: An amber Permission denied toast

Why: The action is manager-only: managing the team, importing, team-wide settings, baselines, templates, archiving or deleting a project.

What to do: Ask a manager to do it, or to make you one. Your role is shown on the Profile page.

"Viewers have read-only access"

Appears as: A Permission denied toast

Why: Your account is a Viewer. It sees every project its team has and changes nothing, apart from its own profile, password, time off and notification settings.

What to do: Ask a manager to convert you to a member. A member takes a seat on the plan.

"You can only edit tasks assigned to you"

Appears as: A Permission denied toast; a bar drag also shows Couldn't save change

Also reads: "You can only delete tasks you own"

Why: Members edit the tasks they own or are assigned to, and delete only their own. A drag on someone else's bar is refused by the server and the bar snaps back.

What to do: Ask the task's owner or a manager to assign you, or to make the change.

"You can only move a group you fully own"

Appears as: A Permission denied toast after a drop in the task list

Also reads: "You can only nest a task under a group, or under a task you can edit"

Why: A member moves a subtree only when every task in it is theirs, and nests a task only under a group or under a task they may edit.

What to do: Ask a manager to move it, or move only the tasks you own one at a time.

"Project is archived. Restore it to make changes"

Appears as: A Permission denied toast on any edit

Why: An archived project is read-only everywhere: the app, the API and the Claude Code connector. Its tasks also leave My Tasks.

What to do: A manager restores it: Projects page, Show archived, then Restore on the card.

"You can only manage dependencies on tasks assigned to you"

Appears as: A Permission denied toast when drawing or removing an arrow

Why: Members link or unlink only tasks they own or are assigned to.

What to do: Ask the owner or a manager to add or remove the link.

"You can only assign tasks to members of the project's team (viewers are read-only)"

Appears as: A Permission denied toast when saving a task

Why: Assignees must be members or contractors of the project's team. Viewers cannot be assigned, and people from another team are not offered.

What to do: Pick someone from the team list. A manager adds people on the Team page first.

Plan limits

"Plan Limit Reached"

Appears as: A dialog, or the raw message for API and connector callers

Also reads: "Plan limit reached: maximum"

Why: The free plan allows 1 project, 15 tasks per project and 3 seats. Archived projects and the demo count. A plan the AI drafted or a file you import is refused whole when it would cross the task cap; nothing partial stays.

What to do: Delete or archive what you no longer need, or activate a Pro key under Settings > License.

"Seat limit reached. Add them as a contractor or viewer, or upgrade for more seats."

> **Note** Managers only.

Appears as: A line in the Add Team Member dialog

Why: Managers and members take a seat on the plan. Viewers and contractors are seat-free.

What to do: Add the person as a contractor (a name to plan with, no login) or a viewer, or upgrade.

"Free plan allows only 1 level of subtasks. Upgrade for deeper nesting."

Appears as: The Multi-Level Subtasks dialog, or a Can't move here toast

Also reads: "Deeper nesting is a Pro feature"

Why: On the free plan a subtask cannot have subtasks of its own - except in Claude's file (claude.db), where every plan nests freely so Claude's plans show their phases and tasks.

What to do: Keep one level of subtasks, or upgrade; in Claude's file there is no limit.

"Free plan only supports Finish-to-Start (FS) dependencies. Upgrade for all types."

Appears as: The All Dependency Types dialog, or an Error toast

Why: Start-to-Start, Finish-to-Finish and Start-to-Finish links are Pro.

What to do: Use Finish-to-Start, or upgrade.

"Gap days between tasks need auto-scheduling. Upgrade to set dependency gaps."

Appears as: A Couldn't save gap toast, or the Auto-Scheduling dialog

Why: Gaps on connections belong to Auto-Scheduling. On the free plan a new link's gap is set to 0 whatever the default says.

What to do: Leave the gap at 0, or upgrade.

"This is a premium feature. Upgrade to GanttPulse Pro for full access."

Appears as: An Upgrade required toast, or the upgrade dialog

Why: The server refused a Pro route: export, import, the Dashboard, My Tasks, the AI assistant, the history panel, availability.

What to do: Activate a Pro key under Settings > License. On the free plan the page shows a preview instead.

"The free plan works in its default workspace. Opening, creating or copying other project files needs Pro."

Appears as: A toast on the sign-in screen, or the More Project Files dialog in the app

Also reads: "Open my workspace"

Why: Browser login edition: the free plan uses its default workspace file (the demo file opens too). Every other file carries a Pro chip in the File menu and the Project dropdown.

What to do: Click Open my workspace, or upgrade to work in several project files.

"Claude's project is view-only on the free plan"

Appears as: The orange View only tag in the toolbar, where New Task would be, and the Edit Claude's Projects upgrade dialog it opens (also from Edit Claude's project… in the portfolio's Actions menu); the task window's View only line; the message itself when a change reaches the server anyway

Why: The project was created by Claude Code through the connector. On the free plan such projects have no caps, and in return people only watch them: the edit controls are hidden or turned off as for a viewer, bars do not drag, and tasks, links, dates, the project's name and archive state, baselines and merges are refused by the server. Comments and status notes stay open; your own projects are not affected.

What to do: Upgrade: every paid plan (Starter, Pro) lets you change Claude's projects, by hand or by asking Claude. On the free plan they follow Claude's own work by themselves.

"On the Free plan the Gantt follows Claude's own work by itself"

Appears as: Claude's answer in the chat when you ask it to change a task's dates, length or description: the app refuses the change to Claude's key, and nothing is changed

Why: On the free plan the chart follows Claude's own work by itself: its plans arrive with their dates and lengths, and its tasks start, finish and fill up as it works. A change a person asks the chat for is a paid plan's. With Claude's key, a task's planned start or end may move earlier or onto a day up to today, never to a later day ahead, and a description that is not empty is not replaced.

What to do: Upgrade: every paid plan (Starter, Pro) lets Claude change a task when you ask. On a hand-made project of your own you can make the change yourself.

Dates, moves and dependencies

"Couldn't save change"

Appears as: A red toast after a bar drag, a resize, a nudge or an inline date edit

Also reads: "Your change was reverted. Please try again."

Why: The server refused the change or did not answer in time: the task is someone else's, the date fell on a non-working day, the project is archived, or the connection dropped. The bar snaps back and nothing is recorded in undo.

What to do: Retry once. If it repeats, check who owns the task and that the project is not archived. The History panel shows what did save.

"Cascade failed"

Appears as: A red toast after a move that pulled successors along

Also reads: "Task moved but cascade changes could not be saved."

Why: Your task moved, but one of the successors the cascade wanted to move was refused (not yours, or a limit), so the chain moved only in part.

What to do: Press Ctrl+Z to put the move back, or ask a manager to reschedule the successors.

"Schedule conflict remains"

Appears as: A warning in the bell after a move

Why: After the move a dependency still points the wrong way, so the arrow shows red and dashed. Keep dates, show as conflict in the conflict dialog leaves it like this on purpose.

What to do: Move the successor, click the arrow to change the link, or use the Conflicted quick filter to list them all.

"Dependency created without auto-fix"

Appears as: A warning in the bell after drawing an arrow

Why: The link was made, but the tasks the schedule fix would move belong to someone else, so they stayed where they were.

What to do: Ask a manager to reschedule them, or move your own task to satisfy the link.

"Circular dependency detected"

Appears as: A red toast when drawing an arrow or moving a task

Also reads: "would create a loop"

Why: The link would make the chain return to its start, directly or through a summary and its subtasks.

What to do: Remove one link in the chain named in the message, then draw the new one.

"Dependency already exists"

Appears as: A red toast when drawing an arrow

Why: Those two tasks are already linked in that direction.

What to do: Click the existing arrow to change its type or gap instead.

"Not a working day"

Appears as: A toast when typing a date in a cell or the task window

Also reads: "is not a working day. Choose a working day."

Why: The date falls on a day the team calendar excludes: a weekend day or a holiday.

What to do: Pick a working day. A manager changes the work week and holidays under Settings > Calendar.

"Can't move here"

Appears as: A red toast after a drop in the task list

Also reads: "Cannot move a task under its own descendant", "Maximum nesting depth of"

Why: The drop would put a task under its own descendant, deeper than 8 levels, under a milestone, or next to a dependency that would then cross into its own summary.

What to do: Drop it somewhere else. When the message names a dependency, remove that link first.

Sign-in and account

"Invalid email or password"

Appears as: A red line on the sign-in page

Why: Unknown identifier or wrong password. The same line also covers three other cases: a contractor (a name-only person who cannot sign in), an account with neither email nor username, and a wrong password on a deactivated account.

What to do: Check the email or username. After five misses in a row the account locks for 15 minutes. There is no self-service reset: a manager sends a reset link from the Team page.

"Account temporarily locked after repeated failed logins. Please try again later."

Appears as: A red line on the sign-in page

Why: Five wrong passwords in a row lock the account for 15 minutes, before the password is even checked.

What to do: Wait 15 minutes, then sign in. A reset link from a manager also opens the account.

"Too many login attempts, please try again later"

Appears as: A red line on the sign-in page

Why: More than five sign-in requests came from your address in 15 minutes, successes included. This is the per-address limit, not the account lock.

What to do: Wait 15 minutes.

"Account is deactivated. Contact your manager."

Appears as: A red line on the sign-in page

Why: A manager deactivated the account. The line only shows after a correct password.

What to do: Ask a manager to reactivate you on the Team page.

"Set your own password first, so you can still sign in."

> **Note** Managers only.

Appears as: A red toast on the Team page

Why: You tried to turn Sign in without passwords off while your own account has no password: with passwords required again you could not sign in yourself.

What to do: Set a password on your Profile page (Set a Password), then turn the switch off.

"This project requires passwords. Ask your manager to turn that off first."

Appears as: A red toast on the Profile page

Why: Remove My Password works only in a project whose manager turned on Sign in without passwords; this one requires them.

What to do: Keep your password, or ask a manager to turn on Sign in without passwords on the Team page.

"Invalid or expired token"

Appears as: Nothing on screen: the app returns to the sign-in page without a message

Why: A sign-in lasts 7 days. After that, or after your password changed, every request is refused and the app goes back to the sign-in page.

What to do: Sign in again. You return to the page you were on.

"Invalid or expired reset link"

Appears as: The box on the reset-password page

Also reads: "Reset link has expired"

Why: A manager's reset link lasts 15 minutes and an invitation link 7 days; each works once.

What to do: Ask a manager for a new link: Team page, the person's row, Reset password.

"Password must be at least 8 characters"

Appears as: A toast on the Profile page, or a line in the password form

Why: Server editions need 8 or more characters with an uppercase letter, a lowercase letter and a digit. The desktop editions need 4 or more.

What to do: Choose a password that meets the rule shown.

Project files and the installed app

"That project file is damaged or is not a GanttPulse project. Keeping the current one open."

Appears as: A Cannot open box from the tray app

Why: The file is not a GanttPulse database, or it cannot be read. The same box appears for a Recent file that was deleted or moved.

What to do: Pick another file. For a Recent entry that vanished, open the file from its new place with File > Open project file.

"Your workspace could not be opened - it is damaged. It was kept as"

Appears as: A box from the tray app at start

Why: The workspace database failed to open. It was moved aside as workspace.damaged-.db next to the original and a fresh, empty workspace was created.

What to do: Send the kept file to support, or restore a backup copy over the new workspace while the app is quit. Your other project files are untouched.

"Your last project could not be opened - it may have been deleted, moved, or"

Appears as: A box from the tray app at start

Why: The file the app had open last time is gone or unreadable, so the workspace opened instead.

What to do: Open the file from its new place with File > Open project file, or restore it from a backup.

"engine stopped unexpectedly"

Appears as: A GanttPulse stopped box, after which the app closes

Why: The local server process exited: another program locked the database, memory ran out, or it crashed. Your project is saved at every change.

What to do: Relaunch the app. If it repeats, send server.prev.log from the logs folder (tray icon > Open logs folder).

"GanttPulse failed to start"

Appears as: A box at start, and startup-error.log opens in Notepad

Also reads: "Could not determine a free port", "Server did not become ready within"

Why: The local server did not come up: no free port, or it took longer than its limit (up to 300 seconds on the first launch after an update).

What to do: Wait a minute and relaunch. Close other GanttPulse instances. If it repeats, send startup-error.log and server.log from the logs folder.

"Internal server error"

Appears as: A toast, or a line on the sign-in form

Why: Something failed inside the server with no friendlier message. On the installed editions this includes a foreign or locked database file and a read-only folder.

What to do: Retry once, then relaunch the app. If it repeats, read server.log in the logs folder or send it to support.

"is still running and could not be closed automatically"

Appears as: An error page in the installer

Why: The tray app kept the files busy while Setup tried to replace them.

What to do: Right-click the GanttPulse icon in the system tray, choose Quit, then run the installer again.

"This installer has an older version"

Appears as: An error page in the installer, after which Setup closes

Why: A newer GanttPulse is already installed. Installing an older build over it could make your project files unreadable, so Setup refuses.

What to do: Install the newer build. Your data is untouched.

"This folder already holds other files."

Appears as: A message in the installer, when you choose a folder

Why: GanttPulse checks at every start that its program folder holds only its own files. Installed into a folder with other files it would not start, so Setup does not take such a folder.

What to do: Choose an empty folder, a new one, or the folder of an earlier GanttPulse. The suggested folder is always fine.

"GanttPulse cannot run: its program folder holds a file that is not part of GanttPulse"

Appears as: A message when the app starts, or when it stops in the middle of work

Why: A file that is not GanttPulse's own is inside the folder the app is installed in. GanttPulse checks that folder at every start and does not run with a file it does not know there. Your projects are not in that folder and are untouched.

What to do: Remove the file the message names, then start GanttPulse again. Keep your own files outside the program folder. Windows' own desktop.ini and Thumbs.db are left alone.

"This GanttPulse server only answers requests addressed to this computer."

Appears as: Raw text in the browser tab

Why: The desktop editions answer only the computer they run on; another machine or a hostname is refused.

What to do: Open http://127.0.0.1: on this computer. For a shared server use the company edition.

"GanttPulse could not confirm this window is yours (the Windows process lookup failed)."

Appears as: A red toast when you choose Open project file or New project file on the sign-in screen. The sign-in screen itself says nothing: it has no names to pick, Project reads Current project, and the recent files and the Demo Project are missing

Why: GanttPulse asks Windows which account owns this window, so that only your own window gets the file names and the file dialogs. On this PC Windows did not answer within 30 seconds: PowerShell is blocked by a policy, or it is very slow. The sign-in screen does not say so by itself. It shows Current project instead of the file's name, no names to pick, no recent files and no Demo Project, and it cannot open another file; signing in by name is off. This message shows when you choose Open project file or New project file there.

What to do: Sign in to the open file with your password. On a fresh install, type a username and a password of your choice (4 characters or more): the first sign-in makes your account. An account that signs in by name has no password and cannot sign in on this PC: add a password on its Profile page from a PC where signing in by name works, or ask the file's manager to give it one (Team, Reset password). Where PowerShell is only slow, the File menu then works as usual. On a PC that blocks PowerShell, GanttPulse's file window cannot open: File > Open project file, New project file, Save As, Share a copy and Merge returned copy then say **Windows did not let GanttPulse open the file window on this PC (your company's settings may block it).** Trying again does not

help there; open your other files from File > Recent files. A key locked to one PC cannot be activated there, because its lock cannot be checked; a key that was already active keeps working. Beta keys are not affected. Ask IT to allow PowerShell for GanttPulse. If you have no account in the open file: quit GanttPulse from its tray icon, open the folder GanttPulseDesktop Login in your user folder, delete only the file named .active-file, and start GanttPulse again. It opens your workspace. Never delete a .db file there: workspace.db and claude.db hold your projects. The file .active-file is not hidden; its name starts with a dot and it sits beside workspace.db.

"Windows did not let GanttPulse open the file window on this PC (your company's settings may block it)."

Appears as: A red toast after File > Open project file, New project file, Save As, Share a copy or Merge returned copy, and on the sign-in screen after Open project file or New project file

Also reads: "Couldn't save a copy", "Couldn't pick the returned file"

Why: This PC does not let GanttPulse start Windows PowerShell, which draws the window for choosing a file (a company's settings can block it). The window never opens, so trying again does not help. The toast's title names what you asked for: **Couldn't open the project**, **Couldn't create project**, **Couldn't save a copy**, **Couldn't share the project** or **Couldn't pick the returned file**.

What to do: To open another file, use File > Recent files; on the sign-in screen, pick a project from the Project list. New project file, Save As, Share a copy and Merge returned copy need that window: ask your IT team to allow PowerShell for GanttPulse. They work once it is allowed.

"Choosing the file did not go through. Please try again."

Appears as: A red toast after File > Open project file and on the sign-in screen; a red line inside the dialog of Share a copy or Merge returned copy, which stays open

Why: The window for choosing a file opened, but its answer was lost on the way back, or GanttPulse was busy, for example while it switched files.

What to do: Try once more. If it repeats, quit GanttPulse from its tray icon and start it again.

"The file window was open for 10 minutes without a choice, so GanttPulse closed it. Choose again when you are ready."

Appears as: A red toast after File > Open project file, New project file or Save As (it also stays in the bell's list); a red line inside the dialog of Share a copy or Merge returned copy, which stays open

Why: The window for choosing a file stayed open for 10 minutes without a file being chosen, or it stopped answering. GanttPulse then closes that window by itself, so that a choice made much later cannot change your files after the page has moved on. Nothing was opened, created or saved. The sign-in screen closes its file window the same way, but it has no bell: its toast leaves after a few seconds, so if you were away you find the Project list as it was and no message.

What to do: Choose again: the same menu item or button opens a new window. While that window is open, the place you clicked says **Opening the file window…** and cannot be clicked a second time.

License

"Key must start with GP-"

> **Note** Managers only.

Appears as: A line under the license box

Also reads: "Invalid license key format."

Why: The pasted text is not a GanttPulse key, or only part of one.

What to do: Paste the whole key from your purchase email, or use Browse File for the key file.

"This license key is bound to a different machine."

Appears as: A line under the license box, or an amber banner

Also reads: "Hardware change detected."

Why: Machine-bound keys check this computer's hardware IDs. A server edition keeps Pro for 72 hours after a change; the desktop editions step down to Free at once.

What to do: Send the Hardware IDs shown on the License tab to the vendor for a key for this machine, or ask for a shareable (site) key.

"This license key has expired."

Appears as: A line under the license box, or a red banner

Also reads: "Features reverted to free tier."

Why: The key's end date passed. The app runs as Free; your data is untouched.

What to do: Renew and paste the new key. A warning banner shows for 30 days before expiry.

"This license key runs longer than one year."

Appears as: A line under the license box, or a red banner

Also reads: "GanttPulse accepts keys of up to one year."

Why: The key's end date is more than one year after the day the key was made. The app runs as Free; your data is untouched.

What to do: Ask the vendor for a new key. A key runs for up to one year, then it is renewed.

"This key's updates ended on"

Appears as: A line under the license box, or a banner on the License tab

Also reads: "and this version of GanttPulse was made later", "Your year of updates ends on", "This version keeps working"

Why: A paid key is one year of updates. A version made within that year keeps your plan for good. A version made after it runs as Free; your data is untouched.

What to do: Renew the key, or install a version made within the key's year: the banner's link lists the versions with their days.

"This license key has been revoked by the vendor."

Appears as: A red banner

Why: The key is on the signed revocation list that ships with the app and is re-read every hour.

What to do: Contact support for a replacement key.

"This PC's date is earlier than the latest date GanttPulse has seen on it, so the app runs as Free."

Appears as: A red banner on the License tab and a toast at sign-in; a line under the license box when a key is activated

Also reads: "PC date is set back", "so the key cannot be activated now"

Why: The PC's date is more than two days behind the latest date the app has seen: its own record, the date this version was made, or the date the key was issued. The key is kept; your data is untouched.

What to do: Set the PC's date and time correctly. The plan comes back by itself within moments. If the date is already correct, contact support.

"GanttPulse could not read this PC's hardware ids, and this license key has not been checked on this PC before, so the app runs as Free."

Appears as: A red banner on the License tab and a toast at sign-in

Also reads: "This PC's ids could not be read"

Why: The license key is locked to one PC. To check the lock the app reads the PC's ids, and this time Windows did not answer (PowerShell blocked or too slow). The app keeps a plan through such a moment only on a PC where it has checked this key before, and it has not checked it on this one yet. The key is kept; your data is untouched.

What to do: Wait a minute: the app checks again by itself, within a minute and then every hour, and the plan comes back as soon as one check works. If it stays like this, the PC may be blocking PowerShell for GanttPulse: ask your IT team, or contact support.

"This browser is too old to check your license key"

Appears as: An amber banner on the License tab and a message when one of the locked features is clicked, on a paid plan, in an old browser

Also reads: "This browser is too old for this feature"

Why: On a desktop install the page checks the license key itself before it draws some features of a paid plan: the Day, Month and Hours views, swimlanes, 3D, advanced filters, automatic scheduling and the Magic Overview, as far as your plan has them. That check needs a browser from 2025 or newer (Edge or Chrome 137, Firefox 129, Safari 17). Your plan and your data are untouched; everything the server does for your plan still works.

What to do: Update this browser, or open GanttPulse in a current Edge or Chrome (version 137 or newer) or Firefox (129 or newer). Nothing has to be entered again, and nothing has to be bought: your plan is active.

"A license key is set via GANTTPULSE_LICENSE environment variable, which takes priority."

> **Note** Managers only.

Appears as: A line under the license box and an amber banner

Why: On a server the environment variable wins over a key uploaded in Settings.

What to do: Remove the variable, restart the server, then upload the key here.

"This installation failed its integrity check and has been disabled."

Appears as: A banner and a License disabled toast

Why: Files of the installed app were altered, so Pro features and creating things are switched off.

What to do: Reinstall from the official installer.

Email

"authentication failed; check the username and password."

> **Note** Managers only.

Appears as: The Connection failed strip at the top of the Email Server tab

Why: The mail server rejected the credentials. Gmail and Microsoft 365 need an App Password (with 2-Step Verification on), not the account's normal password.

What to do: Re-enter the username and an app password, Save, then Test.

"the mail server refused the connection; check the host and port."

> **Note** Managers only.

Appears as: The Connection failed strip at the top of the Email Server tab

Also reads: "the connection timed out; check the host and port.", "the mail server host could not be found; check the host.", "a TLS/socket error occurred; check the port and encryption settings."

Why: The host or port is wrong, a firewall blocks the port, or the encryption does not match the port (465 is SSL, 587 is STARTTLS).

What to do: Pick the provider preset to fill the host and port, check the firewall between the server and the mail host, then Test again.

"Email isn't configured, so no message was sent."

> **Note** Managers only.

Appears as: A box in the Add Team Member and reset-password dialogs

Why: Invitations and reset links go by email only when an email server is configured; without one the app shows you the link to pass on. It expires.

What to do: Copy the link and send it yourself, or configure Settings > Email Server and try again.

"Your account has no email address. Add one in Profile to receive the test message."

> **Note** Managers only.

Appears as: The strip on the Email Server tab after Test

Why: The test message goes to you, and a username-only account has nowhere to receive it.

What to do: Add an email on the Profile page, Save Profile, then Test again.

Import, export, share and merge

"File exceeds maximum size of"

Appears as: A line in the Import dialog

Also reads: "File exceeds maximum of"

Why: Import caps: 8 MB per file, 5,000 rows, 10,000 tasks, 50,000 dependencies.

What to do: Split the file, or remove columns and rows you do not need.

"This is Microsoft Project's binary format."

Appears as: A line in the Import dialog after choosing an .mpp file

Why: GanttPulse reads Microsoft Project's XML, not its binary .mpp file.

What to do: In MS Project choose File > Save As and pick XML Format, then import that file.

"That file is not a shared copy of this workspace. Pick the file the member sent back to you."

Appears as: A Couldn't compare the files toast in the Merge dialog

Also reads: "This is an older copy."

Why: Merge accepts only a copy made with Share a copy of this file, and only the newest copy shared with that member.

What to do: Pick the file the member returned. If you shared a newer copy since, ask them for that one.

"Merge applied with issues"

Appears as: A warning toast after a merge

Why: Most changes merged. The named items could not: a task edited in the copy but deleted here is not brought back, a dependency type that would make a loop is kept as it was, an archived project is left out.

What to do: Review the named items by hand. Nothing was deleted automatically.

"No one else here can sign in and edit a copy. Add a member on the Team page first."

> **Note** Managers only.

Appears as: A line in the Share dialog

Why: A copy goes only to an active member or manager with a login. Viewers and contractors do not qualify.

What to do: Add a member, or convert a contractor to a member, on the Team page.

AI assistant

"AI assistant is turned off"

Appears as: An info toast from the header button

Why: No manager has turned the assistant on yet, or the saved key was cleared.

What to do: A manager turns it on under Settings > AI: a provider, a model, and a key (Ollama needs none).

"AI generation limit reached for this hour. Please try again later."

Appears as: An AI unavailable toast

Why: 20 generations per person per hour. The chat's own wording about waiting a minute is wrong for this cap: it is per hour.

What to do: Wait for the hour to turn, or ask a teammate to run it.

"Daily limit reached"

Appears as: A toast or a chat bubble

Why: The provider's free daily quota for that model is used up. It is shared by the team and resets at midnight UTC.

What to do: Switch model under Settings > AI, or wait until tomorrow.

"Ollama is not reachable at"

Appears as: The Failed strip after Test, or an AI request failed toast

Also reads: "Check the internet connection."

Why: The server could not open a connection to the provider: no internet, a proxy in the way, or Ollama not started.

What to do: Check the network from the server, start Ollama, then Test under Settings > AI.

"The provider rejected the API key. A manager can check it in Settings"

Appears as: A chat bubble or a toast

Why: The key is wrong, expired, or has no access to the chosen model. A bad key and an unknown model look the same.

What to do: A manager pastes a fresh key, picks a model the key can use, and clicks Test.

Other errors

"Record not found"

Appears as: A toast on save

Also reads: "Task not found"

Why: The row was deleted meanwhile, often by a teammate, so your edit had nothing to land on.

What to do: Reload the page. The change is gone with the row.

"Too many requests, please try again later"

Appears as: A toast

Why: The app takes 1,200 requests a minute from one PC, all its pages together (100 on a server edition), and 20 account-management requests a minute per user. More than that is refused until the minute is over.

What to do: Wait a minute and try again.

"Couldn't load this project's tasks"

Appears as: A notice in place of the chart or the workload table, with a Try again button

Also reads: "Couldn't load the workload"

Why: The list did not arrive: the app was asked for too much at once, or its answer was lost, for example while the app restarted on another project file. The project is not empty: your tasks are safe in the file.

What to do: Wait: the page asks again by itself, up to three times. If the notice stays, click Try again.

"This page couldn't load"

Appears as: A full-page notice with a Reload button

Why: A part of the app failed to download: the connection dropped, or the app was updated while you were on the page.

What to do: Click Reload. In the login editions you sign in again after the reload.

"Real-time connection lost. Reconnecting..."

Appears as: A warning toast

Why: The live-updates channel dropped. The app reconnects on its own and refetches what changed.

What to do: Wait. Reload the page if the toast stays.

"An unexpected error occurred"

Appears as: A Something went wrong notice with a Try Again button

Why: A part of the page crashed. Your data is safe on the server.

What to do: Click Try Again. If it repeats, note what you did and send the logs to support.

29. Glossary

What each word means in GanttPulse: people and roles, tasks and the plan, scheduling, plans and the platform.

People and Roles

Term	Meaning
Manager	Full control of the team's projects: any task, the roster, the team-wide settings, projects themselves. Confined to their own team(s). Uses a seat.
Member	Creates their own tasks and edits the tasks they own or are assigned to; picks same-team assignees only while creating a task; manages their own profile, password and time off. Uses a seat.
Viewer	A read-only login: sees every page a member sees except My Tasks, changes nothing, cannot be assigned work or comment, may ask the AI assistant. Seat-free.
Contractor	A name-only person with no login whom you can assign work to and plan time off for; convertible to a member later with the same history. Seat-free.
Admin	The system-level account that manages every user across teams from the Admin page: passwords, sessions, login history, the notification log, server info. Not a per-team role.
Seat	A license slot used by each login that can edit: managers and members. Viewers and contractors never use one. The free plan has 3.
Team (workspace)	Everyone who shares the projects: managers, members, viewers and contractors. People are confined to their own team(s).

Group	A tag on a task (Frontend, Backend...) that groups the chart into lanes, filters and colours bars; a sub-set of one team's people. Setting a task's group is manager-only.
Capacity	A person's available time as a percent of a full day (100 = full time, 50 = half). Set per person on the Team page (10 to 200); every overload judgement compares against it.
Allocation / work-%	How much of a person's capacity one task takes, set per assignment (default 100%). Overload is the sum of a person's allocations on a day against their capacity.
Time off	A date range during which a person has zero capacity; recorded on Profile > Time Off (managers and members) or by a manager on the Team page.

Tasks and the Plan

Term	Meaning
Project	A plan: its tasks, links, dates and people. One project is open at a time; it can be archived (read-only, kept) or deleted (gone).
Project file	Desktop login edition: the .db file a project lives in, with its own accounts. The free plan works in its default workspace; more files need Pro.
Task	The unit of work: a name, and optionally dates, duration, status, priority, progress, assignees, links, a deadline, a group, notes and hours.
Summary (parent) task	A task with subtasks. Its dates span the children, its progress is their duration-weighted average, its status is derived; only its start date is editable (it moves the group).
Subtask	A task nested under a parent (**Tab** indents, **Shift**+**Tab** promotes). One level on the free plan.
Milestone	A one-day task drawn as a diamond; cannot hold subtasks.
Status	Not Started, In Progress, On Hold, Completed, Cancelled. 100% progress means Completed and Completed means 100%; On Hold and Cancelled survive a progress edit.
Effective status	What a task counts as: a task with progress above 0 counts as active even if its status still says Not Started.
Priority	Critical, High, Medium, Low. Triage only; it never moves the schedule.
Progress	0 to 100%, from the slider, the % cell or the bar's handle.
Deadline	A promise date separate from the scheduled end. A red flag on the bar, solid when the schedule overruns it. The scheduler never moves a task to meet it.
Duration	Working days from start to end; set any two of start, end and duration and the third follows.
Today flag	My Tasks: a sun toggle that pins a task into a Today section on this device.
Saved view / preset	My Tasks: a named filter + sort + grouping + view; Gantt: a named filter combination (Pro).
Swimlane	A Gantt layout (Pro) that regroups the chart into one lane per assignee, group or team. Display-only: structure edits lock until you switch back to the task tree.
External ref	A name an outside tool (the Claude Code connector) gives a task so it can find it again; unique per project.

Claude's project	A project made through the Claude Code connector, marked in the portfolio. No caps on any plan; on the free plan it follows Claude's own work and people watch it: changing it, by hand or by asking Claude, needs a paid plan.

Scheduling

Term	Meaning
Dependency (link, connection)	Predecessor → successor, drawn as an arrow. Four types: Finish-to-Start (the successor starts after the predecessor finishes, the common one), Start-to-Start, Finish-to-Finish, Start-to-Finish. Only FS on the free plan.
Gap (lag)	The working days a link holds between its tasks; each link keeps its own. Editing it needs Pro; the free plan stores 0.
Auto-scheduling (cascade)	Pro: moving a task moves what depends on it. Modes in Settings > Display > Scheduling: Auto-cascade, Ask every time, Manual only.
Maintain gap on move LEFT / RIGHT	Two switches: pulling a predecessor earlier pulls its successors (on by default); pushing it later pushes them (off by default).
Conflict	A link whose dates are broken (the successor starts before the link allows). A red dashed arrow, a badge above the toolbar, and the Schedule Conflict dialog on Pro.
Critical path	The chain with zero slack: any delay on it delays the end. Critical Path Mode paints it amber.
Slack (float)	How far a task can slip before it joins the critical path; the thin tail past a bar in Critical Path Mode.
Baseline	A frozen copy of the schedule for comparison. The ghost track and the Variance column show the slip; Restore puts the dates back.
Checkpoint / time travel	Magic Overview: a saved moment the time rail can rewind the whole board to.
Working days	The team's work week and holidays from Settings > Calendar; durations, gaps and the critical path count only those.
Health score	0 to 100 from four weighted factors (on time, progress pace, critical-path health, blocked load); 70 and above is good. The Overview shows it as an A to F grade.
Stalled	A task in progress that has not changed for a while; one of the oversight notifications.

Plans and the Platform

Term	Meaning
Free / Starter / Pro / Enterprise	The plans. Free: 1 project, 15 tasks per project, 3 seats, the previews. See the Plans article.
License key	The GP- key that sets your plan, pasted under Settings > License. Machine-bound keys show Hardware IDs; shareable keys do not.
Grace window	Server editions: a machine-bound key that stops matching keeps Pro for 72 hours before demoting. Desktop editions demote at once.

Edition	Which build you run: the browser login edition (the installer, a tray icon, project files), the company edition on a server, or the no-login editions. Shown under Settings > About.
Workspace	Desktop login edition: the default project file every install has; the free plan's only one.
Monday Brief	Pro: the weekly findings a manager gets on Monday (email when the server can send mail), judged on the team's work week.
API token / connector	A personal token that lets the Claude Code connector push a plan and keep the chart live; its changes are audited as you, with the audit row reading "via Claude Code" and the session label. No Settings tab yet; see the connector article.
Work queue	The connector's view of a project: ready, unclaimed tasks in order; claim, release and blocker calls from Claude Code.
History panel	The clock icon in the header: the session's undo steps (100 per project); click any step to jump there.